

LEB6

**LONDON LEGACY DEVELOPMENT
CORPORATION: COMBINED
ECONOMY STUDY- 2018**

PART C: RETAIL NEEDS ASSESSMENT - 2018

FINAL DRAFT REPORT

CONTENTS

1. INTRODUCTION	1
<hr/>	
2. PLANNING POLICY OVERVIEW	2
National Planning Policy Framework (NPPF)	2
NPPF Consultation Draft 2018	5
The London Plan (2016)	5
Draft New London Plan (2017)	7
Town Centres Supplementary Planning Guidance (2014)	8
Local Planning Policy Context	9
Summary	15
<hr/>	
3. NATIONAL RETAIL AND TOWN CENTRE TRENDS	16
Retail Trends	16
Special Forms of Trading and Internet Shopping	17
Floorspace 'Productivity' Growth	20
Changing Retailer Requirements	21
Vacancy Levels	22
Trends in Retail-Led Investment and Development	23
Independents and Markets	26
Impact of Out-Of-Centre Retailing	27
Summary	28
<hr/>	
4. TOWN CENTRE HEALTH CHECK: METHODOLOGY	31
Engagement of Key Stakeholders	32
Retail Composition & Diversity of Uses	33
Vacancies	33
Multiple and Independent Retailers	33
Street/Covered Markets	33
Retailer Demand & Requirements	33
Prime Zone A Rents	34
Environmental Quality	34
Accessibility	34
Out-of-Centre Provision	34
New Investment & Potential Development	34
<hr/>	
5. STRATFORD HEALTH CHECK	35
Context	35
Retail Composition & Diversity of Uses	36
Multiple and Independent Retail Representation	40
Street Markets	40
Retailer Demand & Requirements	41
Prime Zone A Rents	42
Environmental Quality	42
Accessibility & Pedestrian Flows	42
Out of Centre Provision	43
New Investment & Potential Development	43
Summary	45
<hr/>	
6. BROMLEY-BY-BOW HEALTH CHECK	47
Context	47
Retail Composition and Diversity	48
Prime Zone A Rents	48
The Environment and Accessibility	49
New Investment and Development	49
Summary	50

7. HACKNEY WICK HEALTH CHECK	51
Context	51
Retail Composition and Diversity	52
Prime Zone A Rents	53
The Environment and Accessibility	53
New Investment and Development	54
Summary	54
8. EAST VILLAGE HEALTH CHECK	56
Context	56
Retail Composition and Diversity	56
Prime Zone A Rents	57
The Environment and Accessibility	58
New Investment and Development	58
Summary	58
9. PUDDING MILL HEALTH CHECK	59
Context	59
Composition	59
The Environment and Accessibility	59
New Investment and Development	60
Summary	60
10. QUANTITATIVE RETAIL NEEDS ASSESSMENT	61
The CREAT [®] Model: Key Baseline Assumptions & Forecasts	61
Study Area and Zones	62
Convenience Goods – Market Share Analysis	65
Comparison Goods – Market Share Analysis	67
Base Year Population and Projections	69
Base Year Expenditure per Capita & Forecasts	70
Total Available Expenditure	71
Market Share Analysis (excluding SFT)	71
'Inflow' (Trade Draw) from outside Study Area	72
Total Turnover of Centres and Stores	72
Retail Floorspace Commitments/Allocations	73
Capacity Forecasts	76
Summary	79
11. COMMERCIAL LEISURE NEED / 'GAP' ASSESSMENT	81
Leisure Expenditure Growth	81
Cinema Capacity	83
Eating & Drinking Out	84
Health & Fitness Need	89
Bingo & Gambling Needs	91
Other Commercial Leisure Needs	92
Cultural Activities	93
Hotel Provision	95
Conclusion	95
12. FUTURE STRATEGY	97
Centre Overview	98
Retail Needs Assessment	99
Leisure Needs / Gap Assessment	100
Local Impact Threshold Recommendations	100
Strategic Summary	101

APPENDIX 1: STUDY AREA

APPENDIX 2: STUDY AREA – EXTANT RETAIL STUDIES

APPENDIX 3: STRATFORD REQUIREMENTS LIST

APPENDIX 4: EXTANT RETAIL AND LEISURE COMMITMENTS

APPENDIX 5: POPULATION AND EXPENDITURE: CONVENIENCE GOODS

APPENDIX 6: POPULATION AND EXPENDITURE: COMPARISON GOODS

APPENDIX 7: CONVENIENCE GOODS MARKET SHARES

APPENDIX 8: COMPARISON GOODS MARKET SHARES

APPENDIX 9: FORECAST CONVENIENCE GOODS TURNOVER

APPENDIX 10: FORECAST COMPARISON GOODS TURNOVER

APPENDIX 11: CONVENIENCE GOODS CAPACITY ASSESSMENT

APPENDIX 12: COMPARISON GOODS CAPACITY ASSESSMENT

APPENDIX 13: GLOSSARY

1. INTRODUCTION

- 1.1 Carter Jonas ('CJ') was commissioned by the London Legacy Development Corporation ('LLDC') to assess the quantitative and qualitative need for new retail and leisure floorspace and uses in the LLDC area including the wider Stratford Metropolitan Centre. This study provides an appropriate and robust evidence base as part of the wider '*Combined Economy Study*' led by Regeneris Consulting together with other sub-consultants namely 'We Made That' and 'Tom Ford Creative Consulting'.
- 1.2 The output of this study will inform and assist the LLDC in its plan-making and decision-taking decisions across the LLDC area. The findings of the study will specifically provide the evidence base required to help inform the preparation of the emerging local plan and policy formulation.
- 1.3 For ease of reference the report is structured as follows.
 - **Section 2:** reviews the national and local planning policy context material to retail planning and town centres.
 - **Section 3:** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
 - **Section 4 - 9:** sets out the health check methodology and key findings of the health check assessments for Stratford, Bromley-by-Bow, Hackney Wick, East Village and Pudding Mill. These assessments draw on the Key Performance Indicators (KPIs) identified by the PPG; informed by research, audits and site visits.
 - **Section 10:** sets out the key assumptions and outputs of CJ's in-house CREAT^e (excel-based) capacity model, including: (i) the forecast population and expenditure available in the study area; (ii) the forecast convenience and comparison goods turnovers of all existing centres/stores; and (iii) the forecast trading characteristics of all known committed retail floorspace at the time of preparing this assessment. It also presents the detailed capacity forecasts for both convenience and comparison goods.
 - **Section 11:** sets out the findings of the commercial leisure and other town centre uses 'gap' assessment. This looks at the main leisure uses, including the need for new food and beverage uses, cinema and gyms.
 - **Section 12:** summarises the key findings of the quantitative and qualitative need for new retail and leisure floorspace and uses in the LLDC area. It sets out high level advice on how the LLDC can effectively plan for, manage and promote the vitality and viability of its current and emerging centres over the plan period to 2036.

2. PLANNING POLICY OVERVIEW

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to employment, retail and town centre uses, along with other material considerations.

National Planning Policy Framework (NPPF)

- 2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans¹ and Neighbourhood Plans². At the heart of the NPPF is a presumption in favour of sustainable development³, which is seen as “*a golden thread running through both plan-making and decision-taking*” (paragraph 14). The NPPF (paragraph 14) sets out the Government’s view of what sustainable development means in practice for both plan-making and decision-taking at the local level.
- 2.3 For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that “*...it is clear that development which is sustainable can be approved without delay*”.
- 2.4 The NPPF (paragraph 17) also sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.
- 2.5 The Framework (paragraph 150) emphasises that Local Plans are “*...the key to delivering sustainable development that reflects the vision and aspirations of local communities*”. They should be “*aspirational but realistic*” and should set out the opportunities for development and clear policies on “*...what will or will not be permitted and where*” (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).
- 2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the

¹ Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

² A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

³ Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.7 In terms of the evidence-based approach to planning, the Framework states 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” (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to:

- assess the needs for land or floorspace for economic development, including for retail and leisure development;
- examine the role and function of town centres and the relationship between them;
- assess the capacity of existing centres to accommodate new town centre development; and
- identify locations of deprivation which may benefit from planned remedial action.

2.8 The NPPF is clear that pursuing sustainable development requires “...careful attention to viability and costs in plan-making and decision-taking” (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified in the plan should “...not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened” (paragraph 173).

2.9 The Framework (paragraphs 18-149) sets out thirteen key ‘principles’ for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment.

2.10 In terms of ‘ensuring the vitality of town centres’ the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre⁴ environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:

⁴ The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

- 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 areas⁵, based on a clear definition of primary and secondary frontages⁶ 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 and 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 retail and leisure development needed in town centres;
- ensure that the needs for retail and leisure are “met in full” and “not compromised by limited site availability”. Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- 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 set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.11 When assessing and determining applications for main town centre uses⁷ that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a sequential test⁸, which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, “...preference should be given to accessible sites that are well connected to the town centre” (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.

⁵ Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

⁶ The NPPF (Annex 2) states that ‘primary frontages’ are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. ‘Secondary frontages’ provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

⁷ NPPF (Annex 2) defines ‘main town centre uses’ as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

⁸ This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

- Require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500sqm). The NPPF (paragraph 26) states that this should “include” assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, “...the impact should also be assessed up to ten years from the time the application is made”.

2.12 The NPPF (paragraph 27) states that “...where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused”.

2.13 As previously stated in Section 1, this study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014. The NPPG has streamlined and replaced the advice previously set out in *PPS4 Practice Guidance on Need, Impact and the Sequential Approach*. The revised NPPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and ‘impact tests’. Of relevance to this study the NPPG (para 003) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a “three-five year period” but should “also take the lifetime of the Local Plan into account and be regularly reviewed”.

NPPF Consultation Draft 2018

2.14 At the time of writing this report, a draft version of the NPPF is currently out for consultation. Whilst the Government’s draft revised Framework is very much focussed on the delivery of more homes, there are some important proposed changes to policy aimed at ‘ensuring the vitality of town centres’.

2.15 The draft Framework recognises that where centres are in decline then policies and measures should be promoted that support diversification and changes of use (paragraph 86g). This policy is clearly responding to the fact that town centres and high streets are now facing possibly the most significant challenges to their roles and functions in generations. The challenge for local authorities, developers, investors and landlords is how to effectively plan, fund, manage and promote the future of town centres, when retail is no longer the key driver of their vitality and viability.

The London Plan (2016)

2.16 **The London Plan (2016)** is the overall spatial development strategy for London which sets out an integrated economic, environmental, transport and social framework for the development of London over the next 20-25 years. The plan includes a number of policies relating to town centres, retail and the LLDC area including:

1. **Policy 2.4 (The 2012 Games and their Legacy)** concerns the last legacy of the Olympic Games on the LLDC area. The policy states that: “The Mayor will work with and through the London Legacy Development Corporation to “promote and deliver physical, social, economic and environmental regeneration of the Olympic Park and its surrounding area, in particular by maximising the legacy of the

2012 Olympic and Paralympic Games, by securing high quality sustainable development and investment, ensuring the long term success of the facilities and assets within its direct control and supporting and promoting the aim of convergence” and will seek to close the deprivation gap between the Olympic host boroughs”.

The LLDC’s Development Plan Document (DPD) should plan for Stratford’s development as a Metropolitan Centre, strategic transport hub and strategic location for growth in retail, office, academic and leisure uses. The DPD should also consider social, community and cultural infrastructure requirements and set out how the areas around the Queen Elizabeth Olympic Park (QEOP) can benefit from, be accessible from and be fully integrated with the retained venues and legacy proposals. The Mayor and boroughs should promote the QEOP including its venues and surrounding attractions as international visitor destinations.

The regeneration of the LLDC area will be focused on Stratford, the Lower Lee Valley and parts of the Upper Lee Valley Opportunity Area. Policy 2.13 (as discussed below) identifies the Lower Lea Valley (including Stratford) as an opportunity area.

2. **Policy 2.13 (Opportunity Areas and Intensification Areas)** identifies the Lower Lee Valley as an opportunity area. The London Plan sets out that this area is currently the most important single strategic regeneration initiative for London an urban renewal challenge of global significance securing the legacy of the 2012 Olympic and Paralympic Games. Development potential for this area comprises a minimum of 32,000 new homes and an employment capacity for around 50,000 new jobs, including 30,000 predominately office jobs at Stratford City. The new Metropolitan Centre will be focused at Stratford Town Centre and a mix of employment, residential, and open space uses across the Lower Lee Valley. The Mayor will support partnerships preparing and implementing opportunity area planning frameworks to realise the areas’ growth potential as well as building on existing frameworks.
3. **Policy 2.14 (Areas for Regeneration)** and its associated Annex 2, sets out the areas identified for regeneration in which the Mayor will work with strategic and local partners to co-ordinate sustained renewal by prioritising them for neighbourhood-based action and investment. The objective of the Mayor’s regeneration programmes is to drive growth in London’s towns and high streets. Annex 2 lists Stratford as a centre that has potential for high growth and regeneration. High growth centres are defined as town centres likely to experience strategically significant levels of growth with strong demand for retail, leisure and office development with existing/potential public transport capacity to accommodate it.
4. **Policy 2.15 (Town Centres)**, and its associated Annex 2, identifies London’s network of town centres, including the CAZ, major centre, district centres and neighbourhood centres. The development of London’s network of town centres should provide a structure for sustaining and improving a competitive choice of goods and services which are conveniently accessible. This policy sets out the importance of sustaining and enhancing the vitality and viability of the centre; identifying town centre boundaries, primary shopping areas and primary and secondary frontages; accommodating economic and/or housing growth through intensification and selective expansions; and enhancing the competitiveness, quality and diversity of the town centre retail and other uses.

The associated Annex 2 and Map 2.6 identifies Stratford's potential future classification change from a Metropolitan centre to a centre with International status over the Plan Period. A Metropolitan centre is defined as serving a wide catchment which can extend over several boroughs, containing a minimum of 100,000 sqm of retail, leisure and service floorspace. These centres are generally very accessible. Stratford's change to an International centre could see Stratford become a globally renowned retail destination with a wide range of high-order comparison and specialist shopping with excellent levels of public transport accessibility. It also recognises Bromley-by-Bow's potential change from an unclassified centre to a District centre.

5. **Policy 4.7 (Retail and Town Centre Development)** sets out the Mayor's support towards a strong partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres. The policy states that boroughs should identify future retail and commercial leisure floorspace needs; undertake regular town centre healthchecks; resist inappropriate out of centre development; and manage existing out of centre retail and leisure development in line with the sequential approach.
6. **Policy 4.8 (Supporting a Successful and Diverse Retail Sector and Related Facilities and Services)** states that in order to support the economic growth of centres, LDFs must take a proactive approach to retail planning by: bringing forward capacity for additional comparison goods retailing including in major centres; supporting convenience retailing particularly within district and neighbourhood centres; supporting London's markets; and identifying areas underserved in local convenience shopping and services provision.
7. **Policy 4.9 (Small Shops)** aims to support small or independent retailers by suggesting that where appropriate LDFs impose conditions or seek contributions through planning obligations when considering applications for large scale retail developments. This will help to strengthen and promote the retail offer, attractiveness and competitiveness of centres.

Draft New London Plan (2017)

2.17 The new Draft London Plan was published on 29th November 2017 with consultation taking place between 1st December 2017-2nd March 2018. The London Plan (2016) still remains the adopted Development Plan however the Draft London Plan is now a material consideration in planning decisions. It will gain more weight as it moves through the process to adoption however the weight given to it is a matter for the decision maker.

2.18 The main changes and key policies relating to town centres are as follows:

- **Policy SD1 (Opportunity Areas)** continues to allocate the Olympic Legacy SPG Area as an Opportunity Area.
- **Policy SD 6 (Town Centres)** will replace the similar Policy 2.15 of the current adopted London Plan. The policy aims to promote the vitality and viability of London's town centres as well as supporting the adaption and restricting of town centres in response to the challenges and opportunities presented by multi-channel shopping and changes in consumer behaviour.

- **Policy SD7 (Town Centre Network)** and associated table and figure A1.1 continues to support Stratford's future potential change to an international centre.
- **Policy SD 8 (Town Centres: Development Principles and Development Plan Documents)** states that Development Plans and development proposals should take a town centres first approach. The policy also sets out the additional requirements for development plans and development proposals.
- **Policy SD9 (Town Centres: Local Partnerships and Implementation)** supports the formation of town centre strategies produced in partnership at a local level in a way which is inclusive and representative of the local community. These strategies should be tailored to the specific town centre. The policy also sets out that regular health checks should be undertaken to inform policy and that targeted Article 4 Directions should be introduced where appropriate to remove permitted development rights for office, light industrial and retail to residential in order to sustain town centre vitality and viability.
- **Policy SD10 (Strategic and Local Regeneration)** identifies Stratford as a Strategic Area for Regeneration. Development Plans and OAPFs and development proposals should contribute to regeneration by tackling spatial inequalities and the environmental, economic and social barriers that affect the lives of people in the area. Boroughs should also develop locally-sensitive policies and initiatives that contribute to the renewal of town centres in these areas.
- **Policy E9 (Retail, Markets and Hot Food Takeaways)** supports a successful, competitive and diverse retail sector which promotes sustainable access to goods and services for all Londoners in line with the wider objectives of the plan related to town centres.

Town Centres Supplementary Planning Guidance (2014)

2.19 **The Town Centre Supplementary Planning Guidance (SPG) (2014)** was published in July 2014 and specifically provides guidance on the implementation of London Plan Policy 2.15 (Town Centres) and its associated Annex, along with other policies in the Plan with specific reference to town centre development and management (including Policies 4.7-4.9 above). The SPG has been drawn up in the context of the NPPF, the Localism Act, the Portas Review and an extensive range of research, and has weight as a formal supplement to the London Plan. It reaffirms a strong 'town centres first' approach to accommodating new retail, leisure and commercial development, encouraging development within town centres, or in well integrated edge of town centre locations (Policy 4.7). It also supports a strong partnership approach to assessing need and bringing forward capacity for new retail, commercial, culture and leisure development in town centres.

2.20 The SPG is focused on a set of principles which include:

- **Supporting the evolution and diversification of town centres** – including the potential of the International, Metropolitan and Major centres to accommodate growth, especially in comparison goods retailing (London Plan, policy 4.8Ba), and the roles of District, neighbourhood and local centres to accommodate local needs for convenience retailing and essential local services (London Plan, policy 4.8Bb).

- **Delivering mixed use housing intensification** – identifies the potential for higher density residential development in town centres and the need for proactive strategies to realise this potential, including any necessary transport improvements (policy 2.15Cb). This policy identifies Stratford and the Olympic Park as being at the heart of a new mixed use urban district in east London, comprising the capital’s most important regeneration project for at least two generations.
- **Quality matters** – high quality urban design, public realm and environment are of paramount importance if town centres are to be successful and safer places to live, work and visit, and attract investment. It should be integral to strategies to regenerate town centres with a diverse range of services and increased residential population with an improved quality of life (policies 7.5, 2.15Bg, 2.18, 5.10 and 5.11).
- **Promoting accessibility and connectivity** - The Mayor’s Transport Strategy⁹ places strong emphasis on the need for good transport links, to allow easy, efficient access to town centres to enable them to compete and to remain successful. Increased public transport accessibility can benefit town centres also by extending their potential resident and working catchment populations. Town centres also support the close integration of transport and development (London Plan policy 6.1). Capitalising on the existing and future potential accessibility of town centres, the scope for intensification, regeneration and higher density development including housing should be explored in line with London Plan policy 2.15Cb (see sections 1 and 2). Boroughs are encouraged to promote higher densities in town centres, especially those with the highest accessibility and existing capacity or where there are plans to improve public transport provision. The SPG identifies that major public transport scheme investments such as Crossrail, Thameslink Programme, Tube upgrades and further expansion of London Overground will yield substantial benefits for many town centres and act as a catalyst for growth and intensification (para 4.2.5)¹⁰.
- **Town centre regeneration and initiatives** - There are various complementary measures and funding to support town centre renewal including the Mayor’s Action for High Streets a series of investment initiatives including: Outer London Fund (OLF), Mayor’s Regeneration Fund (MRF), London Enterprise Fund (LEF), and Growing Places Fund. Portas Pilots in London have also been incorporated under the umbrella of the OLF and MRF interventions.
- **Proactive town centre strategies** – the SPG provides further guidance on town centre strategies, management of the town centre network, the London Plan ‘town centres first’ approach, and co-ordination with the wider city region and town centre health checks.

Local Planning Policy Context

2.21 The LLDC has the responsibility for overseeing the development of buildings and outdoor spaces in and around the QEOP. The LLDC’s purpose is to use the legacy of the London 2012 Games to develop a new heart for east London, create opportunities for local people and drive innovation and growth across London and the UK through long-term planning, development, management and maintenance of the park.

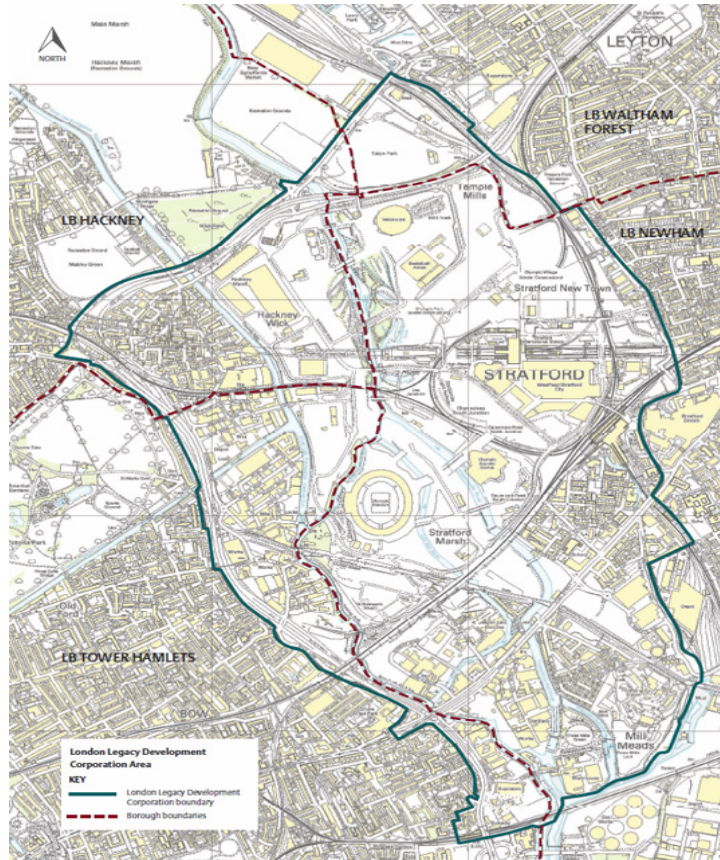
⁹ See MTS policy 6 and 2013 London Town Centre Health Check, GLA 2014 and London Travel Demand Survey

¹⁰ TfL’s Business Plan (updated annually) and the national rail HLOS investment programme detail the majority of committed investment in London’s transport infrastructure.

2.22 In 2012, the LLDC became the LPA for its administrative area, a role that had previously been divided between the four London boroughs of Newham, Tower Hamlets, Waltham Forest and Hackney, the Olympic Delivery Authority and London Thames Gateway Development Corporation. Any planning application submitted for the area, known as the Legacy Corporation planning boundary, must be submitted to the LLDC rather than the local borough.

2.23 The figure below shows the boundary map for the LLDC area:

Figure 2.1: LLDC Planning Area Map



2.24 The LLDC has prepared a single **Local Plan 2015 to 2031 (adopted 2015)**, rather than a number of individual Local Plans, setting out the planning strategy for the area over the development plan period, how the development needs and requirements can be met as well as setting out development management policies to help determine planning applications. Alongside the development of its own land and working with its partners, including the local communities, the four Boroughs, landowners and developers, it will use its wide-ranging powers to implement projects and bring about change that will meet the established purpose of creating a lasting legacy from the 2012 Games and supporting and promoting the aims of convergence.

2.25 The main policy concerning town centre and retail development is **Policy B.2 (Thriving Town, Neighbourhood and Local Centres)**. This policy sets out that main town centre uses will be focused according to the scale, format and position in the retail hierarchy, as established in Table 3 of the Local Plan. The function for each

centre will be protected by: maintaining an appropriate number of A1 uses and resisting concentration of other uses, namely A2/A5; maintaining active retail frontages; sequential assessment of sites for main town centre uses; retail and leisure impact assessments where a retail/leisure use is proposed of more than 2,500 sqm outside the Metropolitan centre boundary or 200 sqm outside other centres; allowing edge-of-centre development supporting cultural, sporting and visitor growth at the Metropolitan Centre; and allowing complementary residential development. It should be noted that at the time of the publication of the Local Plan, betting shops and pay day loan shops were classified as Use Class A2, rather than Sui Generis.

2.26 This policy does not identify primary or secondary retail frontages. As Westfield Stratford City is the only significantly developed retail offer within the LLDC plan area and has a format that does not enable frontages to be defined.

2.27 **Table 3** under **Policy B.2** sets out the retail centre hierarchy for the LLDC area. This sets out the following hierarchy as well as the quantum of retail floorspace available:

- **Metropolitan Centre – Stratford:** Provision of 55,000 sqm (net sales area) of additional comparison floorspace to 2030;
- **Potential District Centre – Bromley-by-Bow:** Total floorspace, including existing, of between 10,000 and 50,000 sqm. Approximately 6,200 sqm (net sales area) comparison retail floorspace;
- **Neighbourhood Centre – Hackney Wick:** Total floorspace including existing up to 10,000 sqm;
- **Local Centre – Pudding Mill:** Total floorspace should not exceed 10,000 sqm. Around 2,500 sqm retail permitted.
- **Local Centre – East Village:** Total floorspace including existing should not exceed 10,000 sqm.

2.28 **Policy B.3 (Creating Vitality through Interim Uses)** states that proposals for temporary interim use will be supported where: vacant units will be used for small-scale retail, community, leisure or cultural and creative industries; land has been set aside for development in the longer term; managed or affordable workspace is proposed prior to delivery of long-term phased development with planning permission.

2.29 Section 9 of the Local Plan divides the LLDC area into four sub-areas, allowing the plan to include specific placed based policies relevant to the character of each area. This section also sets out a number of site allocations for each of the four sub-areas. The following provides an overview of each of the sub-areas:

- **Sub-Area 1 (Hackney Wick and Fish Island):** The vision is for Hackney Wick and Fish Island to become a more diverse and well connected series to mixed and balanced neighbourhoods with places of social, cultural and economic activity. Policies 1.1-1.6 set out the policy direction for this sub-area. The policies and site allocations focus on the key priorities for this area, which include: heritage-led regeneration; promotion of Hackney Wick and Fish Island's unique identity; protection of creative and cultural industrial employment uses; promotion of a mix of uses including a significant increase in residential floorspace; establishing a new neighbourhood centre to provide a focus for retail, community, leisure and service uses; enhancement of the waterside environment, creating improved/new pedestrian and cycle routes and better access to Hackney Wick station. There is potential for 20,000 sqm of A1-A5 and D1-D2 Use Class

floorspace stemming from the Local Plan sub area vision. As a designated Neighbourhood Centre it is anticipated that the Hackney Wick Neighbourhood Centre will comprise some 10,000 sqm of this floorspace. Site allocation SA11.1 sets out that the area around Hackney Wick station will support comprehensive employment-focused mixed-use development including a significant number of new homes complemented by new retail, leisure, community facilities and food and beverage.

- **Sub-Area 2 (North Stratford and Eton Manor):** The vision sets out that North Stratford and Eton Manor will become an area of new high-quality housing with new Local Open Spaces. This sub-area comprises East Village. Policies 2.1-2.4 establishes the policy response to the area's main priorities which include: continued delivery of housing to ensure a balanced range of homes; continued delivery of high quality development; provision of quality public realm; and ensuring the Local Centre development a local function, distinct to Stratford Metropolitan centre. Site Allocation SA2.2 allocates a maximum of 9,999 sqm of retail space at East Village as part of the Local Centre proposals.
- **Sub-Area 3 (Central Stratford and Southern Queen Elizabeth Olympic Park):** This area will comprise a variety of new high-profile education and sporting facilities, retail, leisure and business uses with high quality housing. The excellent public transport links will continue to draw investment to the area. This sub-area comprises the Westfield Stratford City development. Priorities for the area include: supporting the Metropolitan Centre through driving change and investment for business, cultural, visitor attractions and educational facilities; facilitating regeneration for the existing communities to ensure benefit from the 2012 Olympic Games; and enhancing pedestrian and cycling connections; achieving quality public realm. This revitalized part of Stratford, as a Metropolitan Centre of international importance, will be the main engine driving regeneration in this part of east London. Policy 3.1 sets out that town centre uses within this location should support, not be in competition with Stratford Metropolitan Centre. Site Allocation SA3.1 allocates a range of town centre uses and residential accommodation appropriate to the scale and form of the Metropolitan Centre, forming an extension to the centre boundary of Stratford.
- **Sub-Area 4 (Bromley-by-Bow, Pudding Mill, Sugar House Lane and Mill Meads):** The vision states that this will become an area of new business and residential communities and will accommodate a new District Centre at Bromley-by-Bow and Local Centre at Pudding Mill. Priorities for the area which Policies 4.1-4.4 will aim to achieve include: a new district centre at Bromley-by-Bow; enhanced connectivity; utilisation of the character and history of the waterways to bring forward new development; provide mixed use development across the area; and preserve and enhance heritage assets. Policy 4.1 sets out the future for Bromley-by-Bow as a potential District Centre. Site Allocation SA4.1 sets out that a new mixed use area will provide new and re-provided retail floorspace, a new park, riverside walk, community facility, new homes and employment space. Site Allocation SA4.3 allocates a new Local Centre adjacent to Pudding Mill Lane DLR station, new open space, public realm, new homes and new businesses.

2.30 The **Bromley-by-Bow Supplementary Planning Document (SPD) (adopted 2017)**, provides further guidance on the implementation of policies within the Local Plan and aims to assist landowners in developing proposals that achieve comprehensive development at Bromley-by-Bow. The SPD sets out a detailed vision for the development of a new District Centre, drawing on the relevant sub-area 4 Local Plan policies and site allocations. Site Allocation SA4.1 of the Local Plan covers much of the area covered by the SPD. It provides

guidance on appropriate land uses, transport and connectivity, conservation and heritage and heights and massing. The SPD also sets out guidance on achieving the delivery of the Local Plan allocations including the approach to the delivery of the required infrastructure that has been identified, environmental design principles and phasing.

- 2.31 The **Pudding Mill SPD (2017)** provides guidance to achieving the policies set out in the Local Plan as well as site allocation SA4.3 which identified Pudding Mill as a location for a new Local Centre alongside a significant number of new homes. The SPD aims to: promote the comprehensive development of Pudding Mill; provide guidance on the design of development schemes, public realm and streets to achieve a high quality environment; identify the constraints and opportunities applicable to the development of the area; and identify new and improved infrastructure to support development within Pudding Mill. Similarly to the Bromley-by-Bow SPD, the document sets out steps for delivery and implementation of the proposals.
- 2.32 The **Hackney Wick and Fish Island SPD- Consultation Draft (July 2016)**, was produced for the purpose of public consultation and is intended to provide detailed guidance for development proposals within Hackney Wick and Fish Island, namely employment uses, new housing and the development of a new neighbourhood centre. The SPD sets out area wide priorities as well as area specific guidance and guidance for implementation and delivery. The SPD also provides guidance on the location of retail, leisure and community uses within the new neighbourhood centre to provide 'active frontages' as well as potential locations for workspace clusters and retained heritage assets.
- 2.33 The Local Plan has replaced the adopted Local Plans of the four boroughs that had previously had effect within the Legacy Corporation area. Although we do not review these documents in detail, a brief overview of these documents are provided below:
- **London Borough of Hackney:** The Core Strategy 2010-2025 (adopted 2010) sets out the overarching planning policies for development within this area as well as providing high level policy for strategic sites including Hackney Wick.
 - **London Borough of Newham:** The Core Strategy 2027 (adopted 2012) contains the most up to date planning policies for the borough and also sets out a policy direction for Stratford's emergence as a Metropolitan centre, the Olympic Quarter and Pudding Mill Lane.
 - **London Borough of Tower Hamlets:** The Core Strategy 2025 (adopted 2010) sets out strategic planning policies for the borough, including Fish Island and Bromley-by-Bow which is located within the Legacy Corporation area.
 - **London Borough of Waltham Forest:** The Core Strategy (adopted 2012) contains the planning vision and strategy for the borough including parts of Leyton which falls within the Legacy Corporation's area.
 - **Hackney Wick AAP:** Adopted in September 2012 provides the strategic policy options under the London Borough of Hackney's Core Strategy (2010-2025) and how these could be applied to Hackney Wick.
 - **Fish Island AAP:** Adopted in September 2012 contains the strategic vision under the London Borough of Tower Hamlet's Core Strategy 2025 for the regeneration and future development at Fish Island.

2.34 **The LLDC Retail and Leisure Requirements Review (2014)** assessed the quantitative and qualitative retail and leisure needs of the Legacy Corporation area over the period to 2031. The study forms part of the evidence base for the adopted Local Plan. The study identified that Stratford is performing well with a strong retail and leisure mix with relatively few gaps in the offer. However, in Hackney Wick and Bromley-by-Bow a limited offer was identified and it was concluded that improvements to the existing offer would be necessary in order to meet local shopping needs. A forecast requirement of 15,000 sqm net comparison goods floorspace by 2021, increasing to 39,300 sqm net by 2026 and 61,300 sqm net by 2031 was identified. In terms of convenience goods, no quantitative requirement for additional floorspace was identified over the entirety of the study period. It should be noted that the findings of the study will now be largely out of date however it provides a useful context for the current update.

2.35 Evidence base studies for the four composing boroughs have also been identified:

- **London Borough of Hackney, Town Centre and Retail Study (2017)** sets out that there is no quantitative need for comparison goods floorspace to 2022 however by 2027 there is a requirement for 4,700 sqm net to 6,100 sqm net. By 2033 this increases to 16,600 sqm net to 19,500 sqm net. In terms of convenience goods there is a requirement for 8,200 sqm net to 9,200 sqm net by 2022, 9,000 sqm net to 9,900 sqm net by 2027 and 10,000 sqm net to 11,000 sqm net by 2033. The opening of Westfield Stratford has not adversely impacted any of the centres within the borough however Stratford's comparison goods market share from the study area has increased from 1.5% in 2005 to 11.7% in 2017.
- **London Borough of Newham, Town Centre and Retail Study Update (2016)** provides an update to the 2009 Town Centre and Retail Study. The update comprises a review of Stratford City and Stratford town centre. It encompasses analysis across the Metropolitan Centre and represents the most up to date evidence base on need for the centre as a whole. The study identified that Stratford City and Stratford town centre have a market share of 28% across the study area, with Stratford City accounting for 23.4% of the market share. The assessment identified a need for 65,907 sqm net of comparison goods floorspace by 2025, with 52,392 sqm net arising in the northwest sub-area. The report recommends that this is directed to Stratford in the first instance. The assessment also identified a need for 3,479 sqm net of convenience goods floorspace by 2020. Stratford City is considered to be a successful shopping and leisure destination of regional importance, substantially increasing trade retention within Newham and trade inflow from beyond.
- **London Borough of Tower Hamlets, Town Centre Capacity Study (2016)** covered areas within the LLDC including Bromley-by-Bow and Hackney Wick. In terms of Bromley-by-Bow, the study concluded that the centre is currently not performing as a typical town centre due to having a limited mix of town centre uses as currently the retail in the centre consists of namely only a Tesco superstore. It also highlighted how the centre is constrained by the A12 road. The study identified no borough-wide capacity for new retail floorspace over the short and medium term to 2026 due to the impact of new commitments in the planning pipeline. Total retail floorspace capacity increases thereafter to 8,683 sqm net by the end of the plan period (2031).
- **London Borough of Waltham Forest, Retail and Leisure Study (2009)** identified that in terms of convenience goods, the quantitative capacity assessment identified a potential for additional convenience

goods floorspace within the borough. Surplus expenditure at 2016 could support 8,100 sqm net of floorspace, increasing to 1,800 sqm net at 2026. In terms of comparison retailing, surplus expenditure at 2016 could support a minimum of 11,600 sqm net of floorspace, increasing to 48,300 sqm net up to 2026 allowing for the impact of the Stratford City development.

Summary

2.36 In summary, the underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations “first” in accordance with the sequential approach. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping and competition from major out-of-centre developments. These issues are discussed further in **Section 3**.

3. NATIONAL RETAIL AND TOWN CENTRE TRENDS

3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

Retail Trends

3.2 Following an unprecedented period of growth in retail sales and expenditure since the mid-1990s, the onset of the longest and deepest economic recession in living memory in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This reduced disposable income and retailers' margins were squeezed further.

3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to around 2% in 2015 and 2016 against the backdrop of a weaker global economy and further uncertainty on financial markets. The Brexit vote and subsequent triggering of Article 50 is likely to further dampen business/consumer confidence and the prospects for new investment and growth in the near future. Indeed, over the last 12 months the UK has shifted from being one of the fastest growing G7 economies to among the slowest. Against this background of economic and political uncertainty, Experian Business Strategies project lower GDP growth of around +1.5% in 2017 and 2018.

3.4 This dampening in economic growth is also impacting on household income and spending, and ultimately retail sales. The combination of higher inflation, a decline in real wages, a rise in interest rates and a tightening of consumer credit will continue to place a drag on real incomes and consumer spending. Experian forecast that retail sales growth will average 1% in 2018 and 1.9% in 2019.

3.5 **Table 3.1** shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest Retail Planner Briefing Note 15 ('Briefing Note') published in December 2017. This is based on their 'central forecast scenario' which assumes annual growth in GDP averaging 2% from 2016 to 2035.

Table 3.1 Forecast year-on-year growth in retail expenditure per capita

Volume Growth per head (%):	-----ACTUAL GROWTH-----									EXPERIAN FORECASTS					HISTORIC TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020-24	2025-36	1997-07	1997-16
Total Retail Spend	2	-2.8	0.7	-1.1	1.3	1.9	2.1	2.8	3.5	1.4	0.4	1.2	2.2	2.3	5.4	3.5
Convenience	-4.2	-4.2	-0.6	-3.3	-0.2	-0.3	-0.3	-1	1	0	-0.6	-0.2	0.1	0.1	0	-0.6
Comparison	4.4	-2.9	1.4	0.1	2.3	3.5	3.6	5.2	5	2.3	0.9	2.1	3.2	3.2	8.3	5.6

Source: Experian Retail Planner Briefing Note 15 (December 2017); Figures 1a and 1b.

Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2016.

- 3.6 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels between 2008 and 2015. Although there was positive growth of +1% in 2016, the forecasts show a return to no or negative growth over the period 2017 to 2019, with limited growth of +0.1% thereafter up to 2036. The forecast growth rates compare with previous historic trends of no growth between 1997 and 2007, and negative growth of -0.5% over the long term, between 1997 and 2016.
- 3.7 For comparison goods the Experian data indicates that annual growth rates are recovering from a low of -2.9% in 2009, to a peak of +5.2% in 2015 and +5% in 2016. However, for the reasons set out above, Experian forecast a dampening in growth in the immediate post-Brexit period; to +2.3% in 2017, +0.9% in 2018 and +2.1% in 2019. Thereafter, comparison spend growth is forecast to average circa +3.2% between 2020 and 2036. Despite the growth forecast by Experian, it is clear that comparison goods growth rates are well below historic trends of +8.3% per annum for the period 1997 to 2007.
- 3.8 Any further dampening of growth rates over the medium to long term could have implications for the viability of existing retail businesses and the take-up of new space, as well the need ('capacity') for new retail floorspace over the forecast period. This needs to be taken into account when assessing and reviewing the capacity forecasts for new convenience and comparison goods floorspace set out in this report.

Special Forms of Trading and Internet Shopping

- 3.9 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of special forms of trading (SFT)¹¹. Based on ONS data, Experian Business Strategies (EBS) estimate that:
- The value of internet sales in 2017 is estimated to be £55.1bn (at current prices). This represents a +31% increase from £42.1bn in 2015 and a +13% increase from £48.9bn recorded in 2016.
 - The value of other (non-internet) SFT sales (e.g. mail order, vending machines, market stalls, etc.) is estimated to be £8.8bn in 2017. This represents a more modest growth from circa £8.5bn in 2016 and £7.9bn in 2015.

¹¹ Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

- Total non-store retail sales are therefore estimated to amount to some £63.9bn in 2017. This represents a 28% growth in sales from £50bn in 2015 a substantial increase from £17.1bn recorded in 2006.
- The overall market share of SFT, as a proportion of total retail sales, has increased nationally from 5.4% in 2006 to 16.5% in 2017. It is forecast by Experian to grow to 19.3% by 2021 and to 22.5% by 2036 (see table below).

Table 3.2 SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	16.5%	19.3%	20.9%	22.1%	22.5%
Comparison	19.7%	22.5%	23.4%	23.8%	24.0%
Convenience	10.8%	13.1%	15.5%	17.2%	17.8%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

- 3.10 This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.
- 3.11 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares downwards to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 Revised forecast growth in SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	10.6%	12.4%	13.6%	14.5%	14.9%
Comparison	14.8%	16.9%	17.5%	17.9%	18.0%
Convenience	3.2%	3.9%	4.6%	5.2%	5.3%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

- 3.12 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV and GAME stores across the UK, and the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping across the defined study area and zones (see **Section 10**).

- 3.13 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a 'digital divide' between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's high street communities. Yet the success of firms at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.
- 3.14 Notwithstanding the clear and present impact of the digital revolution on how people shop and 'play', some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient 'click and collect' facilities to help drive footfall; whereby customers can browse and order a product on-line, and then collect it from a local store at their convenience. According to research by NEMS Market Research¹², 48% of online shoppers have at some point made 'click & collect' purchases (i.e. bought or ordered goods online, but then collected the goods themselves). This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its 'click & collect' service account for circa one-third of the company's total turnover. Amazon also has an agreement with the Co-operative and Morrisons to locate self-service lockers in local stores. According to research by NEMS Market Research Ltd, a wide range of retailers are rated positively in terms of having a good 'click and collect' service, but a few stand out. For example Argos was rated positively by a third of the people who have used a 'click & collect', followed by Tesco (27% rated its service as good), ASDA (15%), John Lewis (13%) and Marks & Spencer (7%). The only 'pure' online retailer that was rated highly was Amazon (7%).
- 3.15 Further to this is the potential for 'showrooms' on the high street, where customers can view and test products in-store before purchasing online. Examples of these are seen at Westfield Stratford, such as:
- Zara in early 2018 unveiled a new click-and-collect pop-up store. The temporary concept store was launched while the flagship store in the shopping centre was being refurbished. It is the first Zara store to offer a dedicated online section. The new store has been built with click-and-collect orders in mind. The store's design features technology-enhanced elements aimed at elevating the customer experience. Store employees also have mobile devices to aid customers and there is a card terminal system that operates with Bluetooth technology.
 - Similarly car manufacturers Jaguar Land Rover, Tesla, DS and Hyundai have digital showrooms at Westfield Stratford City. Some these also have virtual-reality systems that enable a customer to specify and view a new car in a particular setting.
- 3.16 The above illustrates how retailers are diversifying into from physical store networks to focus more on 'omnichannels'. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of some town centres over time especially since customers compare both online with physical stores whilst seeking an experience with the latter. This may also help drive the demand for retail space from non-traditional retailers such as automotive manufacturers mentioned above.

¹² Usage of Click & Collect by internet shoppers. NEMS Market Research (2016)

Floorspace 'Productivity' Growth

- 3.17 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as, for example, rents, rates, service charges and staff costs) to help maintain their profitability and viability. Practically, this is achieved by increasing the amount of sales (revenue) within a given retailer's available floorspace (measured in square feet or metres).
- 3.18 It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.
- 3.19 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for 'non-store' (SFT) retailing.

Table 3.4 Forecast 'productivity' growth rates

	2014	2015	2016	2017	2021	2026	2020-24	2025-36
Comparison	-2.0%	-1.2%	0.7%	-0.1%	-0.1%	-0.2%	0.0%	0.1%
Convenience	5.4%	5.3%	4.3%	1.3%	0.9%	1.8%	2.3%	2.2%

Source: Figures 4a and 4b, Experian Retail Planner Briefing Note 15 (December 2017)

- 3.20 The forecasts show that the scope for sales density growth is limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock following the shelving of major foodstore expansion programmes by the leading national grocers (i.e. Tesco, Waitrose, Sainsbury's, Morrisons and Asda). Notwithstanding this, the turnover densities of existing foodstores in strong trading locations will inevitably be driven upwards where they are serving catchments that are forecast to benefit from strong population and expenditure growth over the short, medium and long term, and particularly where there is limited or no addition to the floorspace stock.
- 3.21 For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of over +2.3% per annum over the next 15-20 years. However, this is still well below the rate seen during the boom of the early years of this century.
- 3.22 The floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in **Section 10** of this study. It should be noted however that we consider that existing retailers and floorspace will have the potential to achieve higher annual revenue growth rates to absorb increasing costs in order to remain viable, and this is especially the case where opportunities for additional new floorspace is limited.

Changing Retailer Requirements

- 3.23 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 3.24 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) has now shifted to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out¹³. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by food stores in the future.
- 3.25 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have significantly reduced their store portfolio in centres across the UK (e.g. HMV, GAME etc.). Although the number of retailer 'casualties' has slowed over the last 12-18 months, there are still a number of traditional high street retailers that have recently been forced into administration, most notably BHS.
- 3.26 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space. Westfield Stratford in this context is better placed to provide such units. A recent example being H&M's Group newest brand, Arket, is set to open its third store in London at Westfield Stratford. This is in addition to the H&M's flagship 5,000sqm store at the centre.

¹³ For example, in 2015 Tesco disposed of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

- 3.27 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology. As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets (including in Harlow, Great Yarmouth and Rugby) and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave of closures for 2018/19. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.
- 3.28 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

Vacancy Levels

- 3.29 The impact of retail closures in town centres due to administration (beginning with Woolworths in 2008, BHS in 2016, and Jaeger in 2017) and portfolio rationalisation (such as Clinton Cards planned closure of 120 stores in 2017/18, as well closure of all Banana Republic stores in 2017) has led to a dramatic increase in national vacancy rates.
- 3.30 Experian's figures show that the national average vacancy level (expressed as a proportion of total outlets) more than doubled between 2006 and 2013; from circa 7% to 16%. Although vacancy levels have more recently have fallen back to circa 11.2% in 2017, the national average figure 'masks' the reality for different centres and locations, for example:
- Research by the Local Data Company shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more 'healthy' centres, closer to London and the south-east have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull is resulting in vacancy levels of over 20%.
 - Since 2012¹⁴ a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's to early 1990's and more recent sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation, as they adjust their store requirements for the new multi-channel environment.

¹⁴ Jones Lang LaSalle, Property Predictions, 2012.

- In many centres, there can be as many as 25-30% of occupied shops on temporary short-term lets, with little or no rent being paid¹⁵.

3.31 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth¹⁶. In those cases where vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth centres, etc. Another option is 'meanwhile uses/leases', which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Furthermore, local planning authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, area action plans and other planning tools.

Trends in Retail-Led Investment and Development

3.32 The weak UK retail economy, the low growth in retail sales volumes, high vacancy levels and the lack of traditional development funds are all combining with other factors to create a very difficult climate for new shopping centre development and investment. One of the key impacts at the height of the economic recession was to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the downturn in 2007/08.

3.33 The Shopping Centre Development Pipeline Report published by the British Council of Shopping Centres (BCSC) shows that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets (principally in prime and secondary locations) that offer the potential for growth. In terms of new development, three significant schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds); the Old Market scheme in Hereford opened in 2014; and in 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport. Other shopping centre schemes have opened in centres across the UK since 2015, but none are of the scale witnessed during the 'golden age' of shopping centre development between 1997/98 and 2007/08.

3.34 Recent trends suggest that average scheme size is generally smaller than previous schemes (i.e. less than 27,870 sqm), apart from in the larger 'top ranking' cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For

¹⁵ Sourced from Beyond Retail (2013)

¹⁶ London Assembly Economy Committee: Open for Business. Empty shops on London's high streets GLA, March 2013.

example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer.

3.35 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the LLDC's main centres and the delivery of a realistic retail vision. Given that Stratford has been identified with potential for designation as an International Centre, and having potential for regional or sub-regional importance these types of uses are likely to be of significance. Westfield Stratford already has 65 restaurants and this provision is a key attractor to the centre.

3.36 Given that it takes on average over ten years for a town centre scheme to be planned and developed, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Town centre redevelopment is complex and complicated by fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's modern retailer requirements. As a result, local planning authorities will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the BCSC research 'Enabling Retail Development' (2015), which identified the following interventions by local authorities based on their case study research:

- **Investor:** Newport, Sheffield, Oldham, Walsall
- **Developer:** Sheffield, Oldham, Bradford, Walsall
- **Masterplanner/site assembly:** Ealing, Hounslow, Newport
- **Owner and management company:** Woking
- **Public Realm delivery:** Hemel Hempstead, Bradford
- **High Street improvements and grants:** Newport, Hounslow, Bradford

3.37 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 25-50' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres.

So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

3.38 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings, while mindful of avoiding harm to such heritage assets) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators¹⁷ argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

3.39 In terms of significant investment at the local and sub-regional context in and around central London and the City, key retail locations such as Oxford Street; Canary Wharf and Kings Cross, all have competing effects to Stratford as a retailing and leisure destination. The key retail attractions within these areas is listed below:

- **Oxford Street** has four department stores, flagship stores of major UK and international fashion retailers, as well as tourist retail destinations such as Nike Town.
- **Canary Wharf** has expanded as a shopping destination during the week and at the weekends with an M&S Food and Waitrose within the shopping complex. Additionally, the 455,221 sqm (4.9m sq ft) Wood Wharf scheme will see Canary Wharf extended to the east with the addition of 30 new buildings. Completion of the first phase of the plans will coincide with the arrival of Crossrail. This new major district is anticipated to include up to 3,610 new homes, and 176,514 sqm (1.9m sq ft) of office buildings designed to accommodate technology media and telecoms sector as well as financial and professional services firms. It will offer high street retail units to complement Canary Wharf's existing retail offer, as well as affordable housing on site.
- And finally, at **Kings Cross**, a major mixed use scheme is currently under construction (expected to be open in 2020) for over 46,000 sqm of retail and restaurant floorspace, as well as 37,000 sqm for leisure uses. A shopping street known as 'Coal Drops Yard' is also expected to open in October 2018 for approximately 14,000 sqm of retail and leisure floorspace to work alongside other commercial developments.

3.40 Although the Westfield Stratford City regional shopping centre has key advantages over other Central London locations listed above (i.e. the covered shopping environment, car parking, ease of pedestrian movement and security), Stratford will still face competition from other retail destinations. Notwithstanding this, the developing critical mass at Stratford in terms of the new investment in retail and other sectors including UCL East and Stratford Waterfront proposals would create another destination within London to effectively compete against other retail destinations.

¹⁷ English Heritage (2013), The Changing Face of the High Street: Decline and Revival

Independents and Markets

3.41 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure prime locations in town centres. However this does not underestimate or undervalue the important role of small independent shops¹⁸ street markets and associated leisure provision, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. This is already seen in the current and emerging centres within the LLDC area which offer differing unit sizes such as large purpose built floorplates at Westfield Stratford City compared with smaller independent provision at East Village and Here East. Across Hackney Wick and Fish Island there are examples of how large industrial units have been re-purposed for creative and cultural uses which include night-time activities. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called 'clone towns'¹⁹ due to the increasing colonisation of centres by larger chain stores. The homogenisation of the high street is discussed below:

'Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home.'
(New Economics Foundation, Reimagining the High Street, 2010)

3.42 Notwithstanding this, research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).

3.43 In terms of street markets, the 1994 Rhodes Report demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the high street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to 'retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'.

3.44 The Portas Review²⁰ also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first 'Love Your Local Market Fortnight' (LYLM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies.

¹⁸ There is no national definition however the Town Centres SPG defines 'small independent shops' as a shop with a gross floorspace of 80 sqm or less.

¹⁵ New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)

¹⁶ The Portas Review: An independent review into the future of our high streets (2011)

- 3.45 Retail markets therefore continue to make a meaningful and important contribution to towns and cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade; as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the town's residents creating a vibrant and successful market. This will in turn attract visitors from outside the area and increase the value of the market²¹.
- 3.46 Town centres need to be multi-functional with a diverse offer drawing custom for a much wider range of benefits in addition to just shopping. This requires all stakeholders to work together much more effectively to deliver a better collective experience. Hence alongside retailing, the provision of leisure and cultural provision acts as a key footfall attractor to a centre. As detailed in the accompanying report on Creative and Cultural Opportunities²², the LLDC area already has a diverse range of creative activity which is interlinked with cultural assets and the night time economy. These contribute not only to their own sector and the economy as a whole, but also to a sense of place and identity, footfall and appeal of the area to investors and occupiers.
- 3.47 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls together with leisure provision is a difficult balancing act for local planning authorities. It will be a greater challenge going forward with the threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre's offer is not undermined by the new retail brands.

Impact of Out-Of-Centre Retailing

- 3.48 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out of centre locations has not diminished.
- 3.49 Research²³ shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.
- 3.50 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.
- 3.51 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods²⁴ retailing to the provision of larger stores selling fashion

²¹ Recent research documents supporting the benefits of markets can be found via the following link:
<http://www.nabma.com/publications/research-documents/>.

²² LLDC Creative and Cultural Opportunities Assessment (March 2018) – Part of the wider LLDC Combined Economic Study

²³ Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival

²⁴ 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.

and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).

- 3.52 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.
- 3.53 In the context of the draft London Plan (2017) especially in terms of increasing housing supply, Policy H1 recommends mixed use redevelopment of car parks and low-density retail parks. However, as the accompanying narrative to this policy expounds²⁵, this should not generally result in an increase of retail floorspace taking account of town centres first approach the sequential approach and impact assessments where appropriate. In our opinion this type of residential development is usually above the existing retail provision and typically where the retail park has had persistent vacant units or is failing generally. This provision does not detract from the town centres first approach and the agglomeration and accessibility benefits associated with town centres.

Summary

- 3.54 This section has illustrated that existing floorspace in town centres faces a myriad of challenges. These will continue to grow over the short, medium and long term. This notwithstanding, for the centres within LLDC to perform strongly they will need to embrace the new dynamics and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical 'store based' retailing in town centres.
- 3.55 There are positive signs that the UK is emerging from the shadow of the longest and deepest economic downturn in living memory, but it is clear that our town centres and high streets post-recession are under pressures to simply retain retail businesses, let alone attract new investment and development.
- First, although the economy in general, and retail sector in particular, is forecast to experience growth over the short to medium term at least, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit and other global uncertainties arising from international politics.
 - Second, the growth of online shopping is impacting on the vitality and viability of many of Britain's centres and high streets.

²⁵ Para 2.8.3 – Draft London Plan 2017

- Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres - and particularly historic centres - to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky goods' conditions on existing retail parks.

3.56 Within the LLDC Area, there will be a need to build in resilience to the changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres.

3.57 These trends, and others, are also placing pressures on rental growth and market demand in many centres, particularly the smaller secondary centres and market towns outside the 'top 25-50' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores²⁶.

3.58 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:

- At one end of the spectrum the larger, more dominant 'top 25-50' **cities and towns** should strengthen their competitive position. Because of their scale and catchment populations they will continue to attract market interest from high profile domestic and international retailers seeking space, as well as from commercial leisure operators.
- At the other end of the spectrum the smaller **local and neighbourhood centres** will be less affected. They are principally meeting the everyday retail (food), service and community needs of their local ('walk-in') resident catchment populations. It will therefore be important for local planning authorities to protect the important offer, role and function of these smaller centres. In the context of the LLDC area, new local or district centres are important in the regeneration of an area. A network of local centres will support the current Metropolitan centre. To promote a thriving centre will require a mix of complementary and integrated provision. This must include residential provision, an active retail area that provides for all the basic needs of its immediate residents, services, community facilities and within a high quality public realm. The integration of provision will help protect the vitality and economic viability of a local centre making it an attractive place to live.
- It is the **medium-sized towns and centres** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the

²⁶ Javelin Group (October 2011), 'How Many Stores Will We Really Need?'

wrong location to meet today's retailer requirements. The challenge for local planning authorities will therefore be how to revitalise and regenerate these centres, looking beyond retail as a key driver for growth.

- 3.59 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities). This is because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.
- 3.60 Therefore those shopping locations that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations, with good accessibility, etc.) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than compete with the centre's existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre's overall vitality and viability.
- 3.61 In this context, it is clear that the 'top 25-50' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing local planning authorities will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.
- 3.62 This provides the important background and context for assessing and understanding the potential for new retail investment and development in the LLDC area over the short, medium and long term.

4. TOWN CENTRE HEALTH CHECK: METHODOLOGY

4.1 **Sections 5 to 9** provide detailed health check assessments for the main centres in the LLDC area, as follows:

- Stratford (**Section 5**)
- Bromley-by-Bow (**Section 6**);
- Hackney Wick (**Section 7**);
- East Village (**Section 8**); and
- Pudding Mill (**Section 9**).

4.2 Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

4.3 In accordance with the PPG (paragraph 005), there are a number of Key Performance Indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the KPIs include:

- the scale and diversity of uses (e.g. retail and services offer);
- retailer representation and demand;
- commercial property indicators (such as Prime Zone A Rents);
- changes in vacancy levels;
- accessibility and parking provision;
- the quality of the town centre environment;
- pedestrian footfall; and
- customers views and behaviour.

4.4 In this case the most reliable KPIs have been gathered (where available²⁷) for the centres to help inform the assessment of their overall strengths and weaknesses in terms of their retail and leisure provision, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability. We have referred to a number of datasets and research to help assess the relative vitality and viability of the LLDC’s main town centres, as referenced throughout the report. The general methodology is set out below.

4.5 It should be noted that the centres of Stratford; Bromley-by-Bow; Hackney Wick; Pudding Mill and East Village, as defined in the LLDC Local Plan, also fall within boundaries of other London Boroughs. Although the health checks take the whole area into account, numerous planning policy (i.e. shopping frontages and shopping areas) will be referred to throughout the analysis. The constituent centre and associated London Borough is listed below:

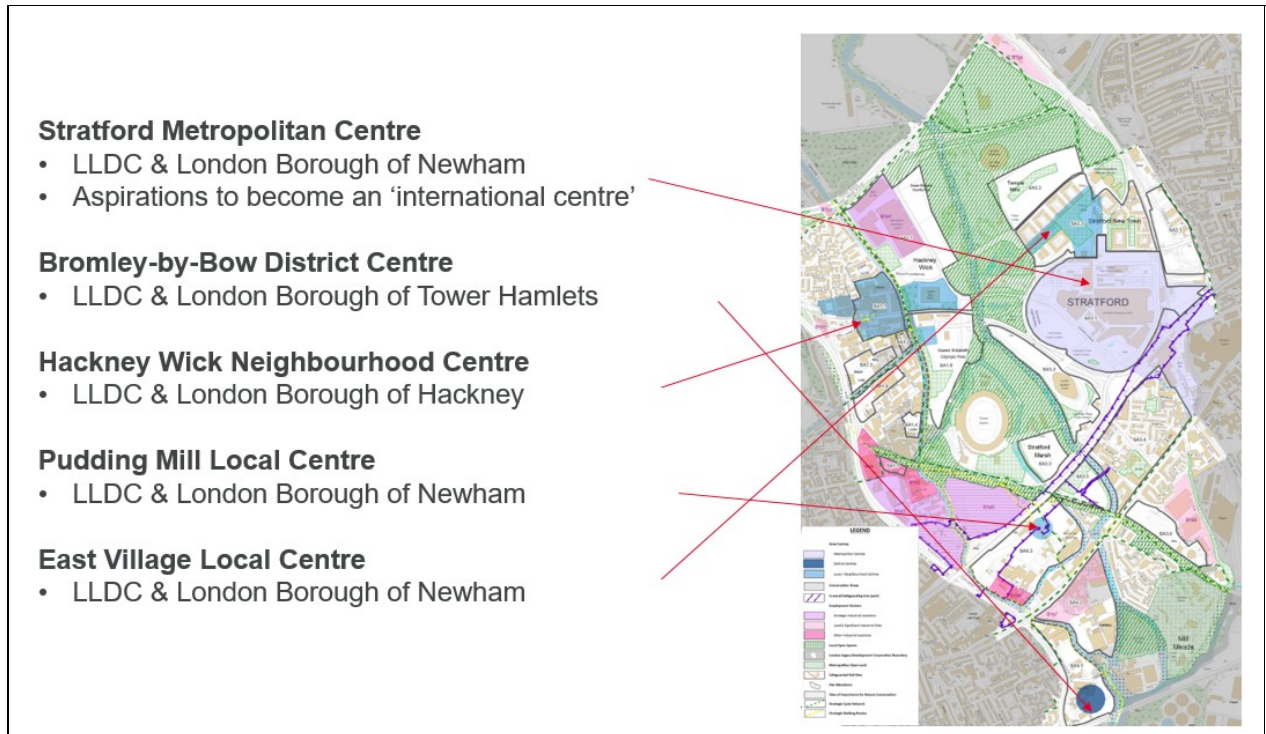
- Stratford Metropolitan Centre – London Borough of Newham

²⁷ It should be noted that due to the paucity of data for smaller centres, it is not possible to provide the breadth of data on performance of centres.

- Bromley-by-Bow District Centre²⁸ – London Borough of Tower Hamlets
- Hackney Wick Neighbourhood Centre²⁹ – London Borough of Hackney
- Pudding Mill Local Centre³⁰ – London Borough of Newham
- East Village Local Centre – London Borough of Newham

4.6 **Figure 4.1** illustrates the designated centres within the LLDC boundary.

Figure 4.1: Designated Centres in the LLDC Boundary



Source: London Legacy Development Corporation Local Plan Policies Map (2015)

Engagement of Key Stakeholders

4.7 As part of the town centre health checks, we have consulted with a range of key stakeholders. The table below shows the key stakeholders with whom a successful engagement was held.

Table 4.1 Stakeholders Consulted

Stakeholder Function
Stratford Shopping Centre Manager (Stratford)
East Wick and Sweetwater Projects (Hackney Wick)
Town Centres Team at Tower Hamlets (Bromley-by-Bow)

²⁸ To be noted that this centre is not yet established and will be delivered through development.

²⁹ To be noted that this centre is not yet established and will be delivered through development.

³⁰ To be noted that this centre is not yet established and will be delivered through development.

Retail Composition & Diversity of Uses

- 4.8 The town centre health check assessments have been informed by previous retail studies for the various local planning authorities. These have set out the number and proportion of units in each use classification across the centres (i.e. convenience, comparison and service uses, and vacant units).

Vacancies

- 4.9 The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of retailer demand and/or the fact that vacant units are not meeting demand and are not 'fit-for-purpose'. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with care.
- 4.10 The data for vacancies has been collected from the previous retail studies, and commentary has been provided on the vacancy data as surveyed by the LLDC.

Multiple and Independent Retailers

- 4.11 We have also provided analysis on multiple retail representation. A multiple is defined as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a town centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.

Street/Covered Markets

- 4.12 Whether or not a centre has a market, and the quality and offer of a market, can give an indication as to whether a centre is vital and viable. Information regarding the health of the markets discussed in this report has been obtained from our own research and observations of the centres, as well as stakeholder consultation. In line with Paragraph 23 of the NPPF, existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive.

Retailer Demand & Requirements

- 4.13 Evidence of requirements ('market demand') from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case we have drawn on standard published sources to inform our assessment of current market demand; including the Requirements List. However, it should be noted that this published information is not definitive, as many retailers and leisure operators prefer not to announce their requirements as it can undermine their negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven; for example in response to the marketing of new development and regeneration initiatives.

Prime Zone A Rents

- 4.14 The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents was only available for Stratford and Westfield Stratford City, and not the other centres.

Environmental Quality

- 4.15 Environmental quality represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. An assessment of environmental quality (including cleanliness and attractiveness, security, treatment of buildings and open spaces) has been undertaken using our own research and observations of the centres, as well as stakeholder consultation.

Accessibility

- 4.16 A centre's vitality and viability can also be impacted by the ease of accessibility by different modes of travel, and the level and quality of car parking. This assessment has been informed by the survey evidence, along with our own research and observations of how easy a centre is to access; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes. Consultation with key stakeholders has supplemented our research.

Out-of-Centre Provision

- 4.17 Out of centre provision has been determined using a number of sources. For example, Completely Retail³¹ is a comprehensive retail database, has been referenced to identify the location, scale and operators trading outside of the main centres. We have also referred to the results of the household survey and consultation with key stakeholders.

New Investment & Potential Development

- 4.18 Carter Jonas has relied on the LLDC to identify new investments and potential developments within the LLDC defined area. This has also been supplemented by consultation with key stakeholders, as well as a review of relevant planning history.

³¹ A data source which includes information on every shopping centre and retail parks in the UK.

5. STRATFORD HEALTH CHECK

Context

- 5.1 Stratford Metropolitan Centre is formed of two parts: the 'traditional' Stratford Old Town to the South East; and the 'new' Westfield Stratford City to the North West. As a whole, the Metropolitan Centre consists of large and small scale retail and commercial leisure uses, Grade A office space, food and beverage uses for the night-time economy, and a subsidiary residential area focused around the transport hub.
- 5.2 Stratford is located 5 km (3 miles) from East Ham and Ilford, 8 km (5 miles) from Barking, and 12 km (8 miles) from central London centres. Stratford is served by the Stratford Station, Stratford International Station and the Stratford Bus Station.
- 5.3 It should be noted from the outset that due to the way town centres function and operate, this health check assesses Stratford Metropolitan Centre as a whole and analyses both the Stratford Old Town (including the Stratford Centre) and the new Westfield Stratford City Shopping Centre. Although the Old Stratford Centre shopping centre is designated as a Primary Shopping Area (PSA) in the Newham Local Plan Policies Map (2016) and is not within the LLDC boundary, we provide commentary on Stratford as a whole and the surrounding areas where relevant.
- 5.4 Westfield Stratford City is ranked 26th in the 2017 Javelin Venuescore³² ranking of all town and shopping centres and is therefore within the top 30 centres nationally. In contrast, 'traditional' Stratford is ranked 326th which is a marginal improvement from 2007 when it was ranked 335th. The differences in rankings highlights the disparity between the two areas. **Table 5.1** outlines the nearby competing centres and their rankings. Stratford Metropolitan Centre as a whole is performing relatively well against nearby centres.

Table 5.1: Competing Centres

Town Centre	Venuescore Rank
London, Westfield Stratford City	26 th
London, Ilford	115 th
London, East Ham	326 th
London, Stratford	326 th
London, Barking	343 th
London, Hackney	355 th
London, Greenwich	579 th

Source: Javelin Venuescore (2016)

- 5.5 Based on our assessment, the main composing areas can be described as follows:

³² Venuescore is Javelin Group's annual ranking of the UK's top 3,000+ retail venues based on provision of multiple retailers including anchor stores, fashion operators, and non-fashion multiples, where each operator is given a weighted score to reflect its overall impact on shopping patterns and the attraction of centres. The Market Position Index measures the degree to which the centre's offer has a high-end or discount focus (High=Bias towards High-end retailers; Low=Bias towards Discount-oriented retailers)

Traditional Stratford

- **The Stratford Centre** is a main shopping centre within Stratford. It is opposite the Stratford railway station and bus station. It opened in 1974 and consists of 62 retail units. It has a range of services from banks, clothing and fashion, food and drink, health and beauty, sport and leisure and technology, including brands such as: Lidl, Barclays, Boots, Costa Coffee, Sports Direct, The Body Shop, Argos and Peacocks. Although most of the shops close at night, the centre has 24-hour access public highway that runs through the middle of the centre.
- **The High Street / Broadway:** This street hosts a number of main town centre uses including banks, (such as Lloyds and Natwest), and other budget retailers including Argos, BrightHouse, Wilko and Poundstretcher. Along the High Street there are a number of independent food and beverage venues.

Westfield Stratford

- **Westfield Stratford City** opened in 2011. It has a total retail floorspace of over 170,000 sqm and consists of retail, food, hotel, leisure and entertainment, office and professional services. It is the third largest shopping centre in the UK (in terms of retail floorspace), and one of the largest urban shopping centres in Europe with over 250 shops, 70 bars, an All Star Lanes bowling, Gymbox and Aspers Casino. It is expected to generate 10,000 gross direct jobs over the period to 2031. The shopping centre lies adjacent to the Queen Elizabeth Olympic Park, East Village and Stratford stations. Major multiple retailers which anchor the shopping centre include: John Lewis; Waitrose; M&S and a Vue cinema. It also has a range of high end luxury fashion retailers such as Breitling, Kurt Geiger and Mulberry. In 2016, Westfield Stratford City totalled a footfall of 27.3 million and retail sales of £996 million³³. This illustrates the level of success generated and disparity between the Stratford Centre.

Retail Composition & Diversity of Uses

5.6 **Table 5.2** summarises the composition of the retail mix in terms of units and floorspace. This table does not include Westfield Stratford City (see below) and focuses on the role and function of the 'historic' town centre.

Table 5.2: Retail and Service Composition at 2016 (Stratford Old Town)

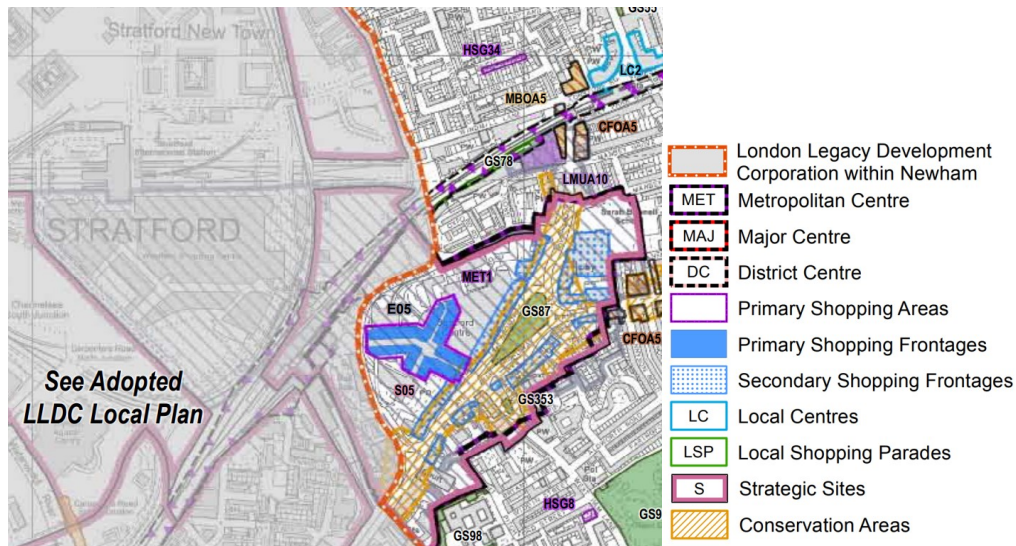
Category	% of Total Outlets	UK Average 2016 %
Convenience	8.1%	8.7%
Comparison	27.4%	31.3%
Service	56.4%	47.5%
Vacant	8.1%	11.3%
TOTAL	100.0%	100.0%

Sources: Newham Retail Study Update (2016) and desk based research

³³ Completely Retail (2016)

- 5.7 In terms of Westfield Stratford City, the LLDC's monitoring data for 2017 shows there were 340 outlets in total (262 - A1, 6 - A2 and 72- A3). Additionally there were 18 vacant units representing a vacancy rate of 5.3%. This vacancy rate is lower than the 8% recorded in 2014.
- 5.8 To note the above data was sourced from the Newham Retail Study Update (2016), and therefore covers the area outlined in **Figure 5.1** below.

Figure 5.1: London Borough of Newham Local Plan Policies Map (2016)



Source: London Borough of Newham (2016)

Convenience Offer

- 5.9 **Stratford Old Town:** In terms of convenience goods within traditional Stratford, the percentage of the total outlets (8.1%) is broadly in line with the current national average (8.7%). Since the Newham Retail Study (2010)³⁴, the number of convenience retailers increased from 13 in 2010 to 15 in 2016. Key anchors and multiple retailers include Sainsbury's and a Lidl, as well as a Morrison's located on Romford Road. Two independent supermarkets (the Loon Fung Oriental Foods and Lituanica) are also located in the Stratford Centre. The Stratford Centre continues to remain a strong role for ethnic food retailers, which has strengthened since the opening of Westfield. This was reaffirmed through our consultation with key stakeholders.
- 5.10 **Westfield Stratford:** Within Westfield Stratford City, there is an M&S (Food on the Move) which also provides hot food takeaway and the ordering of flower and plants; food; wedding / personalised cake; hampers and wine. There is also a Waitrose (inside the John Lewis) which has a range of food counters providing: fish; cheese; delicatessen goods; an olive bar; meat and baked goods.
- 5.11 As a whole, Stratford is further supplemented by three different street markets (including the Stratford Indoor Market, Stratford Outdoor Market and the Grove Market). There is a range of grocers and delicatessens within these markets, selling a range of fresh produce. There are also: bakers and confectioners (including the Percy

³⁴ Source: Newham Retail Study (2016)

Ingle Bakery and Greggs in the Stratford Centre); butchers (including the Dewhurst Butchers in the Stratford Centre); and health foods (including a Holland and Barrett in Westfield and the Stratford Centre).

- 5.12 In summary, we consider the convenience offer in Stratford is strong as there is a variety of supermarkets that offer a range of food retail from value-led to higher-end groceries.

Comparison Offer

- 5.13 In terms of comparison goods, Stratford has 27.4% of comparison units which is below the current national average of 31.3%. Based on available data, this is reflective of the traditional part of Stratford and not Westfield Stratford City. However in totality the Metropolitan Centre encompassing the Westfield Stratford City part provides an extensive offer ranging from budget to higher end goods. In terms of Stratford's overall non-food provision, the key headlines are summarised below.

- 5.14 **Stratford Old Town:** Across the sub categories, the Stratford Centre offers a range of comparison retail including: women's and men's fashion; jewellery; beauty; sports and department store. The Newham Retail Study (2016) identified a total of 92 multiple retail units, of which 40% were comparison goods retailers, including Dorothy Perkins, New Look, Carphone Warehouse, Clarks, O2, Superdrug; Phones 4U; JD Sports; H. Samuel; Lidl; Argos and Peacocks. Since the Newham Retail Study (2010) however, the number of comparison retailers in the traditional part of Stratford has fallen from 60 in 2010 to 51 in 2016 (including multiples such as Forever 21). Overall, the offer in the Stratford Centre is considered to be in the lower to mid-market category. Our engagement with key stakeholders identified this as a trend which has accelerated since the opening of Westfield Stratford. As a result, the traditional part of Stratford has consolidated as a lower/middle order function, with Westfield Stratford operating as a middle/upmarket comparison offer.

- 5.15 **Westfield Stratford City:** In contrast, Westfield Stratford City has a far greater range of comparison retail ranging from: bags and luggage; books, cards and gifts; department stores; entertainment; fashion; health and beauty; jewellery and watches; luxury retailers; photography and art; pets; shoes; sport and fitness; technology; and toys and hobbies. The centre comprises approximately 175,000 sqm gross A1/A2/A3 retail and leisure floorspace, three hotels and c.100,000 sqm of office floorspace. Westfield Stratford City is currently Europe's largest urban shopping and leisure destination. The centre has over 250 shops, 65 bars and is anchored by John Lewis, Marks and Spencer, Waitrose, Vue Cinema in addition to All Star Lanes bowling, Gymbox and Aspers Casino. In 2017, Westfield Stratford City achieved footfall of 49.5 million³⁵.

- 5.16 In summary, the Metropolitan Centre as a whole provides a broad spectrum of both convenience and comparison goods retailing. We would consider that there is a clear complementary role and function between the two parts.

Service Offer

- 5.17 The service offer across both parts of the town centre is distinct as detailed below.

³⁵ Source: Drapers 'Westfield reports flat UK sales' – 22/02/2018

5.18 **Stratford Old Town:** The overall service offer within the traditional part of Stratford remains higher than the national average with 56.4%. We consider the range across retail, leisure and financial services to be a good representation.

- With regards to **retail services** the range includes: dry cleaners (including independent operators outside the policy boundaries); travel agents; banks (including Halifax; HSBC; Lloyds and Santander); and betting shops.
- For **leisure services**, there is the following: cafés (including independent operators such as Best Café and Gerry's Kitchen and multiples such as Starbucks and Costa Coffee); restaurants (including fast food restaurants (such as McDonald's, Chopstix Noodle Bar and Pizza Express); public houses and drinking establishments. These are scattered throughout the Stratford Centre and the Broadway.
- Finally, with regards to **financial services**, there is the following: a currency exchange service; financial advisors; as well as the Money Shop. Overall, the quality of these services is reflective of the area which can be considered to be of lower provision in contrast to Westfield Stratford City.

5.19 **Westfield Stratford City:** Within Westfield Stratford City, there is a wider array of high quality of service provision. This aligns to the wider trends in shopping centres in which services are taking a prominent role in the overall offer and experience.

- For **retail services**, there are dry cleaning services (located in the shopping centre and in Waitrose), banks (including HSBC, Barclays and Nationwide), car washing and valeting, a gym, an optician, salons, a travel agent, as well as personal shopping.
- Amongst the **leisure services**, there is an evolving range of events and competitions, a multi-screen Vue cinema, All Star Lanes Bowling, a Casino as well as a range of restaurants with various cuisines including: Balan's Soho Society; Tortilla; Giraffe; Wagamama and YO! Sushi.
- And finally, with regards to **financial services**, the offer is fairly limited as the centre largely caters towards the shopping and leisure experience. There is a currency exchange service which inevitably serves tourists.

5.20 In overall terms, we consider there is a good provision of services. The addition of Westfield Stratford City significantly boosted the service level offer, particularly the range of food and beverage amenities. Similar to the convenience and comparison offer, there is a complimentary offer between Old Stratford (lower end services) and Westfield Stratford City (higher quality services).

Vacancies

5.21 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time.

5.22 Since the Newham Retail Study (2010), vacancies have increased in Stratford Old Town, but this level still remains below the national average. According to this study, the 2016 vacancy rate stood at 8.1% compared to the national average of 11.3% at that time.

Table 5.3: Vacant Units and Floorspace in Stratford Old Town

	Vacant Units	% of Total	2016 GOAD UK Average
Number of Units	15	8.1%	11.3%

Source: Newham Retail Study Update (2016)

- 5.23 Within Westfield Stratford City, and according to the LLDC's monitoring data, the most recent vacancy rate recorded in 2017 was at 5.3%. It is noted that the lowest vacancy rate was in 2015 at 3.2%.

Table 5.4: Vacancy rate in Westfield Stratford City

Year	Vacancy Rate (%)	London Average (%)
2014	8.0%	8.1%
2015	3.2%	4.3%
2016	6.2%	8.4%
2017	5.3%	7.5%

Source: LLDC Survey Data (2017)

- 5.24 The vacancy rates across the whole of Stratford are lower than national average. The lower rate of vacancy can be attributed to active asset management under one ownership complemented by critical mass of national and independent retailers. The latter serve a broad consumer base offering a diverse product range and meet the needs of shoppers and visitors seeking a destination shopping experience.

Multiple and Independent Retail Representation

- 5.25 There is a very good quality and representation of multiple retailers across the overall Stratford area. The Newham Retail Study Update (2016) identified that within Stratford Old Town, of the 92 multiple retailers trading in the centre, 40% are occupied by comparison goods retailers. These included brands such as: Dorothy Perkins, Carphone Warehouse, Clarks, O2, Superdrug and Phones 4U. Within the Stratford Centre, the representation consists of the lower to mid-market retailers such as Poundland; Blue Inc and Argos. In contrast Westfield Shopping Centre has a strong representation of multiples including a number of national multiple brands such as Aldo, Boots, Cath Kidston, Dune and FatFace, as well as high end luxury fashion retailers such as Breitling, Kurt Geiger and Mulberry.
- 5.26 In summary, the role and function of both Stratford Centre (lower to middle market budget retailing) and Westfield Shopping Centre (middle to upper market retailing) offers a unique shopping offer and destination.

Street Markets

- 5.27 Street markets are primarily confined to the Stratford Old Town. The Stratford Centre holds a traditional east-end market ('Stratford Indoor Market') with over 30 stalls that sell a range of goods for the local community. These include: fresh fruit and vegetables; flowers; fresh seafood; new clothing; sweets; music; mobile accessories; lingerie and nightwear. The Stratford Indoor Market is open from Monday to Saturday (9am to 5pm). It is one of the oldest in the area where families have been trading since 1925. Before it moved to the Stratford Centre in 1974, it was located across Stratford High Street, Stratford Broadway and Angel Lane.
- 5.28 Separately, the 'Stratford Outdoor Market' is located on The Broadway and sells a range of goods including: hot and cold food; hosiery; toys; hand-made jewellery and crafts; and CDs. The trading hours are 9am to 6pm

(Tuesday to Saturday). The Stratford Outdoor Market has apparently been trading for decades with some stallholders trading for over 15 years. It lies adjacent to historic buildings such as St John's Church and Old Town Hall.

5.29 Finally, the 'Grove Market' is the newest market in Stratford which began trading in October 2015. It sells a range of household goods such as furniture and bedding, as well as food including fresh and frozen fish, hot and cold food with cuisines such as jerk chicken and Bulgarian food. The trading hours are 9am to 6pm, Tuesday to Saturday.

Retailer Demand & Requirements

5.30 There are 42 operators with published requirements for representation in Stratford (outlined in **Appendix 3**). Of these 26 are A1 retailers with an equivalent floorspace requirement of 13,345 sqm gross. It should be noted that the requirements list does not distinguish between traditional and Westfield Stratford. Judging by the list of retailers it has to be acknowledged that these are more typical of high streets and in this way suited to the traditional part rather than the targeted higher end provision at Westfield Stratford City.

Table 5.5: Retailer Requirements

No.	Category	Operator	Sqm
1	Adult Gaming	Admiral Slots	280
2	Alternative Remedies	Revital	100
3	Barbers	Hotshots	65
4	Beauty Salon	Beauty4You	90
5	Bed retailer	Bensons for Beds	695
6	Bike Shop	Cycle Republic	555
7	Budget Retailer	Poundworld	1,860
8	Charity	Crisis	200
9	Charity	British Heart Foundation	740
10	Charity	Sue Ryder	740
11	Cosmetic treatments	Skin+Laser	80
12	E-Cigarette Retailer	Cigara	75
13	Electronic Cigarettes	Vaporized	165
14	Escape Room	Fox in a Box	650
15	Fashion Shoe Retailer	Supergal	75
16	Food retail	Lidl	2,780
17	Footwear Retailer	Jones Bootmaker	110
18	Handbags and Accessorises	Bags Etc.	160
19	Kitchens	Magnet	930
20	Optician	European Optical Chain	80
21	Perfume Shop	The Fragrance Shop	140
22	Sweet Shop	Papabubble	650
23	Tile and Wood Flooring Specialist	Topps Tiles	740
24	Tile, bathroom Products	Al Murad Tiles	740
25	Tools and Building Supplies	Toolstation	460
26	Women's Fashion	Little Mistress	185
Sub Total			13,345

Source: The Requirement List (2017)

5.31 In summary, there is significant interest within Stratford with a larger amount of gyms; charity shops; hotels; homeware categories. Major brands include Magnet; Ben's Cookies; Lidl; Poundworld; Five Guys; Sue Ryder; British Heart Foundation and Hub (under brand of Premier Inn).

Prime Zone A Rents

5.32 The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. As at mid-2017 agent sources estimated prime rents in 'traditional' Stratford at £1,399/sqm (£130/sqft) Zone A. This represents no change since mid-2013.

Environmental Quality

5.33 Based on our health check of the town centre we consider that 'traditional' Stratford has a reasonable to good environmental quality. It is generally clean and tidy throughout and has an adequate provision of street furniture with planting, street lighting and litter bins distributed across the centre.

5.34 The active frontages on the Broadway / The High Street contribute to the overall vitality of the area. However, the traffic around this area could be considered intimidating to the pedestrian. To assist in the safety of pedestrians, crossings are provided at numerous points along the street. The Gurney Memorial (in remembrance of Samuel Gurney) in Stratford Broadway consists of a tall granite obelisk acts as a point of reference for the pedestrian. It also contributes to the sense of place. Furthermore, the facade improvements and use of public art outside the Stratford Centre contribute to overall appearance and vitality of the town centre.

5.35 Westfield Stratford city is a purpose built shopping destination centre that is actively managed and has a welcoming environment. The centre acts as a draw and benefits the Metropolitan Centre as a whole.

Accessibility & Pedestrian Flows

5.36 Stratford has a PTAL³⁶ rating of 6b and is located in Zones 2/3. There are 18 buses which operate from the Stratford bus station which all have multiple routes, including services to Oxford Circus (Route 25), Romford (Route 86) and Canning Town (Route 69). Public coach services also operate with National Express with services between Stratford town centre and Stansted Airport, Cambridge, Ipswich/Colchester and Norwich/Thetford. A Terravision coach service also runs between Stratford town centre and Stansted Airport.

5.37 Stratford rail station is served by the following TfL lines: Central; DLR; Jubilee; and the London Overground. The TfL rail services provide connections from Kent and London St Pancras, as well as from Essex, Hertfordshire, East Anglia and Liverpool Street/Fenchurch Street. Stratford will also be served by the Elizabeth Line which has the potential to bring forward growth and development from Stratford eastwards. This will be open in 2019. Stratford as a centre has changed immensely since the 2012 Olympic Games and transport has been a key factor in this growth.

³⁶ This is a measure which rates locations by distance from frequent public transport services.

- 5.38 Pedestrian flows are good throughout Stratford. Westfield Stratford City is fully pedestrianised and provides links between Stratford Station, Stratford International Station and the QEOP. The Stratford Centre also has a public highway running through which is open 24 hours a day. It provides links from the station to the high street.
- 5.39 At the time of our site visit, the highest concentration of pedestrian activity was concentrated outside the Stratford Centre, the Stratford Bus and Rail Station and the entrance to Westfield Stratford City Shopping Centre.
- 5.40 Work has also begun on a radical transformation of Stratford town centre which will see the existing one-way system being scrapped. Under the £17.9m Stratford Gyratory Project, two-way traffic will be introduced around Stratford Centre, improving bus services and providing better facilities for pedestrians and cyclists. Cycle lanes will be introduced and pavements widened. Also planned are verdant public spaces and improvements to the public realm.
- 5.41 Taxi facilities are also provided in Stratford with services including Uber, Stratford City Cars, Radio Taxis, One-Number Taxi, Computer Cab, Dial-a-Cab, Call-A-Cab and London Black taxis.
- 5.42 There are over 500 secure cycle parking spaces at Westfield. Stratford also benefits from the Santander Cycles³⁷. The nearest docking station is located at Stratford Station on Montfichet Road, opposite the entrance to Westfield Car Park B. The car parking facilities are listed in Table 5.6 below:

Table 5.6: Car Parking in Stratford

Car Parking in Stratford	Details
Stratford International Car Park	24/7 with daily and season tariffs
Westfield Car Park (A, B, C)	Car Park B open 24/7
Grove Crescent Car Park	Not available

Source: Westfield Stratford City

Out of Centre Provision

- 5.43 The **Leyton Mills Retail Park** is located north east of Stratford centre. The tenants are primarily within the bulky goods retailers or large format retailers categories (including B&Q and Currys/PC World); fashion retailers (including Next; Sports Direct and TK Maxx); leisure facilities (including Fitness First); associated restaurants and cafés (Pizza Hut; Burger King; KFC; Subway and Costa); as well as a Carphone Warehouse and Poundland. The total size of the retail park is 14,255 sqm.

New Investment & Potential Development

- 5.44 Stratford in the draft New London Plan (2017) is designated in the future potential network classification as 'international centre'. Contributing to this has been the growth witnessed both in terms of residential and commercial floorspace. This is set to increase further and the following represent significant extant planning permissions (also detailed at **Appendix 4**):

³⁷ Santander Cycles is London's self-service cycle hire scheme and more information is available on Transport for London's website.

Stratford City Permission

- **10/90641/EXTODA – Stratford City Site** - This is the overarching planning permission that pertains to the Stratford City Site that consist of five zones. The permission comprises the comprehensive mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link. To note that this permission also covers development in the East Village and Cherry Park area(s) of the site (as detailed at **Appendix 4** for reference). There is a specific permission for Cherry Park (15/00358/OUT) which is listed separately below and which represents Zone 1 of the permission). The future anticipated retail floorspace provided by the LLDC is as follows:

Under Stratford Metropolitan Centre

- **Zone 1: 15/00358/OUT - Stratford City Site - Cherry Park, Stratford City, E20 1EJ.** (Resolution to grant but pending final decision). Residential floorspace (up to 105,000 sqm GEA and commercial floorspace of up to 3,300 sqm GEA; and full planning application for 10,902 sqm (GEA) Class A1 retail anchor store as an extension to Westfield Stratford City (of which 1,814 sqm GEA is existing).
- **Zone 2: (International Quarter):** 2,438 sqm gross at Stratford Metropolitan Centre (including 1,495 sqm gross currently under construction).
- **Zone 3:** Hotel development under construction at N17 including supporting ancillary retail of 2,481 sqm gross (for A3/A4 uses).

Other Stratford

- **17/00032/FUL - Westfield Stratford City, Montfichet Road, Queen Elizabeth Olympic Park, Stratford, E20 1EJ (Resolution to grant but pending final decision).** Extension to Westfield Stratford City (Phase 2) via the Removal of Level 10, Change of Use from Car Parking to Retail (Use Classes A1-A4 14,532 sqm GIA). These form part of Westfield's plans to extend the retail floorspace. The final decision on this application is pending.

Legacy Communities Scheme

- **10/90641/EXTODA** – This permission covers a large part of the Stratford Metropolitan Centre boundary and East Village. Specifically, permission was granted for the variation of conditions of the Planning Permission 07/90023/VARODA to allow an additional 10 years to submit reserved matters and implement Westfield Stratford City Development comprising of the following: mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link.

5.45 These represent significant permissions in the context of future development and the commercial retail and leisure provision and profile of Stratford Metropolitan Centre and the LLDC area generally.

Summary

5.46 In summary, the health check assessment has demonstrated that overall Stratford is a healthy centre that is viable and vital. The key strengths and weaknesses of the centre are summarised below:

Strengths:

- Stratford has a range of convenience retailers within both the 'traditional' Stratford Centre and 'new' Westfield Stratford City which collectively cater to a diverse range of customers. Stratford also has a range of independent convenience operators and independent supermarkets in the Stratford Centre. In broad terms, 'traditional' Stratford is a day-to-day convenience/comparison goods shopping destination (aided by the footfall generated by the market) with a middle to lower-order qualitative function in contrast to 'new' Stratford that caters for a more middle to upper-market mix of operators.
- The comparison shopping on offer is diverse. It includes a number of national multiple brands, as well as high end fashion retailers. 'Traditional' Stratford Centre and 'new' Westfield Stratford City complement each other as they provide different types and quality of shopping and services. Westfield Stratford acts a key draw for shoppers from across London and beyond. In this way, it is already serving and providing both a 'high-order comparison and specialist shopping' – part of the definition for an 'International' centre in the London Plan³⁸.
- 'Traditional' Stratford hosts three different street markets (including the Stratford Indoor Market, Stratford Outdoor Market and the Grove Market). There is a range of grocers and delicatessens within these markets, selling a range of fresh produce. These contribute to the civic pride of the community and provides a positive contribution and uniqueness to the centre.
- The space between the Stratford Bus Station, Stratford International Station, Stratford Centre and Westfield Stratford City is clear for users to navigate. The public art located near the Stratford Centre contributes to the overall environmental quality of the area and provides the user with a sense of place.
- The Stratford Gyrotory project will further aid traffic and pedestrian flows across the centre.
- Stratford has a PTAL³⁹ rating of 6b, served by 18 different bus routes and an International rail Station. The addition of the Elizabeth line will also dramatically improve the accessibility of the area. This will boost the accessibility of Stratford even further.

³⁸ Draft London Plan (2017)

³⁹ This is a measure which rates locations by distance from frequent public transport services.

Weaknesses:

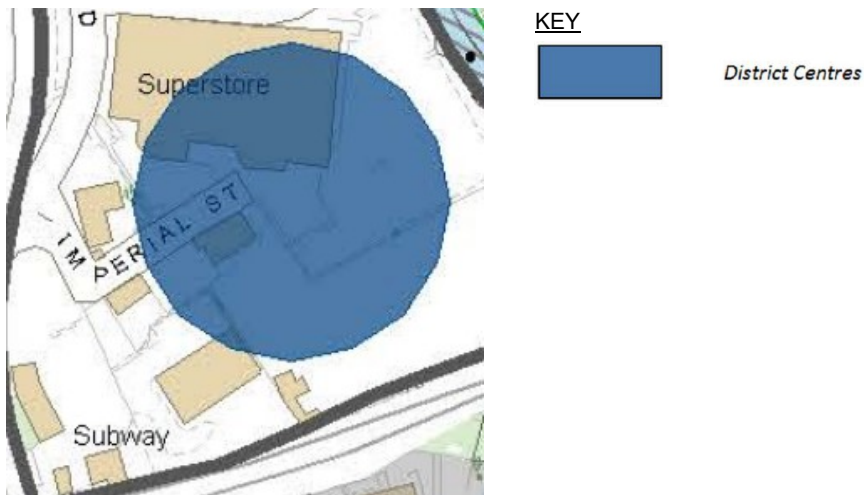
- Although the old Stratford Centre and Westfield Stratford City complement each other by the variation in shopping and services provision, 'new' Stratford could potentially dominate the more 'traditional' part in terms of the provision resulting in potential polarisation of two parts.

6. BROMLEY-BY-BOW HEALTH CHECK

Context

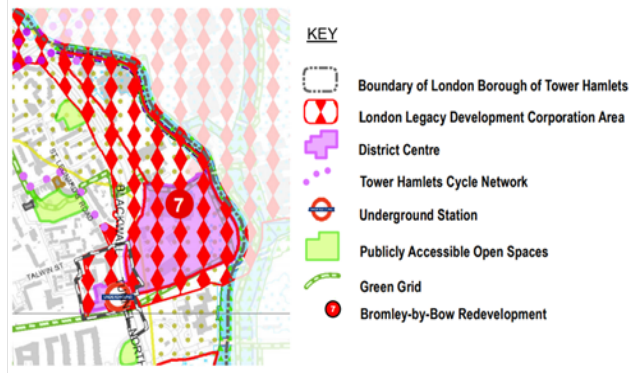
- 6.1 Bromley-by-Bow is located in the southern edge of the LLDC boundary and is the area between Three Mills Lane, Hancock Road, the River Lea and the existing tube/rail line.
- 6.2 It should be noted that Bromley-by-Bow is a potential future District Centre within the LLDC area. As at this stage it is not functioning as a centre. The broader LLDC vision is to regenerate this area and to expand town centre uses as well as the addition of a new primary school, community facilities and public open spaces.
- 6.3 Bromley-by-Bow is served by one Underground Station with services including the District and Hammersmith and City Line. It is designated as a Potential District Centre in the London Legacy Local Plan (2015) (**Policy 4.1** and **Allocation SA4.1**) and the Tower Hamlets Adopted Policies Map (2013). It is also classified in the draft London Plan (2017) as a Future District Centre.

Figure 6.1: London Legacy Local Plan Policies Map (2015)



Source: London Legacy Local Plan Policies Map (2015)

Figure 6.2: Tower Hamlets Adopted Policies Map (2013)



Source: Tower Hamlets Adopted Policies Map (2013)

6.4 As noted in the Tower Hamlets Retail Study (2016), Bromley by Bow at present does not have a functioning town centre due to the absence of a mix of town centre uses and the nature of its catchment. Instead, it is described as a 'collection of land uses'. These include: the Tesco superstore and the petrol filling station (the only retail provision in the centre), the Bromley by Bow underground station, a scaffolding company, a rent-a-car company and a large area of land including a derelict building. The underground station is located on the western side of the road, separated by the A12 which currently acts as a physical barrier to the centre.

Retail Composition and Diversity

6.5 **Table 6.1** below shows the composition and diversity of the town's retail and service outlets.

Table 6.1: Diversity of Uses – Bromley by Bow

Category	% of Total Outlets	UK Average 2016 %
Convenience	20.0%	8.7%
Comparison	0.0%	31.3%
Service	0.0%	47.5%
Vacant	20%	11.3%
Other Retail	60%	0.1%
TOTAL	100	100

Source: Tower Hamlets Retail Study (2016)

6.6 There are a total of 5 units within Bromley-by-Bow. The convenience provision is significantly above the national average as the centre only has one outlet namely, the Tesco superstore. Although there is no comparison retail outlets, the Tesco superstore does stock a range of comparison goods including clothing, electronics and some white goods. This store also has good convenience provision including a specialist fishmongers and butchers counter. It also has a pharmacy and click-and-collect service. A large car park serves the store and there is a nearby bus station. Other provision surrounding the main store include a Tesco petrol filling station, car rental service and scaffolding company. Bromley-by-Bow does not have any leisure uses.

6.7 It is noted that as part of the LLDC's aspirations for the centre the Tesco store will be redeveloped.

Vacancies

6.8 The vacancy rate of 20% is higher than the national average at 11.3%. There is only one vacant unit but when compared against the small number of units this registers a higher proportionate vacancy rate. This vacant unit is adjacent to the Tesco store and the A12. It has been vandalised with large amounts of graffiti and broken windows. This has an obvious negative perceptive impact on the centre.

Prime Zone A Rents

6.9 No information is available regarding prime zone A rents in Bromley-by-Bow.

The Environment and Accessibility

- 6.10 Bromley-by-Bow has a PTAL rating of 3⁴⁰ and is located in Zones 2/3. The A12 runs through the centre and provides direct links into Stratford and Canary Wharf. Vehicular access especially using buses and cars to the Tesco store is via the A12. The centre is also accessible via the Bromley-by-Bow underground station. There are also regular bus services to and from the Tesco store which stop immediately outside the store entrance. The bus services located at Bromley-by-Bow include the 323 (towards Canning Town / Mile End); 488 (Dalston Junction / Bromley-by-Bow Tesco); and the 108 (towards Lewisham / Stratford International). At the time of our site visit, the highest concentration of pedestrian activity was around the entrance to the Tesco store.
- 6.11 Pedestrian linkages at present are poor due to the busy A12 which can only be crossed via the subway which is uninviting particularly during night time. The town centre is also poorly linked to Bromley High Street (located outside of the LLDC's boundary) as access is via an underpass.
- 6.12 The Tesco superstore is considered to be the only aspect that is of a good environmental quality as it is well maintained, clean and tidy. The surrounding area consists of a large vacant derelict building which degrades the overall environmental quality of the centre as it has been vandalised and is in poor condition. This prominent building and the addition the noisy A12 decreases the overall environmental quality of the area. Furthermore, the subway link this does not create a safe and appealing environment for visitors. It should be noted that at present there are no residential, civic or community uses within Bromley-by-Bow.

New Investment and Development

- 6.13 Bromley-by-Bow is a centre focused for regeneration and is allocated as an Opportunity Area within the London Plan. The planning applications supporting the growth of both retail and leisure provisioning in the Bromley-by-Bow area are listed below:
- **17/003344/FUL** - Land at Imperial Street, Bromley by Bow, London, E3 3ED (Resolution to grant but pending final decision). Mixed-use scheme that includes 407 residential units; 339 sqm employment floorspace (Use Class B1); and 274 sqm flexible retail space. This site is located adjacent to the Tesco Superstore on Imperial Street.
 - **17/00364/FUL** - Land at Clockhouse and Access House, Imperial Street, Bromley-by-Bow, London, E3 3AE (Resolution to grant but pending final decision). Demolition of the existing buildings and the construction of a residential-led mixed use scheme comprising a series of buildings ranging from one to 27 storeys in height to provide 3,570 sqm of flexible community, commercial and retail floorspace (Use Classes A1, A2, A3, A4, B1 and/or D1) at ground and mezzanine floor level, 491 residential units (Use Class C3) on the upper floors, parking/refuse/servicing at basement and ground floor, energy centre, communal amenity areas, and all associated landscaped public open space. The LLDC has indicated a broad breakdown of the total 712 sqm of proposed potential 'A' type uses as follows: 178 sqm (A1); 178 sqm (A2), 178 sqm (A3) and 178 sqm (A4).

⁴⁰ WebCAT (tfl.gov.uk)

6.14 Both of the above schemes are residential led with an element of retail and leisure floorspace to support the emergence of the centre. In addition there is additional retail floorspace which is likely to come forward through some of the other remaining plots at Bromley-by-Bow but at this stage these have yet to secure any planning permission and thus cannot be quantified. According to the LLDC, development is also likely to result in the replacement of the current Tesco superstore with a potential smaller replacement supporting retail and community uses as set out in the broader Masterplan for the centre.

Summary

6.15 To promote a vital and viable District Centre will require a mix of complementary and integrated provision of uses at Bromley-by-Bow. It is noted that that the extant planning permissions include residential provision together with associated commercial and community floorspace. It is important that for a functioning centre there is an active retail area that provides for all the basic needs of its immediate residents, as well as other services, community facilities and is set within a high quality public realm.

6.16 The key strengths and weaknesses of the centre as it currently functions are as follows:

Strengths:

- The centre is located in an area with a focus on regeneration and proposed investment.
- The only anchor and attractor to the centre is the Tesco superstore with its broad provision of goods.
- Bromley-by-Bow is highly accessible with the proximity to the underground station and the A12.

Weaknesses:

- At present there is a high level of vacant and industrial units.
- It is presently poorly linked to the current residential areas along Bromley High Street and Stroudley Walk neighbourhood centre which are accessed via an underpass.
- Any delays in new development will impact the emerging centre coming forward.

7. HACKNEY WICK HEALTH CHECK

Context

- 7.1 Hackney Wick Centre falls largely within the London Borough of Hackney and part of (below the railway line) falls within the administrative boundary of the London Borough of Tower Hamlets.
- 7.2 It is located 3 km (2 miles) from Hackney Central, 2.5 km (1.5 miles) from Stratford and 8 km (5 miles) from Charing Cross. Hackney Wick is served by one train station (Hackney Wick) which provides London Overground services.
- 7.3 Hackney Wick is designated as a future Neighbourhood Centre (**Allocation SA1.1**). According to the London Plan, neighbourhood centres typically accommodate up to 10,000sqm of retail and leisure floorspace. During the adoption of the LLDC Local Plan (2014) it was estimated Hackney Wick contained approximately 3,500sqm of town centre uses and consists of a mix of small-scale retail, leisure and community uses as well as employment uses (including offices, workshops and industrial). The Hackney Wick Area Action Plan (HWAAP) (2012) (superseded by the LLDC Local Plan) stated that Hackney Wick is largely characterised by its industrial infrastructure, poor connectivity and a lack of cohesiveness.
- 7.4 By way of background, 'The Wick' became Hackney's industrial base in the 1800s due to its catchment and location to the water and transport corridors. Despite the decline in the area, Hackney Wick has benefited from the 2012 Olympic Games with the former Media Centre being converted to become a new hub for digital media, technological and creative industry hub also benefiting from its waterside location⁴¹.
- 7.5 Hackney Wick Centre is home to the arts community and has the opportunity regenerate the infrastructure and land remediated post-London Olympic and Paralympic Games. Hackney Wick is thus a focus for regeneration. The extent of the Hackney Wick Neighbourhood Centre boundary is illustrated in **Figure 7.1** below:

Figure 7.1: London Legacy Local Plan Policies Map (2015)



Source: London Legacy Local Plan Policies Map (2015)

⁴¹ Hackney Borough Council Local Plan: Core Strategy (adopted November 2010)

Here East

- 7.6 Here East is an important technology hub that is located outside the future Neighbourhood Centre. During the 2012 Games, Here East was a 24-hour media hub. Today, it aims to bring together business, technology, media and education. It is now home to businesses, artists and educators and is marketed as a 'campus' for people, culture and ideas to come together. It comprises some 111,483 sqm (1.2m sqft) of space and hosts a range of enterprises (e.g. BT Sport) and educational institutions (e.g. Loughborough University, London University College London) as well as the Plexal technological co-working space⁴².
- 7.7 Here East provides the critical local economic mass to enable the Hackney Wick to evolve and grow and attract successful Neighbourhood Centre uses. Together with the rest of Hackney Wick it provides space for creative and productive businesses.

Retail Composition and Diversity

- 7.8 **Table 7.1** below shows the composition and diversity of the centre's retail and service outlets. There are three comparison units and three A3/A4/A5 uses which typically consist of independently run 'hipster' cafés. These include: 'Grow' (a bar) and 'Number 90' (a bar and restaurant) located adjacent to the River Lee. There is no convenience goods provision at present.

Table 7.1: Diversity of Uses – Hackney Wick

Category	Number of Units	% of Total Outlets	UK Average 2016 %
A1 Convenience	0	0.0%	8.7%
A1 Comparison	3	15.0%	31.3%
A1 Service	0	0.0%	14.4%
A2 Financial & Professional	1	5.0%	10.4%
A3/A4/A5 Café / Drinking Establishments / Fast Food & Take Aways	3	15.0%	23.8%
Vacant	1	5.0%	11.3%
Other Retail	12	60.0%	0.1%
TOTAL	20	100.0%	100.0%

Source: Tower Hamlets Retail Study (2016) – Due to the internal split of warehouses it was not possible to ensure complete accuracy for the count and audit of the town centre uses. These figures may therefore not reflect a true representation of provision within Hackney Wick.

- 7.9 The Tower Hamlets Retail Study (2016) states that Hackney Wick is primarily an industrial area, with the main clusters of uses located near the station and 'Queen's Yard' courtyard. These units are occupied by creative industry uses such as art galleries and workspaces, as well as pop-up eateries and bars. Notwithstanding this, the area's offer has improved since then over time but with limited retail provision.
- 7.10 At present the centre operates as a night-time leisure destination due to the presence of 'hipster cafes' and workshops. For example, the Hub 67 is a community centre and provides a creative space for local residents

⁴² <https://hereeast.com/>

and young people. In the future Hackney Wick is likely to establish itself further as a specialist leisure and creative sector destination. This will contribute in providing the future Neighbourhood centre with an identity and critical mass of such provision.

Vacancies

7.11 **Table 7.2** below outlines the vacancy rate in Hackney Wick. The recent LLDC town centre audit found a total vacancy rate of 10.0% which shows a decline from 2015.

Table 7.2 Vacancy rate in Hackney Wick

Year	Vacancy Rate (%)	London Average (%)
2015	13.0%	4.3%
2017	10.0%	7.5%

Source: LLDC Survey Data (2017)

7.12 According to the LLDC, the Tower Hamlets Study focuses on the area south of the railway line. However, due to the nature of the centre, town centre uses are within former industrial buildings. It is therefore difficult to determine the correct vacancy rate within this location.

7.13 The progression with the Hackney Wick station development and associated plots for a new mixed use scheme, will precipitate the viability and development of the wider neighbourhood centre uses.

Prime Zone A Rents

7.14 No information is available regarding prime zone A rents in Hackney Wick.

The Environment and Accessibility

7.15 Hackney Wick has a PTAL rating of 3⁴³ and is located in Zone 2. As indicated previously, Hackney Wick is served by one train station. This provides London Overground services to Stratford, Richmond and Clapham Junction. Bus services also run throughout the centre including the 488 (towards Dalston Junction / Bromley-by-Bow Tesco); 276 (towards Stoke Newington / Newham Hospital); 30 (towards Hackney Wick / Marble Arch); and 339 (towards Leytonstone / Shadwell). Although there are pavements and zebra crossings provided for the pedestrian, these roads could be considered intimidating to the large presence of industrial uses. Furthermore, the busy A12 runs west of the centre and provides connections to Stratford and Bromley-by-Bow.

7.16 Throughout Hackney Wick, the presence of graffiti contributes to the overall character of the area as it is dominated by art industries. However, this simultaneously creates a negative perception in pockets of dereliction and thus perceived as a place which is run down and neglected. Additionally, due to the presence of industrial uses, the environmental quality is somewhat unwelcoming due to the lack of frontages. Furthermore, the busy A12 road negatively contributes to the overall feel of the centre.

⁴³ WebCAT (tfl.gov.uk)

New Investment and Development

7.17 The key schemes with planning permission within Hackney Wick include the following:

- **16/00166/OUT - Site known as 'Hackney Wick Central' (Resolution to grant but pending final decision).** Outline planning application for 28,281 sqm GIA of existing buildings on site and development of a phased comprehensive mixed use development of up to 119,242 sqm GIA. Residential (Use Class C3) of up to 78,931sqm to deliver approx. 874 units; Employment (B1a / B1c) of a minimum of 29,908 sqm; Retail (A1-A4) of up to 4,493 sqm; and Community Facilities (D1/D2) for a minimum of 381 sqm and up to 2,318 sqm; with up to 3,593 sqm of on plot undercroft or basement car parking, together with a minimum of 23,359 sqm public realm, playspace, open space and associated vehicle access. The LLDC has indicated that of the 13,940 sqm of A1 uses that 2,788 sqm each for the following uses: A1; A2; A3; A4 and A5. The decision of this application is still pending. Associated with the above are a range of other permissions that cover a number of the masterplan plots namely: applications namely: **15/00338/FUL**, **16/00003/FUL** and **14/00387/FUL** (detailed at **Appendix 4**).
- **13/00534/FUM and 13/00536/COU (linked applications) at Here East** - Site Comprising the International Broadcast Centre (IBC). Modification to the International Broadcast Centre to provide flexible B1, B8, education space D1, and flexible uses (B1/A1, A3, A4, A5). The LLDC has indicated the following quantum of potential proposed floorspace: 1,125 sqm (A1); 1,596 sqm (A3), 1,596 sqm (A4), 1,956 sqm (A5). At the time of writing this report it has been confirmed that the proposed floorspace has been delivered and largely occupied.
- **11/90621/OUTODA** - Legacy Communities scheme covering seven Planning Development Zones Development. Planning Development Zone (PDZ) 4 and 5 of the LCS scheme fall within the Hackney Wick Neighbourhood Centre boundary. The overall development comprises up to 641,817 sqm of residential (C3) uses, including up to 4,000 sqm of Sheltered Accommodation (C3); up to 14,500 sqm of hotel (C1) accommodation; up to 30,369 sqm (B1a) and up to 15,770 sqm (B1b/B1c) business and employment uses; up to 25,987 sqm (A1-A5) shopping, food and drink and financial and professional services; up to 3,606 sqm (D2) leisure space and up to 31,451sqm (D1) community, health, cultural, assembly and education facilities, including two primary schools and one secondary school; new streets and other means of access and circulation.

7.18 It is anticipated that the new commercial floorspace anticipated at Hackney Wick Centre will contribute to the establishment and viability of the critical mass of uses available within a neighbourhood centre.

Summary

7.19 In summary, Hackney Wick is an emerging neighbourhood centre with a strong night time economy and growing business profile. The key strengths and weaknesses of the centre include the following:

Strengths:

- The creative arts sector in Hackney Wick will generate potential for the centre to build upon its unique identity and role as a neighbourhood centre.

- Here East is a growing and innovative business catalyst and education hub outside the centre providing critical local economic mass for the future viability of a neighbourhood centre.
- Hackney Wick has a presence of independently run alternative cafés and restaurants. These contribute to the overall vibrancy of the area.
- The River Lee contributes to the public realm of the centre – in particular the bridge on White Post Lane provides views to the London Olympic Stadium and represents an area where leisure services can concentrate to build upon the night-time economy.
- The centre is well connected with TfL services including the London Overground and bus services.
- There is a significant amount of proposed development to establish a critical mass of provision.

Weaknesses:

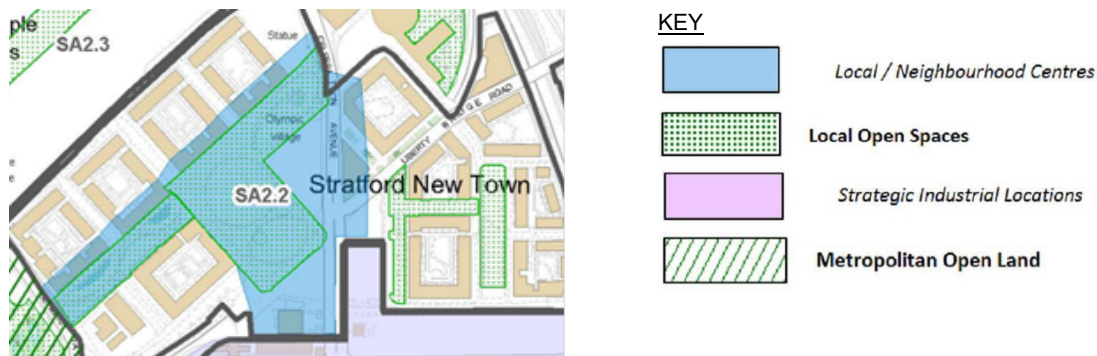
- Hackney Wick is in its infancy and an emerging with at present limited number of town centre uses.
- Graffiti and vandalism in pockets of the centre.
- Perception of safety especially during night time.
- Any delays in new development will impact the emerging centre coming forward.

8. EAST VILLAGE HEALTH CHECK

Context

- 8.1 East Village was formerly the athlete's accommodation during the 2012 Olympic Games. It is a designated new Local Centre with shops, bars and restaurants and a new residential neighbourhood. It is served by the nearby Stratford International station and is located north of the QEOP.
- 8.2 The extent of the local centre (**Allocation SA2.2**) is illustrated in **Figure 8.1** below.

Figure 8.1: London Legacy Local Plan Policies Map (2015)



Source: London Legacy Local Plan Policies Map (2015)

Retail Composition and Diversity

- 8.3 For convenience goods, a Sainsbury's Local is located on Celebration Avenue⁴⁴. There is also an East Village Market which hosts food, drink and crafts, as well as artisan bakers, cheese makers, and fresh bean baristas. This operates every Sunday, 11am to 4pm. In addition there is a family-owned green grocer and farm shop (Ted's Veg) and a charcuterie and cheese shop (Appetite London). For comparison goods, there is a bicycle shop (Pave Velo), a wine shop (Bottle Apostle), a pharmacy (Salus Pharmacy).
- 8.4 For retail services, there is a beauty salon (Regency Beauty); a postal service (Mail Boxes etc); and a family owned dry cleaners (Starshine Dry Cleaners). For leisure services there is a bakery and coffee shop (Signorelli); a sports injury clinic, yoga and pilates (Fix); a dentist (East Village Dental); and a fitness gym (Better Gym East), as well as a range of restaurants selling a cuisines including: European; Greek; Italian; as well as fish; burgers; gelato; and a juice bar.

⁴⁴ The LLDC has confirmed that this is a temporary use on a development plot (N16).

Figure 8.2: East Village Map



Source: East Village London⁴⁵

Vacancies

8.5 The vacancy rate according the LLDC survey in 2017 stood at 18.8% which is higher than in 2016 of 15.8% and the London average of 7.5%. The 2017 rate is lower than in 2015 when it stood at 52.0%. The high vacancy rate in 2015 (52.0%) is attributed to the fact that East Village only became occupied in 2014. The rising vacancy rate reported at 2017 needs to be monitored proactively.

Table 8.1: Vacancies in East Village from 2015 – 2016

Year	Vacancy Rate (%)	London Average (%)
2015	52.0%	4.3%
2016	15.8%	8.4%
2017	18.8%	7.5%

Source: LLDC Survey Data (2018)

Prime Zone A Rents

8.6 No information is available regarding prime zone A rents at East Village / Here East.

⁴⁵ <http://www.eastvillagelondon.co.uk/>

The Environment and Accessibility

- 8.7 East Village has a PTAL rating of 6b and is located in Zone 2. Due to its close proximity to Stratford International Station, East Village has numerous connections including National Rail; London Overground; Tube; DLR; Tram and Buses. East Village has 6 bus services including: the 97 (towards Chingford / Stratford City Bus Station); 339 (towards Leytonstone / Shadwell); 58 (towards Walthamstow / East Ham); 158 (towards Stratford / Chingford Mount); 69 (towards Walthamstow Central / Canning Town); and 308 (towards Wanstead / Clapton Road).

New Investment and Development

- 8.8 The key schemes emerging within East Village include **10/90641/EXTODA** – Stratford City Site detailed previously that also covers development at East Village and covers a number of plots, some under construction, some with permission and others pending reserved matters approval. Zone 3, 4 & 5 cover East Village Local Centre and the remaining retail floorspace proposed is some 6,280 sqm floorspace (split equally in to A1/A2/A3/A4 uses - see **Appendix 4**).

Summary

- 8.9 In summary, the health check assessment shows that East Village is a growing local centre. Its key strengths and weaknesses are:

Strengths:

- East Village is an evolving local centre with a developing mix of diverse commercial and leisure provision.
- The modern look of the area and good public realm are positive attributes for the centre.
- The residential development at East Village creates with ground floor frontages provides a community feel and creates viability in the area.
- The East Village Market contributes to the vibrancy of the area.

Weaknesses:

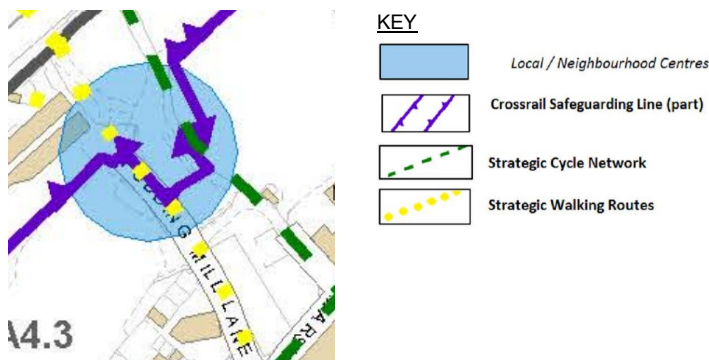
- Competition posed by the proximity to the critical mass of offer within the Metropolitan Centre.

9. PUDDING MILL HEALTH CHECK

Context

- 9.1 Pudding Mill is an island site located south of the QEOP. It was partially cleared for the 2012 Olympic Games and is allocated for residential and business floorspace, a local centre, open space and infrastructure. It currently consists of small scale retail and office workshop uses and residential development. The Pudding Mill SPD (2017) states that the redevelopment of Pudding Mill will provide links into QEOP, Stratford High Street and Bromley-by-Bow. It is currently served by one train station (Pudding Mill Station).
- 9.2 Pudding Mill is designated as a future Local Centre in the London Legacy Local Plan (2015) (**Allocation SA4.3**) as shown below.

Figure 9.1: London Legacy Local Plan Policies Map (2015)



Source: London Legacy Local Plan Policies Map (2015)

Composition

- 9.3 As the centre is evolving as part of a process of development, there is limited provision of town centre uses. The provision currently consists of: the Three Mills Café (located on the High Street); Charles Wilson Engineers (accessed via Sugar House Lane); and a McDonald's (located on the corner of the High Street and the A12).
- 9.4 Within the Pudding Mill SPD (March 2017) there are aspirations for the local centre for both Pudding Mill Lane and Marshgate Lane to host active ground floor town centre uses, with residential and other town centre uses above.

The Environment and Accessibility

- 9.5 Pudding Mill has a PTAL rating of 2 and is located in Zone 2/3. It has DLR services providing connections to Stratford and Canary Wharf.
- 9.6 There are regular bus services that run along Stratford High Street including: the D8 (towards Crossharbour and Stratford); 25 (towards Ilford / Oxford Circus); 108 (towards Stratford / Lewisham); 276 (towards Newington / Newham Hospital); and 425 (towards Clapton / Stratford).
- 9.7 Pudding Mill Station is accessed via the A12. This is a busy road that generates a large amount of noise pollution.

9.8 In terms of constraints, Pudding Mill is bounded on three sides by the waterways and the railway line. This encloses the centre and limits the access into the site and its relationship with the wider area. An enhancement of Barbers Road will improve the overall connectivity to Pudding Mill Lane and across the centre.

New Investment and Development

9.9 The key schemes emerging within Pudding Mill are listed below:

- **11/90621/OUTODA** - Legacy Communities scheme covering seven Planning Development Zones Development detailed previously. Zone 8 (PDZ8) is the plot relating to Pudding Mill with proposed uses in the order of : 1,200 sqm gross (A1-A2 uses i.e. 600 sqm gross each) and 1,500 sqm gross (A3/A4/A5 uses – i.e. 500 sqm gross each)
- **15/00392/FUL** - Development at Cook's Road for a mixed use redevelopment comprising the erection of two buildings comprising: 194 residential units including affordable housing, 2,136 sqm of commercial floorspace (A1-A3 / B1 / D1 / D2), together with car parking and landscaping. This is another residential led scheme with a commercial element.

9.10 The above illustrates development of the residential element supported by commercial retail and leisure provision will inevitably promulgate the growth of the emerging local centre and associated town centre uses.

Summary

9.11 The key strengths and weaknesses of the emerging centre in its current context are:

Strengths:

- There are firm aspirations for the local centre and development opportunities to build upon the function of a local centre.
- Good accessibility with DLR links and connections onto the A12.

Weaknesses:

- Any delays in new development will impact the emerging centre coming forward.

10. QUANTITATIVE RETAIL NEEDS ASSESSMENT

10.1 This section sets out the results of the quantitative retail need ('capacity') assessment for new retail (comparison and convenience goods) floorspace in the LLDC area incorporating the Stratford Metropolitan Centre and covering the period from 2018 to 2036 (further broken down into forecasts at 2021, 2026, 2031 and 2036). This assessment updates and supersedes the findings of the LLDC's previous evidence-based studies and specifically Retail & Leisure Requirements Review 2014 (RLRR 2014).

The CREAT^e Model: Key Baseline Assumptions & Forecasts

10.2 The CREAT^e economic model has been specifically designed and developed by Carter Jonas over a number of years to assess the capacity for and impact of new retail (convenience and comparison goods) development and investment.

10.3 The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice guidance. The model is underpinned by survey-derived market share analysis, which helps to inform the assessment of the current (convenience and comparison goods) turnovers and trading performance of existing centres, shops and stores at the base year.

10.4 It has been assumed for the purpose of the capacity assessment that the local retail markets in the LLDC area is in '*equilibrium*' at the base year (2018). In other words all existing centres and stores are broadly assumed to be trading in line with their expected ('benchmark') turnover levels at the base year. This approach is reasonable, robust and realistic in this case as it reflects the impact of the economic downturn and the significant growth in internet sales on the trading levels and performance of retailers and stores across the UK. It also reflects the potential impact of Brexit on the economy and retail sector going forward.

10.5 On this basis any residual expenditure available to support new retail floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels (based on population and expenditure growth), and the constrained growth in 'benchmark' turnovers⁴⁶ based on applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace⁴⁷.

10.6 It is important to restate that long-term forecasts should be treated with caution, as they will be influenced by changes in economic, demographic and market trends. As a result we advise that greater weight should be placed on the short term forecasts carried out over a five year period (see PPG, para 003). Notwithstanding this, the LLDC will need to take account of the forecast capacity for new retail floorspace over the plan period to inform its policy making and site allocations, as the NPPF (paragraph 23) states that local planning authorities should meet the need for retail and town centre uses 'in full' (see **Section 2** of this study).

⁴⁶ In this case, under the 'equilibrium' approach, the 'benchmark' turnovers at the base year (2018) are assumed to be the 'current' turnovers derived from the market share analysis.

⁴⁷ The 'efficiency' growth rates are informed Experian's latest *Retail Planner Briefing Note 15* (Figures 4a and 4b). These year-on-year turnover growth rates help to maintain the viability and vitality of existing centres and stores over time, particularly against the backdrop of increasing occupancy costs (e.g. rents, business rates, service charges, etc.) and labour costs. It should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'efficiency' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

- 10.7 The updated capacity forecasts set out in this section are intended as a broad guide to enable the LLDC to assess the broad strategic options for the spatial distribution of new retail-led floorspace and development over the plan period, and to make informed policy choices about where any forecast need should be met, in accordance with the advice set out in the NPPF (paragraph 24). It follows that the allocation of sites to meet any identified need over the next five years, and over the lifetime of the development plan, will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.
- 10.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT[®] Model are described in more detail below.

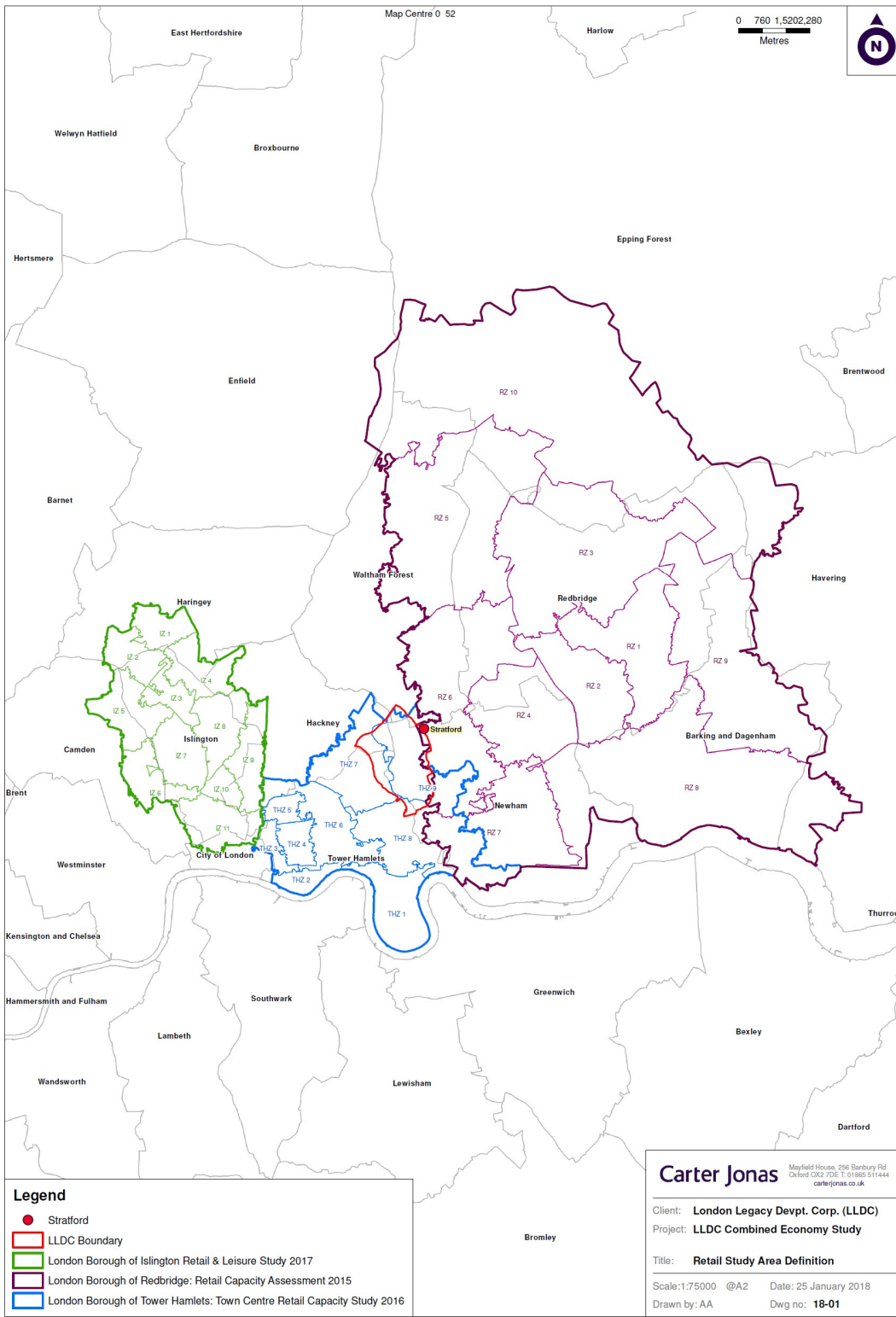
Study Area and Zones

- 10.9 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case, the remit of the study brief did not specify nor budget for a bespoke survey but a review of existing evidence based studies. In this way the following recent evidence based studies were reviewed due to their relatively recent assessment of shopping patterns and the results of the contributing household telephone interview surveys utilised as part of this assessment:
- London Borough of Redbridge: Retail Capacity Assessment 2015: Survey data - October 2015
 - London Borough of Tower Hamlets: Town Centre Retail Capacity Study 2016: Survey data – May / June 2016
 - London Borough of Islington Retail & Leisure Study 2017: Survey data – January 2017
- 10.10 To note that the RRLR 2014 used the outputs of the London Borough of Newham Retail Study 2013 (undertaken by Roger Tym & Partners). This study was updated by Bilfinger GVA in 2016. However, the household survey contributing to this updated study was found to be dated ⁴⁸ and therefore not used. The 2017 London Borough of Hackney Town Centre & Retail Study was also reviewed and discounted. This is because its survey area did not extend nor cover the Stratford area and therefore was not included in the analysis.
- 10.11 The study area for the current assessment therefore covers a wider geography than assessed before as it is an amalgamation of three different study areas, representing three different household surveys with a combined total of 3,002 interviews⁴⁹. The survey results help to identify broad patterns and preferences for different types of retail (convenience and comparison goods) shopping purchases and online shopping across the study area. The extent of this is shown in **Figure 10.1** (and at **Appendix 2**).

⁴⁸ The household survey contributing to the 2016 Newham Study was dated February 2013 / December 2014. It was determined that the February 2013 date referred to a survey carried out for the Woodwharf / Surrey Quays area (1,000 interviews) and this was supplemented by some 400 interviews in December 2014 to cover the Cannington town area. The aim of this additional survey was to cover the same study area as the 2007 Canning Town Study. In short, the bulk of the survey data would have been dated and therefore discounted for use in this assessment.

⁴⁹ This comprises 1,000 interviews in the London Borough of Redbridge Household Survey (2015); 899 Interviews in the London Borough of Tower Hamlets: Town Centre Retail Capacity Study (2016) and 1,103 London Borough of Islington Retail & Leisure Study (2017).

Figure 10.1: Representation of Study Areas from Extant Studies



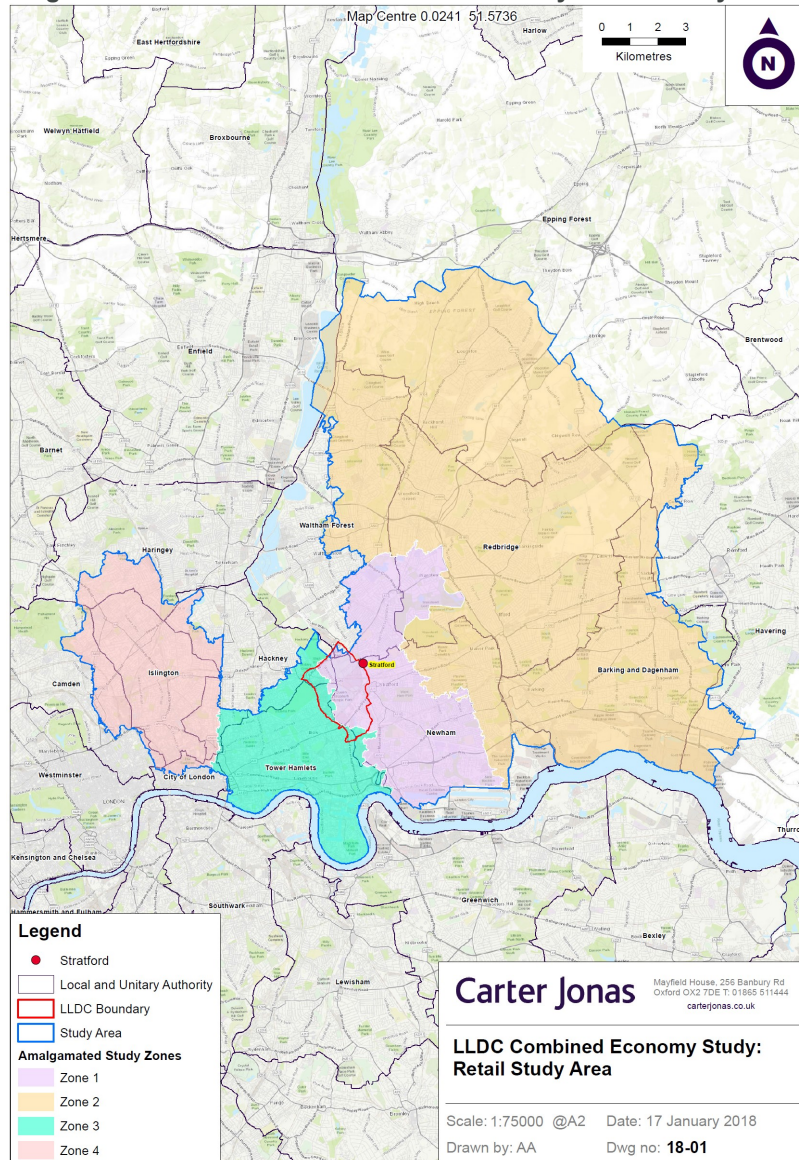
Reproduced from the Ordnance Survey Map with permission of the Controller of Her Majesty's Stationery Office. © Crown Copyright 2018. Carter Jonas LLP ES100021719

10.12 To define the study area for the current assessment, the study areas from the extant studies have been redefined into four zones as follows:

- **ZONE 1:** Comprises of the amalgamation of Zone(s) 6 & 7 of the Redbridge study and Zone 9 of the Tower Hamlets Study
- **ZONE 2:** This comprises of all the remainder of the Redbridge study area zones i.e. Zone(s) 1, 2, 3, 4, 5, 8 and 9.
- **ZONE 3:** This comprises of all the remainder of the Tower Hamlets study area zones i.e. Zone(s) 1, 2, 3, 4, 5, 6, 7 and 8.
- **ZONE 4:** This comprises all the zones for the Islington study.

10.13 The resulting study area as shown in **Figure 10.2** (and at **Appendix 1**) provides a more robust geography and better understanding of shopping patterns.

Figure 10.2: LLDC Combined Economic Study: Retail Study Area



10.14 Carter Jonas has amalgamated and harmonised the responses from the three surveys to inform the baseline market share analysis and the centre/store turnover estimates that underpin the quantitative assessment.

Convenience Goods – Market Share Analysis

- 10.15 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). The survey-derived market share (%) analysis for all convenience goods shopping is set out in Table 1 (**Appendix 7**). It should be noted that for this stage of the analysis the market shares for both convenience and comparison goods retailing include expenditure on 'Special Forms of Trading' (SFT - including internet sales), but exclude 'null' responses in accordance with good practice.
- 10.16 The overall market shares in Table 1 have been derived from the analysis of the responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. In order to avoid the market share analysis of food shopping patterns being 'skewed' by larger superstores and food stores in the study area, the analysis of the constituent surveys also analysed responses to where else they normally shop for 'top up' purchases. The market shares for these different types of food shopping are set out in detail in Tables 2-3 (**Appendix 7**).
- 10.17 The responses for 'main food' and 'top-up' food shopping purchase have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have applied a reasonable and robust weighting of 65% for main 'bulk' shopping and 35% for primary 'top-up' shopping.
- 10.18 The key findings of the market share analysis are briefly described below:
- 10.19 In terms of the market share of special forms of trading (SFT), and principally internet shopping, Table 1 (**Appendix 7**) shows that the share of all food shopping across the study area (i.e. zones 1-4) is 4.6%
- 10.20 To place the derived SFT market shares in context, Experian's latest Retail Planning Briefing Note 15 (RPBN 15, December 2017) indicates that the national average for non-store (SFT) convenience goods retail sales is 10.8% in 2017 (see **Section 3**). This is significantly higher than the market shares identified for the study area zones. A number of factors may influence this lower than average market share at the local level; such as, for example, good provision and convenient access to (physical) food stores, compared with access to internet shopping/deliveries, and the range/quality of the internet infrastructure. This would seem to suggest that there is potential for SFT market penetration to increase in the future as online grocery shopping becomes more popular, accessible and convenient. If this was to occur, then it would reduce the residual expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period.
- 10.21 The LLDC recently commissioned a survey from Opinion Research Services (ORS Survey)⁵⁰ on the usage of local facilities to understand preferences within the LLDC area only. This shows that locally the market share for internet shopping for main food shopping was stated at 6% and 1% for top-up shopping. The resulting broad average of 3.5% is lower than the 4.6% derived from the survey area analysis detailed above. This notwithstanding, the 6% market share for main food shopping is higher than the derived 4.6% from the survey

⁵⁰ Opinion Research Services: Local Plan Population Forecast Model Review 2017 – Residents Data (November 2017). To note that the ORS Survey covers the geographic area of the LLDC area only and this way the responses are from the local residents only. Additionally the survey covers only a few elements relating to convenience and comparison goods provision and the responses are referenced where relevant in the remainder of this section.

area but lower than the Experian average of 10.8% suggesting that there is potential for SFT market penetration to increase in the future.

10.22 Turning to the market share analysis for the main centres and stores in the LLDC area the analysis shows that stores are achieving an overall convenience goods market share ('retention level') of 10.1% from within the wide study area Table 1 (**Appendix 7**). Whilst seemingly this may indicate a low level of retention, it has to be qualified by the fact that the study area is extensive with significant convenience provision coupled by the fact that convenience shopping is not a destination but local based activity. On this basis it is a realistic level of retention. **Table 10.1** below summarises the market shares for stores in the LLDC area for all convenience goods from across the study area.

Table 10.1: Study Area: Convenience Goods Market Shares

Location / Store	ZONE 1	ZONE 2	ZONE 3	ZONE 4	Total Study Area
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	0.7%	0.0%	0.7%	0.0%	0.4%
Marks & Spencer, Westfield, Stratford City	0.7%	0.0%	0.2%	0.0%	0.2%
Waitrose, Westfield Stratford City	0.3%	0.1%	0.0%	0.0%	0.1%
Sainsbury's Superstore, The Mall, Stratford	3.4%	0.1%	10.6%	0.0%	4.9%
Tesco Express, High Street, Stratford	0.7%	0.0%	0.3%	0.0%	0.2%
All Other Stratford Town Centre	1.4%	0.1%	0.1%	0.0%	0.2%
Subtotal	7.2%	0.3%	11.8%	0.0%	6.0%
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	0.5%	0.5%	0.0%	0.0%	0.3%
Tesco Superstore, Hancock Road, Bromley-by-Bow	1.1%	0.0%	4.3%	0.0%	2.0%
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	0.0%	0.0%	0.3%	0.0%	0.1%
Other Bromley-by-Bow	0.2%	0.0%	0.4%	0.0%	0.2%
Subtotal	1.8%	0.5%	5.1%	0.0%	2.6%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	8.7%	0.3%	0.4%	0.0%	1.4%
Tesco Express, Romford Road, Stratford	0.0%	0.1%	0.3%	0.0%	0.1%
Subtotal	8.7%	0.4%	0.7%	0.0%	1.5%
LLDC Area	17.7%	1.2%	17.7%	0.0%	10.1%
Other Centres / Stores	79.9%	94.5%	77.3%	92.9%	85.3%
SFT	2.4%	4.4%	5.0%	7.1%	4.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

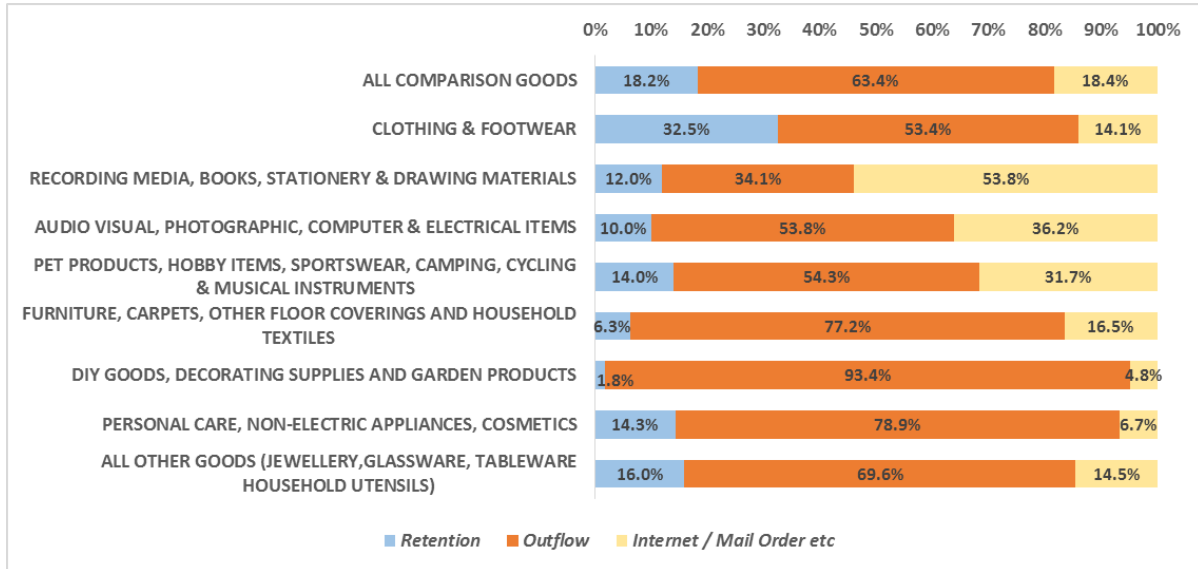
10.23 **Table 10.1** shows that the stores in the LLDC / Stratford area with a dominant market share are Sainsbury's, The Mall (4.9%), Tesco Superstore, Bromley-by-Bow (2%) and Morrisons, the Grove (1.4%). Sainsbury's, The Mall has a high market share in Zone 3 (10.3%) and Zone 1 (3.4%). Tesco, Bromley-by-Bow draws its highest market share from Zone 3 (4.3%). Morrison's The Grove draws its highest market share from Zone 1 (8.7%).

Comparison Goods – Market Share Analysis

- 10.24 Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods (see Glossary – **Appendix 8**). The household survey accompanying each of the extant studies comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest Retail Planner Briefing Note, including: clothing and footwear, recording media, electrical goods, books, furniture and carpets, DIY and garden products, medical goods and other non-food goods.
- 10.25 Table 1 (**Appendix 8**) shows the market shares (%) for all comparison goods shopping purchases made both within and outside the study area. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-9 (**Appendix 8**). As part of the analysis in combining survey responses from three extant studies, the market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments. As for the analysis of convenience goods, the market shares include expenditure on special forms of trading (SFT) but exclude all 'null' responses.
- 10.26 Table 1 (**Appendix 8**) shows that SFT's market share of all non-food shopping across the total study area is 18.4%. In comparison, Experian's latest RPBN15 shows that the national average market share for non-store (SFT) comparison goods retail sales is 19.7% in 2017 (see **Section 3**). While SFT market shares for the study area are marginally below the national average, there is potential for SFT to increase its market share penetration in the future; for example, Experian forecast average SFT non-food market shares will increase to 22.5% by 2021 and 24% by 2036. If the SFT market share for the study area was to increase by the same rate (proportionally) as forecast by Experian, then it will reduce the residual expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2036.
- 10.27 The LLDC'S ORS Survey for selected categories of comparison goods shows the following SFT market shares:
- Clothing (7.5%) & Footwear (7.5%)
 - Electricals (20.1%)
 - Luxury Items (10.1%)
- 10.28 The above indicates a range of between 7.5% and 20.1% and an average of 11.3%. In broad terms the upper range for electrical items at 20.1% is marginally above the Experian average for comparison goods of 19.7% but for the other categories the market share is lower. This again suggests that there is potential for SFT market penetration to increase in the future more locally.
- 10.29 Turning to the market shares for the main centres and out-of-centre stores and shopping facilities in the study area, Table 1 (**Appendix 8**) shows that they are achieving an overall 'retention level' of 18.3% across the whole study area. As with convenience goods, whilst on the face of it this may indicate a low level of retention, it has to be qualified by the fact that the study area is extensive and in broad terms this is a good level of retention. It is also representative of the critical mass and pull effect of Westfield Stratford City.

10.30 **Figure 10.3** below shows the 'retention' of comparison goods expenditure in the study area, the market share of SFT and the 'leakage' ('outflow') of expenditure to competing centres, stores and shopping facilities located outside the LLDC area.

Figure 10.3: Comparison Goods Market Shares for the Study Area



10.31 The figure shows that the highest proportion of expenditure 'outflow' is in the categories of 'DIY goods, decorating supplies and garden products' (93.4%) and 'personal care, non-electric appliances, cosmetics' (78.9%) and 'furniture, carpets & flooring' (77.2%). In contrast 'clothing and footwear' (32.5%) and 'other goods (jewellery, glassware, tableware, utensils etc)' (16.0%) have the highest expenditure retention rates. Online shopping mainly dominates the 'recording media, books stationery' (53.8%) and 'audio visual, photographic and electrical items' (36.2%) category.

10.32 **Table 10.2** below summarises the market shares for centres in the LLDC area for all comparison goods from across the study area. This shows that Stratford has a particularly strong level of retention in its core Zone 1 of 33.4% and adjacent Zone 3 at 22.4%. Central London is also a key competitor especially in Zones 3 (13.3%) and Zone 4 (21.7%). Canary Wharf also shows some prominence in Zone 3 (4.8%).

Table 10.2: Study Area: Comparison Goods Market Shares

ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	33.4%	11.1%	22.4%	1.7%	18.0%
Local Centres					
Bromley-by-Bow	0.1%	0.0%	0.6%	0.0%	0.3%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.1%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	2.6%	10.6%	0.4%	0.0%	4.6%
Romford Town Centre	0.6%	8.6%	0.2%	0.0%	3.5%
Central London	2.8%	2.5%	13.3%	21.7%	8.4%
Canary Wharf	0.2%	0.0%	4.8%	1.0%	2.2%
Beckton: Triangle Retail Park	1.2%	0.0%	1.9%	0.0%	1.0%
Beckton: Gallions Reach Shopping Park	1.5%	0.0%	2.8%	0.0%	1.4%
Beckton: Other	2.8%	0.0%	2.0%	0.0%	1.2%
All Other Centres / Stores	41.3%	51.6%	31.2%	45.3%	41.2%
Subtotal	53.1%	73.3%	56.6%	68.1%	63.4%
Special Forms of Trading / Internet Shopping					
	13.4%	15.7%	20.4%	30.2%	18.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

Base Year Population and Projections

10.33 The 2018 ('base year') population estimates and projected population figures sourced directly from the Retail Planner Reports ('RPR') using CJ's in-house Experian MMG3 Geographic Information System (MMG3 GIS). This details the population projections over the period to 2036 based on Experian's 'demographic component model', which takes into account age, gender, birth rates, ageing, net migration and death rates.

10.34 The Experian projections show a +22.3% growth for the study area as a whole between 2018 and 2036; from 1,848,945 to 2,260,366 (+411,421) as shown below:

Table 10.3: Population Forecasts: Experian Projections

ZONE:	2018	2021	2026	2031	2036	%	2018-36
Zone 1	306,056	318,425	336,102	351,699	366,103	19.6%	60,047
Zone 2	754,654	787,833	838,137	883,285	925,544	22.6%	170,890
Zone 3	361,685	382,764	411,669	437,171	460,731	27.4%	99,046
Zone 4	426,550	443,672	466,821	487,822	507,988	19.1%	81,438
Study Area	1,848,945	1,932,694	2,052,729	2,159,977	2,260,366	22.3%	411,421

10.35 By way of background information, we have also tested the Experian derived demographic data against the growth rate derived from the Greater London Authority's 2016 Interim Housing Led population projections

(published in July 2017)⁵¹. This showed a lower +16.1% growth for the study area as a whole between 2018 and 2036; from 1,848,945 to 2,145,893 (+296,948) as shown below:

Table 10.4: Population Forecasts: GLA Projections

ZONE:	2018	2021	2026	2031	2036	%	2018-36
Zone 1	306,056	315,453	331,761	348,912	366,950	19.9%	60,894
Zone 2	754,654	777,482	817,074	858,682	902,408	19.6%	147,754
Zone 3	361,685	368,804	380,981	393,561	406,556	12.4%	44,871
Zone 4	426,550	433,499	445,333	457,490	469,979	10.2%	43,429
Study Area	1,848,945	1,895,238	1,975,149	2,058,645	2,145,893	16.1%	296,948

The difference in the annualised growth rate by zone and study area is shown in **Table 10.5**.

Table 10.5. Comparison Experian v/s GLA Population Forecasts

Annualised Growth Rate (2018 - 2036) (% per annum)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	Total Study Area
Experian Projections	1.00%	1.14%	1.35%	0.98%	1.12%
Greater London Authority Projections	1.01%	1.00%	0.65%	0.54%	0.83%
Difference	-0.01%	0.14%	0.70%	0.44%	0.29%

10.36 For the purposes of this study the higher level population forecasts as derived from Experian have been used. These have been further adjusted upwards in Zone 1 to reflect the population projections for the LLDC area. The resulting projections are used in this assessment. Table 1, **Appendix 5** (convenience goods) and Table 1, **Appendix 6** (comparison goods) sets out the base year (2018) population and associated projections. This show a +26.2% growth for the study area as a whole between 2018 and 2036; from 1,851,173 to 2,336,849 (+485,552) as shown below:

Table 10.6: Population Forecasts: Adjusted Experian Projections To Account for LLDC Projections

ZONE:	2018	2021	2026	2031	2036	%	2018-36
Zone 1	308,284	336,392	381,572	416,952	442,586	43.6%	134,302
Zone 2	754,654	787,833	838,137	883,285	925,544	22.6%	170,890
Zone 3	361,685	382,764	411,669	437,171	460,731	27.4%	99,046
Zone 4	426,550	443,672	466,821	487,822	507,988	19.1%	81,438
Study Area	1,851,173	1,950,661	2,098,199	2,225,230	2,336,849	26.2%	485,676

Base Year Expenditure per Capita & Forecasts

10.37 The revised per capita expenditure and growth forecasts for each study zone are set out in **Appendix 5** for convenience and **Appendix 6** for comparison goods. The base year average expenditure figures have been derived from our in-house Experian MMG3 GIS based on 2016 prices.

⁵¹ In undertaking this testing exercise and where a study zone covered a number of local authority areas we applied an annual average population growth rate based on the combined population for the composing authorities. In terms of the LPAs that covered the study area, this included Barking & Dagenham, Camden, City of London, Hackney, Haringey, Havering, Islington, Newham, Redbridge, Tower Hamlets & Waltham Forest. Additionally, as Zone 2 extended northwards to Epping Forest District Council, the annualised population growth rate over the period (2018-2036) was also taken in to account in this testing exercise.

10.38 In identifying average expenditure levels, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. The most appropriate allowance for SFT has been informed by the combined results of the extant studies previously mentioned. The survey-derived market share analysis (Table 1, **Appendix 8**) shows that some 18.4% of all comparison goods expenditure in the study area was accounted for by internet and non-store sales (including mail order purchases). For convenience goods SFT accounted for 4.6% of total available expenditure in the study area (Table 1, **Appendix 7**).

10.39 The survey-derived shares have been adjusted downwards to reflect the fact that a proportion of online food and non-food sales are sourced from traditional stores rather than from dedicated ('dotcom') warehouses. This is in compliance with the advice set out in Experian's latest RPBN. The adjusted SFT market share for comparison goods is 14.3% in 2018, which is marginally below the Experian 2018 national average figure of 15.4%. In contrast the locally adjusted SFT market share for convenience goods of 1.5% is below the 2018 national average of 3.4%.

10.40 Clearly if future growth in SFT (online shopping) is higher in the study area than the national projections, then this would effectively reduce the total available expenditure to support existing and new floorspace over the forecast period.

Total Available Expenditure

10.41 Table(s) 2 and 3 forecast the growth in total available convenience goods (**Appendix 5**) and comparison goods (**Appendix 6**) retail expenditure respectively across the study area and zones between 2018 and 2036 (excluding SFT).

10.42 The tables shows that total convenience goods expenditure is forecast to increase by +26.3% (+874.3m) for the study area as a whole; from £3,326.5m in 2018 to £4,200.8m m by 2036. Total comparison goods expenditure growth is forecast to be significantly higher, +112.2% (+£5,212.7m); from £4,644.1m to £9,856.8m.

10.43 The growth in comparison goods expenditure significantly outstrips convenience goods spend over the study period. This effectively means that there should be greater capacity potential for new comparison goods floorspace than for convenience goods retailing; although this will be dependent on the level of retail commitments in the pipeline and the forecast growth in the 'productivity' levels of existing floorspace and stores.

Market Share Analysis (excluding SFT)

10.44 The earlier market share analysis described the headline results of the survey-derived (%) market share analysis, including SFT. For the purpose of the retail capacity assessment, and in line with accepted approaches, the market share analysis has been adjusted for both convenience goods (Table 1, **Appendix 9**) and comparison goods (Table 1, **Appendix 10**) to exclude SFT.

10.45 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the study area and zones to the identified centres, stores and floorspace based on the survey-derived market shares. This helps to establish the current 'baseline' (2018) trading performance for

the main centres and stores across based on expenditure drawn from the study area only. It should be noted that no allowance is made at this stage for any potential 'inflow' (trade draw) of expenditure to centres and stores from outside the defined study area.

10.46 For both convenience goods (**Appendix 9**) and comparison goods (**Appendix 10**) the 'baseline' turnovers are projected forward to 2021 (Table 3), 2026 (Table 4), 2031 (Table 5) and 2036 (Table 6) assuming no changes in market shares. This 'constant market share approach' is standard practice for retail capacity and impact assessments. However, the LLDC will be aware that it is a highly theoretical approach as it does not, for example, take account of the potential impact that new retail investment and development (both within and outside the local area) can have on existing shopping patterns, market shares and turnovers over time.

'Inflow' (Trade Draw) from outside Study Area

10.47 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores in the LLDC area (including the whole of the Metropolitan Centre boundary) we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined study area. The 'inflow' assumptions take account of:

- the scale, offer and location of all existing centres and stores in the study area;
- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the study area; and
- the likely retail expenditure derived from people who live outside the study area (including tourists, visitors and commuters) in the study area's main centres and stores.

10.48 We have also taken account of previous studies and retail assessments to help inform our judgements.

10.49 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing within Stratford will draw a proportion of shoppers and trade from outside the defined study area especially considering the critical mass and type of retail offer at Westfield Stratford City.

10.50 On the other hand the local centres will generally draw the majority of their shoppers and trade from within their more localised catchments, with limited or no 'inflow' from outside the study area.

10.51 The 'inflow' of convenience goods expenditure to the main centres and stores from outside the wider study area will also be more limited than for comparison goods, as households generally carry out their main food shop at their more local and convenient stores, and do not generally travel longer distances for food purchases.

Total Turnover of Centres and Stores

10.52 The assessment of the total turnover of all centres and stores is based on the expenditure allocated to these centres/stores according to their survey-derived market shares at 2018, and our judgements as to the total "inflow" of trade to these centres/stores from outside the defined study area. The detailed (convenience and comparison) goods turnovers are appended to this report as follows: **Appendix 9** sets out the revised turnover

estimates for convenience across the main centres with estimates for comparison goods turnover presented in **Appendix 10**.

Retail Floorspace Commitments/Allocations

10.53 The next stage in the retail capacity assessment takes into account the retail floorspace and predicted turnovers of all the major food and non-food commitments and others that have a resolution to be granted planning permission (subject to say s.106 agreement signoffs) in the LLDC area at the time of preparing this study. Based on information provided by the LLDC the major planned/committed retail schemes are detailed below.

Stratford City Permission

- **10/90641/EXTODA – Stratford City Site** - This is the overarching planning permission that pertains to the Stratford City Site that consist of five zones. The permission comprises the comprehensive mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link. To note that this permission also covers development in the East Village and Cherry Park area(s) of the site (as detailed at **Appendix 4** for reference). There is a specific permission for Cherry Park (15/00358/OUT) which has been assessed separately below and which represents Zone 1 of the permission). For the purposes of this assessment, the future anticipated retail floorspace provided by the LLDC is as follows:

Under Stratford Metropolitan Centre

- **Zone 1: 15/00358/OUT - Stratford City Site - Cherry Park, Stratford City, E20 1EJ.** (Resolution to grant but pending final decision). Residential floorspace (up to 105,000 sqm GEA and commercial floorspace of up to 3,300 sqm GEA; and full planning application for 10,902 sqm (GEA) Class A1 retail anchor store as an extension to Westfield Stratford City (of which 1,814 sqm GEA is existing). It is assumed that all the remaining A1 floorspace (8,910 sqm GEA) is for comparison goods.
- **Zone 2: (International Quarter):** 2,438 sqm gross at Stratford Metropolitan Centre (including 1,495 sqm gross currently under construction). For the purposes of this assessment the floorspace will be split equally between A1, A3 and A4 uses i.e. 813 sqm gross each. It is assumed that the A1 floorspace is for convenience goods only.
- **Zone 3:** Hotel development under construction at N17 including supporting ancillary retail of 2,481 sqm gross (for A3/A4 uses).

Under East Village Local Centre

- **Zone 3, 4 & 5:** 6,280 sqm⁵² remaining retail floorspace (split equally in to A1/A2/A3/A4 uses) i.e. 1,570 sqm gross each. It is assumed that the A1 floorspace is split equally between comparison and convenience goods.

Other Stratford

- **17/00032/FUL - Westfield Stratford City, Montfichet Road, Queen Elizabeth Olympic Park, Stratford, E20 1EJ (Resolution to grant but pending final decision).** Extension to Westfield Stratford City (Phase 2) via the Removal of Level 10, Change of Use from Car Parking to Retail (Use Classes A1-A4 14,532 sqm GIA). It is assumed that of the proposed floorspace 80% will be for comparison goods and the remaining 20% for leisure (A3-A4) uses.

Legacy Communities Scheme

- **11/90621/OUTODA - Legacy Communities scheme covering seven Planning Development Zones** Development comprises up to 641,817 sqm of residential (C3) uses, including up to 4,000 sqm of Sheltered Accommodation (C3); up to 14,500 sqm of hotel (C1) accommodation; up to 30,369 sqm (B1a) and up to 15,770 sqm (B1b/B1c) business and employment uses; up to 25,987 sqm (A1-A5) shopping, food and drink and financial and professional services; up to 3,606 sqm (D2) leisure space and up to 31,451sqm (D1) community, health, cultural, assembly and education facilities, including two primary schools and one secondary school; new streets and other means of access and circulation. To note that this permission also covers relevant development at East Wick, Sweetwater and Pudding Mill. The relevant Reserved Matters permissions based on the current position at the time of writing this report are detailed at **Appendix 4** for reference.

For the purposes of this assessment, the maximum quantum of proposed retail floorspace for A1 uses is 13,940 sqm gross. From this floorspace, the quantum delivered under Chobham Manor Phases 1 and 2 (13/000504/REM - 745 sqm gross of A1-A5 floorspace and 14/00356 REM – 495 sqm gross of A1-A5 floorspace) has been deducted. On this basis the resultant floorspace is 12,700 sqm gross (2,540 sqm gross each for the following uses: A1; A2; A3; A4; A5) which has been used in this assessment. It is assumed that the A1 floorspace is split equally between comparison and convenience goods⁵³.

⁵² To note that this includes 1,603 sqm for all A Class uses (A1/A2/A3/A4/A5) outside the centre boundary at Plot NO6 (17/00045/REM) and some 1,350 sqm gross under construction at East Village at Plot N08 (14/00034/REM). The 1,350 sqm gross floorspace is split by A1/A2/A3/A4/A5 uses i.e. 270 sqm gross each.

⁵³ Also by way of reference some of the retail floorspace of the LCS scheme will be delivered within designated centres, namely:

>> Zone(s) 4 and 5 will also deliver retail within the Hackney Wick Neighbourhood Centre. The maximum floorspace proposed is for A1-A2 uses is 1,450 sqm gross (Zone 4) and 1,000 sqm gross (Zone 5); as well as A3-A5 maximum floorspace of 1,600 sqm gross (Zone 4) and 2,850 sqm gross (Zone 5).

>> Zone 8 - is the only plot relating to Pudding Mill with proposed uses in the order of: 1,200 sqm gross (A1 – A2 uses i.e. 600 sqm gross each) and 1,500 sqm gross (A3/A4/A5 uses - i.e. 500 sqm gross each).

Pudding Mill

- **15/00392/FUL - Land at Cooks Road, Pudding Mill Lane, Stratford, London, E15 2PW** - Mixed use redevelopment for 194 residential units, Proposed floorspace 300sqm (A2); 500sqm (A4); 8,170sqm (B1a); 1,310 sqm B1 flexible; 1,310 sqm (D1). For clarification this location is outside the Local Centre boundary.

Bromley-by-Bow

- **17/00344/FUL - Land at Imperial Street, Bromley by Bow, London, E3 3ED (Resolution to grant but pending final decision)**. Development of a mixed-use scheme for 407 residential units, 339 sqm of employment space and 274 sqm of flexible retail space (of which 91.3 sqm (A1); 91.3 sqm (A2) and 91.3 sqm (A3)). It is assumed that all the A1 floorspace will be for convenience goods.
- **17/00364/FUL - Land at Clockhouse and Access House, Imperial Street, Bromley-by-Bow, London, E3 3AE (Resolution to grant but pending final decision)**. Demolition of the existing buildings and the construction of a residential-led mixed use scheme comprising a series of buildings ranging from one to 27 storeys in height to provide 3,570 sqm of flexible community, commercial and retail floorspace (Use Classes A1, A2, A3, A4, B1 and/or D1) at ground and mezzanine floor level, 491 residential units (Use Class C3) on the upper floors, parking/refuse/servicing at basement and ground floor, energy centre, communal amenity areas, and all associated landscaped public open space. The LLDC has indicated that of the 712 sqm of A1 potential uses of which 178sqm (A1); 178 sqm (A2), 178 sqm (A3) and 178 sqm (A4). It is assumed that all the A1 floorspace will be for convenience goods.

Strand East⁵⁴

- **12/00336/LTGOUT - Strand East - Development Site Sugar House Lane Peninsula Sugar House Lane Stratford London**. Demolition of buildings to provide 1192 residential units (C3); 12,593 sqm flexible uses including retail (A1), financial and professional services (A2), restaurants, cafes and bars (A3/4), offices and workshops (B1), non-residential institution (D1) and assembly and leisure (D2); 33,950 sqm offices and works shops (B1); 350 bed hotel (C1); pedestrian bridge across Three Mills River; a riverside park; car, motorcycle and bicycle parking; servicing and ancillary works. To note that this application benefits from a number of Reserved Matters permissions (approved and pending) and these are detailed at **Appendix 4** for reference. For the purposes of this assessment, the maximum quantum of proposed retail floorspace for A1 uses in this overarching permission has been applied. On this basis the LLDC has indicated a potential floorspace quantum of 1,600 sqm gross for A1 uses and 2,000 sqm gross for A3 and A4 uses. It is assumed that the A1 floorspace is split 40% comparison goods and 60% convenience goods.

⁵⁴ To note that this is reference to a location and it is not a designated centre.

Hackney Wick

- **16/00166/OUT - Site known as 'Hackney Wick Central' (Resolution to grant but pending final decision).** Outline planning application for 28,281 sqm GIA of existing buildings on site and development of a phased comprehensive mixed use development of up to 119,242 sqm GIA. Residential (Use Class C3) of up to 78,931sqm. The LLDC has indicated 4,493 sqm gross (3,875 sqm net) of A1 uses proposed. Of the 3,875 sqm net of A1 uses, 969 sqm net each will be for A1; A2; A3 and A4 uses. It is further assumed that of the A1 floorspace will be for 40% comparison goods and 60% convenience goods. As detailed at **Appendix 4** there are a number of other permissions covering a range of plots within this boundary but for the purposes of this assessment the broad quantum of floorspace indicated above has been applied.
- **13/00534/FUM and 13/00536/COU (linked applications) at Here East - Site Comprising the International Broadcast Centre (IBC).** At the time of writing this report it has been confirmed that the proposed floorspace has been delivered and largely occupied and therefore not separately quantified in this assessment. By way of reference the applications relate to the modification to the International Broadcast Centre to provide flexible B1, B8, education space D1, and flexible uses (B1/A1, A3, A4, A5). The LLDC indicated the following quantum of completed floorspace: 1,125 sqm (A1); 1,596 sqm (A3), 1,596 sqm (A4), 1,956 (A5).

10.54 Table 2 in **Appendix 11** and **Appendix 12** sets out the predicted convenience and comparison goods turnovers of the permitted retail floorspace based on the available evidence, including Mintel's latest UK Retail Rankings Report). This turnover is discounted from residual expenditure in order to estimate net residual expenditure from which forecast new retail floorspace is identified.

Capacity Forecasts

10.55 The capacity forecasts will enable the LLDC to test the strategic options for the spatial distribution of new retail development over the period to 2036, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF (para 23). The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

10.56 It has necessarily been assumed for the purpose of this capacity assessment that the retail market (convenience and comparison goods) is in 'equilibrium' at the base year. In other words we assume that the existing centres and stores are broadly trading in line with their assumed 'benchmark' turnover levels. Therefore, any residual expenditure available to support new retail floorspace within the study area over the development plan period is derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace .

10.57 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate ranging from a low of -0.1% (2018) to +0.1% (2025 and onwards). The corresponding annual productivity growth rates for comparison floorspace are higher; ranging from +0.9% (2018) to an average of +2.2% (from 2024 onwards). These growth rates have been informed by Experian's latest RPBN15 and other research.

10.58 At the outset we advise that all capacity forecasts beyond a five year period should be treated with caution. This is because long term trends in the economy, consumer demand and retail property market could have a significant impact on the potential capacity and need for new retail floorspace. For example, as discussed previously, a higher growth in non-store retail sales (i.e. Internet sales) than forecast by Experian would reduce the capacity for new retail floorspace over time. It should also be noted that this strategic capacity assessment is based on a standard constant market share approach. It does not therefore take account of any potential uplift in market shares and capacity that could occur within catchment areas due to the 'claw back' of expenditure to planned new retail developments and investments in more convenient and sustainable town centre locations.

10.59 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the LLDC area based on the above analysis of population, expenditure and turnover growth over the forecast period, and the predicted trading performance of all known retail commitments. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendix 11** and **12** respectively.

Convenience Goods Retail Capacity Forecasts

10.60 In order to assess the potential capacity for new convenience goods floorspace up to 2036 we have necessarily tested two trading scenarios for different types and formats of food/convenience retailing in order to convert the residual expenditure (after taking account of new commitments) into a (net) sales area figure:

- **'Superstore format'** trading scenario - we have first assumed that the residual expenditure could support one of the 'top 6' foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer), which together could **achieve** an average **sales** density of approximately £12,000 per sqm in 2018 (2016 prices) based on the latest Mintel UK Retail Rankings; and
- **'Supermarket/discounter'** trading scenario - we have also tested the impact on the capacity forecasts of assuming the residual expenditure is taken up by a supermarket (e.g. Co-op, Budgens, etc.) and/or 'discount' retailer (principally Aldi and Lidl) trading at a slightly lower average sales levels of circa £7,500 per sqm in 2018. However, it should be noted that both Aldi and Lidl have increased their company average sales densities significantly over recent years due to their expansive store opening programmes and their increasing market share of the grocery sector. If this trend continues then we consider that the gap between the 'top 6' grocers and the main discounters will narrow further over time.

10.61 As stated previously, it has been assumed that the local retail market is in 'equilibrium' at the base year as there is no qualitative evidence to show that existing stores/floorspace are significantly over and/or under trading. We have also allowed for the year-on-year growth in the turnover 'efficiency' (floorspace 'productivity') of all new and existing convenience floorspace in line with the latest forecasts set out in Experian's Retail Planner Briefing Note 15 (Figure 4a).

10.62 Table 3 (**Appendix 11**) sets out the total residual capacity for new convenience goods floorspace in the LLDC area after allowing for the turnover of all known commitments. The table below summarises the convenience goods capacity forecasts in Table 3 (**Appendix 11**) for both new 'superstore format' and 'supermarket/discount format' floorspace:

Table 10.6: LLDC Area: Convenience Goods Forecasts

	2021	2026	2031	2036
FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:	-1,142	762	2,293	3,570
FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:	-1,827	1,220	3,669	5,712

10.63 The forecasts show no capacity for new convenience goods floorspace in the LLDC area between 2018 and 2021 after taking account of all known commitments. Over the medium term to 2026, capacity emerges of between 762 sqm net and 1,220 sqm net (representing two small convenience stores or one Aldi / Lidl type store), rising to between 2,293 sqm net and 3,669 sqm net by 2031 (either circa a smaller format superstore or two to three Aldi / Lidl type stores). By 2036, capacity emerges of between 3,570 sqm net and 5,712 sqm net (that could support two smaller format superstores or up to four to five additional Aldi or Lidl type of stores). To note that the forecasts are based on constant market shares and in this way do not take into account any changes in provision.

10.64 By way of comparison, the LLDC's previous assessment (RRLR 2014) forecast no convenience goods floorspace capacity over the assessment period to 2031.

10.65 The convenience goods capacity forecasts reflect the fact that at present there is a broad quantum of convenience floorspace that is already committed. This will inevitably contribute to the current provision which comprises of both superstore and discount formats as detailed in **Table 10.1** previously. New committed floorspace will enhance provision at a local level especially where it is part of a wider mixed use or residential led development. This is of relevance to the evolving status of emerging centres such as Bromley-by-Bow and Pudding Mill. Over the longer term to 2036 there is identified need and there will be a need to identify and allocate new sites for new convenience goods floorspace especially as part of the development of emerging centres. If sites cannot be identified either in or on the edge of existing centres then the LLDC will need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the robust assessment and determination of any future applications for new retail floorspace proposed outside of centres and not in accordance with an up-to-date development plan.

Comparison Goods Retail Capacity Forecasts

10.66 Table 3 (**Appendix 12**) sets out the total residual capacity for new comparison goods floorspace in the LLDC area (including the whole of the Metropolitan Centre) after allowing for the turnover of all known commitments. The table below summarises the comparison goods capacity:

Table 10.7: LLDC Area: Comparison Goods Forecasts

	2021	2026	2031	2036
FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE:	-9,985	20,048	50,180	79,852

10.67 The capacity forecasts are based on the reasonable and robust assumption that new floorspace will achieve an average sales levels of circa £6,000 per sqm in 2018⁵⁵. It is also assumed that all new and existing floorspace will experience a year-on-year growth in turnover 'efficiency' (floorspace 'productivity') in line with the latest forecasts set out in *Experian's Retail Planner Briefing Note 15* (Figure 4b).

10.68 The table shows limited capacity for new comparison goods floorspace between 2018 and 2021 after allowing for all known commitments. Capacity emerges by 2026 of 20,048 sqm net; 50,180 sqm net by 2031 and 79,852 sqm net by 2036. By way of reference, the LLDC's previous assessment (RRLR 2014) forecast comparison good floorspace capacity of 15,500 sqm net by 2021 rising to 39,300 sqm net by 2026 and 61,300 sqm net by 2031.

10.69 Given the scale of need forecast up to 2036, we advise that the need to identify sites in and/or on the edge of Stratford and the local / neighbourhood (current and emerging) centres of Bromley-by-Bow, Hackney Wick, East Village, Pudding Mill to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23). If sites cannot be identified either in or on the edge of existing centres then the LLDC will need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the robust assessment and determination of any future applications for new retail floorspace proposed outside of centres and not in accordance with an up-to-date development plan.

Summary

10.70 This section has assessed the potential (economic) capacity for new retail (convenience and comparison) good floorspace in the LLDC area between 2018 and 2036.

10.71 It is important to restate that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The LLDC should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus). To note that the 2018 draft NPPF consultation document provides that LPAs should plan for need at least ten years ahead (para 86d).

⁵⁵ The average sales density of circa £6,000 per sqm at 2018 is assumed to be broadly equivalent to the average sales performance of retail units in prime shopping locations, and has been informed by different research evidence including the latest Mintel UK Retail Rankings Report. However, average turnover levels do inevitably vary between different locations, different retail formats and different operators. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The LLDC will therefore need to take this into account when considering applications for different operators and different types of retail floorspace in edge and out of centre locations. For example 'bulky goods' DIY retail warehouse operators typically trade at lower average sales levels, whereas electrical goods retailers and some fashion operators can achieve much high average turnover levels.

- 10.72 Notwithstanding these caveats, the capacity forecasts do nevertheless provide a broad framework to help inform plan-making across the LLDC area, including the potential need to identify and allocate sites for new retail floorspace in the identified centres.
- 10.73 The aggregated 'global' capacity forecasts show there is no need for new convenience goods floorspace over the period to 2021. Capacity emerges by 2026 between 762 sqm net and 1,220 sqm net (representing two small convenience stores or one Aldi / Lidl type store), rising to between 2,293 sqm net and 3,669 sqm net by 2031 (either circa a smaller format superstore or two to three Aldi / Lidl type stores). By 2036, capacity emerges of between 3,570 sqm net and 5,712 sqm net (that could support two smaller format superstores or up to four to five additional Aldi or Lidl type of stores)
- 10.74 The identified convenience goods capacity is likely to be accommodated primarily within the current and emerging centres especially as part of commercial provision in residential led development and regeneration schemes.
- 10.75 For comparison goods no floorspace capacity is forecast between 2018 and 2021 after allowing for all known commitments. Capacity emerges by 2026 of 20,048 sqm net; 50,180 sqm net by 2031 and 79,852 sqm net by 2036.
- 10.76 By way of reference, the LLDC's previous assessment (RRLR 2014) forecast comparison good floorspace capacity of 15,500 sqm net by 2021 rising to 39,300 sqm net by 2026 and 61,300 sqm net by 2031.
- 10.77 In terms of the future allocation of the identified capacity, Stratford Metropolitan centre will remain at the apex of the hierarchy and the main point of investment focus and therefore it can be assumed that up to 80% of the identified forecast capacity for comparison goods will be located here. In this way, other centres existing or emerging, these centres are likely to accommodate the remainder (20%).
- 10.78 In conclusion, the NPPF (paragraph 24) states that, in drawing up Local Plans, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure and other main town centre uses "*are met in full and are not compromised by limited site availability*" and local planning authorities should therefore "*undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites*".
- 10.79 Where suitable and viable town centre sites are not available, the NPPF states that local planning authorities should "*allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre*". If sufficient edge of centre sites cannot be identified, then local planning authorities should set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

11. COMMERCIAL LEISURE NEED / 'GAP' ASSESSMENT

11.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, local planning authorities should promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres.

11.2 Against this background leisure uses can make a significant contribution to a town centre's vitality and viability. For example, a good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover in centres, with significant benefits for both daytime and evening economies.

11.3 However, forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing, as the sector is highly complex and dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and less sophisticated than for retail capacity forecasts.

11.4 The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis focuses on the following key elements:

- a review of the key trends driving market demand in the sector over the last decade;
- an audit of existing commercial leisure uses in the LLDC and surrounding traditional Stratford area only to help identify any marked 'gaps' in provision;
- a review of the survey results from Opinion Research Services (ORS Survey) for the LLDC⁵⁶ on the usage of local facilities to understand preferences within the LLDC area; and
- a broad economic assessment of the need for new additional leisure.

11.5 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that are widely accepted as making a significant contribution to the overall vitality and viability of town centres; namely food and beverage uses (Class A3-A5), cinemas and health clubs and gyms, and to a lesser extent ten-pin bowling, casinos and bingo halls.

11.6 Detailed tables on forecast commercial leisure capacity, including projections on expenditure and need are set out below.

Leisure Expenditure Growth

11.7 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

⁵⁶ Opinion Research Services: Local Plan Population Forecast Model Review 2017 – Residents Data (November 2017). To note that the ORS Survey covers the geographic area of the LLDC area only and this way the responses are from the local residents only. Additionally the survey covers only a few elements of leisure provision and the responses are referenced where relevant in the remainder of this section.

11.8 The table below shows the UK average expenditure per head per annum on commercial leisure services and the average for the defined study area based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across the LLDC area.

Table 11.1 Estimates of Expenditure per Capita on Leisure Services in 2018

	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
LLDC AREA	£244	£175	£79	£56	£124	£1,012	£1,690
(% of Total)	14.4%	10.3%	4.7%	3.3%	7.4%	59.9%	100.0%
UK Average (£)	£200	£277	£240	£88	£104	£1,002	£1,912
(% of Total)	10.5%	14.5%	12.6%	4.6%	5.5%	52.4%	100.0%

Source: Experian, 2016 prices.

11.9 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in *Retail Planner Briefing Note 15* (December 2017). EBS forecasts shows a decreasing growth forecast in the short term (2016-2018) before stabilising over the longer term (from 2019) to between +1.1% and 1.2% per annum. This forecast growth is higher than annual average historic growth rates for the period 1997-2015, when there was no growth in leisure spend.

Table 11.2 Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2015	2016	2017	2018	2019	2020-2024	2025-2036
Leisure Spend Growth (%)	1.7	0.7	0.3	-0.1	0.8	1.1	1.2

Source: Experian Business Strategies, Retail Planner Briefing Note 15 (December 2017), Figure 1a and 1b

11.10 The base year expenditure per capita levels for leisure (**Table 11.1**) have been projected forward to 2036 using Experian's forecast annual growth rates (**Table 11.2**), and then applied to the projected population for the LLDC area only to identify the total available expenditure on leisure and recreation goods and services locally (**Table 11.3**).

Table 11.3 Total Forecast Growth in Commercial Leisure Expenditure: 2018 – 2036 (£m)

Zone	2018 (£m)	2021 (£m)	2026 (£m)	2031 (£m)	2036 (£m)	Change: 2018-2036 (£m)	Change: 2018-2036 (%)
LLDC AREA	48.5	79.5	137.9	188.0	226.0	177.5	366.2%

11.11 The available commercial leisure expenditure across the LLDC area is forecast to increase by 366.2% (+£177.5m) up to 2036.

11.12 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to enhance the scale and quality of Class A3-A5 uses in the LLDC area and its emerging centres over the development plan period, subject to market demand. In the light of the potential changes to the designation of Stratford to an International centre, new schemes and proposals such as at Stratford Waterfront (a new Cultural and Education District) will greatly contribute to this provision, attraction and designation.

11.13 Against this background, the following commentary identifies the potential 'gaps' in the commercial leisure offer and the likely need for new uses and facilities over the forecast period.

Cinema Capacity

11.14 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld (the UK's largest operator, with over a quarter of the cinema box office market), Odeon/UCI; Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC; Vue acquired the Apollo cinema chain; and Cineworld acquired Picturehouse. This trend of acquisition and consolidation in the sector is set to continue over the short term in our view.

11.15 According to research by Dodona (a specialist market research consultancy in the cinema industry) at the end of 2016, the UK had 4,015 screens, 140 more than 2014, in 766 cinemas in the UK. Approximately three-quarters (77%) of the screens are in multiplexes. It should be noted that the number of cinemas has fluctuated, with a low of 697 in 2006 and a high of 769 in 2012. This has been influenced by the increase in the number of multiplex screens and the loss of 'traditional' cinemas. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than six screens) and screens in mixed-use venues (such as arts centres); including The Light, Curzon and Everyman cinemas. Everyman cinema reported in 2017 that demand for its "*home from home*" experience is growing around the UK with new opening planned for 2018 venues in York, Liverpool and Newcastle, as well as London's Borough Market in 2020.

11.16 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health and the UK is the second largest consumer market for filmed entertainment in the world after the USA. The latest research shows that box office revenue in 2015 in the UK exceeded £1.2bn for the fifth year in succession, based on 168.3m admissions. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

11.17 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the 'Screening Room' concept, characterised by leather chairs and table service.

11.18 The most recent change to the industry – the transition to digital cinema technology – was one of the most fundamental shifts in the history of the sector, and has allowed the traditional cinema offer to expand to give audiences even greater choice in what they see. There has also been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry", as they do not require the large shopping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for modern cinema offer to be provided in existing buildings. Examples include the HMV in

Wimbledon which has a small Curzon cinemas above the store; Genesis, Whitechapel; The Grosvenor, Glasgow; Watershed, Bristol and the Lynton Cinema, Lynton.

11.19 At the other end of spectrum, smaller, boutique cinemas are also performing well. Focused on comfort, often by offering higher quality food, alcohol and larger reclining seats, and holding special screening events, these cinemas typically appeal to demographic that differs to that of the multiplexes. However, a further category of film screening has started to emerge: event cinema. Mirroring trends in retail, people are prepared to pay significantly more for a unique, bespoke film experience – particularly one that lends itself to be shared on social media such as Secret Cinema.

11.20 Turning to the cinema provision in the LLDC and broader Stratford area, there are two commercial purpose-built cinemas:

- Vue, Westfield Stratford City (20 screens)
- Picture House, Salway Road (4 screens)

11.21 The results of the ORS Survey on the usage of local facilities in the LLDC area indicates that some 39% of households visited a cinema. A standard accepted approach used to assess the current level of cinema provision and future needs is based on national and regional ‘screen density’ averages (i.e. the number of screens per unit of population). According to Dodona, in 2016, the UK average was 6.4 screens per 100,000 people and 6.7 screens per person in London. The table below shows the requirement for additional cinema screens across the study area, based on applying broad assumed LLDC area retention rate of 39% to the forecast growth in the area population.

11.22 The table shows that there is no quantitative need for new cinema screens over the study period to 2036 based on current local participation rate. This is even after applying a more aspirational UK national average screen density of 6.7 screens per 100,000 people.

Table 11.4: Potential Capacity for New Cinema Screens 2018-2036

	2018	2021	2026	2031	2036
Potential Cinema Catchment Population	11,196	17,820	29,218	37,525	42,489
Cinema Screen Density (screens per 100,000 persons) based on London	6.7	6.7	6.7	6.7	6.7
Cinema Screen Potential	1	1	2	3	3
Existing Screens	24	24	24	24	24
Proposed Screen Potential	0	0	0	0	0
Net Screen Potential	-23	-23	-22	-21	-21

Eating & Drinking Out

11.23 The food and beverage sector, including restaurants, cafes, bars and pubs (Class A3, A4, and A5), provide an increasingly important part of the town centre’s wider offer and economy. They also complement other town centre uses, particularly shops, offices and cinemas, helping to lengthen ‘dwell times’ (the time people spend in centres) and increase expenditure as part of the same trip.

11.24 As highlighted in **Section 3**, average household expenditure on leisure services in the UK is largely dominated by eating and drinking out. This sector has remained buoyant over time and the year-on-year forecasts for growth by Experian are strong.

11.25 The following provides a summary of some of the key trends driving changes in the food and beverage sector over recent years.

- **Pubs and Wine Bars** – Pub operators have widened their food and non-alcoholic beverage offer, resulting in the growth of so-called “gastro-pubs” in competition with more established restaurants, and the rise in ‘micro pubs’. Notwithstanding this the sector has also been characterised by increasing consolidation and closures. Recent research by CAMRA also suggests that on average around 21 pubs closed every week in the UK between June and December 2015. The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury’s Local).
- **Restaurants** – This sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include an increase in ‘eating at home’, which has increased sales for take-aways and deliveries. At the same time customers are increasingly basing their decisions to eat out on ‘value for money’, but not at the expense of quality in terms of service, food and the overall experience. Recent successes include Bill’s and Cote, with branded restaurants increasing their share in the market. There has also been a growth in ‘all-you-can-eat’ style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread). In broad terms, and according to recent research⁵⁷, future F&B growth is most likely to be dominated by multiple operators expanding their presence across the UK.
- **Cafes/Coffee Shops** – This sector has experienced strong growth over the last five years. According to Mintel research, the UK coffee shop market rose by 37%, up from £2.4 billion in 2011 to reach £3.4 billion in 2016. Additionally, between 2015 and 2016 sales increased by 10.4% – the biggest year-on-year boost witnessed in the last five years. The market over the next five years is forecast to grow a further 29%, to reach £4.3 billion⁵⁸. Estimated at 22,845 outlets, the total UK coffee shop market delivered a growth of 6% in outlets in 2016. Costa Coffee, Starbucks Coffee Company, and Caffè Nero remain the UK’s leading chains with a 53% outlet share of the branded coffee shop market. Market leader Costa operates 2,121 UK outlets, adding 129 units in 2016, and Starbucks and Caffè Nero operate 898 and 650 UK outlets respectively. Leading chains continue to expand and enjoy positive like-for-like sales growth, albeit at a slowing pace. However small and medium sized boutique chains such as Coffee#1, Joe & the Juice, and Taylor St. Baristas are gaining momentum and driving the comparable sales growth across the sector, ahead of the leading chains. Increased merger and acquisition activity throughout 2016 signifies the strength of the vibrant coffee shop market in the UK. Activity such as Whitbread’s 49% acquisition of Pure; Tchibo’s acquisition of Matthew Algie; and Caffè Nero’s purchase of Harris+Hoole signals further market convergence⁵⁹. Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade). The strong independent coffee sector has fuelled many new start-up businesses in local

⁵⁷ Cushman & Wakefield – UK Food & Beverage Market Sustainable Growth – H1, 2017

⁵⁸ Grande growth: UK coffee shop sales enjoy a growth high – Mintel (12/04/2017)

⁵⁹ UK Coffee Leader Summit - Project Café 2017 UK, by Allegra Strategies, ‘Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local’ (20/01/2017)

centres. While many forecasters considered the café market to be saturated a few years ago, Allegra⁶⁰ reveals that after 18 years of considerable continued growth, the coffee shop market is one of the most successful in the UK economy and is set to outnumber pubs by 2030 as coffee shops become the new local.

11.26 Within the LLDC area there is a very broad provision for eating and drinking out. This is exemplified by the venues at Westfield Stratford City which include bars and cafes, fast food outlets and restaurants such as Enrique Tomas, Pasta Remoli, Umai by Japan Centre, Wahaca, Yo! Sushi, The Real Greek, Jamie's Italian, Indi-Go, Las Iguanas, Compoir Libanais, Tanzibar, Bumpkin amongst a range of others. A total 65 restaurants is a key provision and attractor to the centre. The diverse nature of the commercial leisure offer at Westfield Stratford City is supplemented further by the independently run provision including: the 'hipster' cafés at Hackney Wick such as 'Grow' (a bar) and 'Number 90', a range of restaurants at Here East (Gotto – Italian, Randy's Wing Bar, Shane's on Canalside, The Breakfast Club) and at East Village (Bottle Apostle, Darkhorse, Firezza, Fish House, Ginger and Mint, La Gelatiera Mamalan, RedYellowBlue Santi, Signorelli amongst others). Additionally within old Stratford there are a range of fast food and independently operated outlets. The combination of the commercial and independent represents a significant and diverse range of provision that benefits local residents and beyond the LLDC area with no significant gaps in provision.

11.27 The ORS Survey conducted for the LLDC asked respondents '*which leisure venues have you visited within the last month*'. The highest responses were received for 'independent bars / restaurants' (58%) and 'chain bars/restaurants' (42%). Furthermore the ORS Survey also asked '*where do you most often go for leisure activities*'. Due to the provision described previously it is no surprise that venues within the LLDC had a retention level of 72.4% with Westfield Stratford City being the most popular (49.5%).

Table 11.5: Popular Leisure Locations

Location	%
Westfield Stratford City	49.5
Stratford Centre	5.1
East Village	4.4
Hackney Wick	7.2
Other part of my immediate neighbourhood	6.1
Sub-total	72.4
West End	7.9
Other part of London	18.7
Sub-total	26.6
Not Applicable	1.1
Overall Total	100.0

Source: ORS Survey

⁶⁰ Allegra, 'Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local' (20/01/2017), Ibid

11.28 Turning to the potential need for new F&B uses (floorspace), the table below shows that the total available expenditure for food and drink in the LLDC area is £29m in 2018 and this is predicted to increase by 366.2% (+£106.3m) over the plan period to £135.3m at 2036.

Table 11.6: Total Leisure Spend (£m)

	LLDC Area: Total Leisure Spend (£m)					Change:	Change:
	2018	2021	2026	2031	2036	2018-2036 (£m)	2018-2036 (%)
Accommodation	7.0	11.5	19.9	27.1	32.6	£25.6	366.2%
Cultural services	5.0	8.2	14.2	19.4	23.3	£18.3	366.2%
Games of chance	2.3	3.7	6.5	8.8	10.6	£8.3	366.2%
Hairdressing salons & personal grooming	1.6	2.6	4.6	6.2	7.5	£5.9	366.2%
Recreational & sporting services	3.6	5.8	10.1	13.8	16.6	£13.1	366.2%
Restaurants, cafes, etc.	29.0	47.6	82.6	112.6	135.3	£106.3	366.2%
Total	48.5	79.5	137.9	188.0	226.0	£177.5	366.2%

11.29 The ORS Survey has indicated that the LLDC area collectively has a strong retention level (72.4%) for eating and drinking out. An appropriate strategy should seek to maintain and, where possible, increase this market share over the forecast period to 2036.

11.30 On this basis, the available expenditure has been projected forward to 2036 and any residual expenditure available to support new A3-A5 floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers after applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing floorspace of 1% per annum.

11.31 The resulting residual expenditure has been converted into floorspace projections using a 2018 average assumed sales density of £5,000 per sqm net (inflated by 1% per annum over the period to 2036). This reflects our judgement of the potential range of turnover levels achieved by food and beverage operators across the UK, based on the available evidence and market intelligence. The analysis also takes in to account the following extant commitments:

- **10/90641/EXTODA** – This refers specifically to:
 - **Zone 2:** International Quarter - A3-A4 uses, the total quantum as indicated by the LLDC is 1,626 sqm gross.
 - **Zone 3:** Hotel development- A3-A4 uses, the total quantum as indicated by the LLDC is 2,481 sqm gross.
 - **Zone 3, 4 & 5:** Remainder A3-A4 uses, the total quantum as indicated by the LLDC is 3,140 sqm gross.
- **17/00032/FUL - Westfield Stratford City**, Montfichet Road, Queen Elizabeth Olympic Park, Stratford, E20 1EJ (Resolution to grant but pending final decision). It is assumed that 2,906 sqm gross (20% of the overall proposed 14,532 sqm gross will be for A3-A4 uses).

- **11/90621/OUTODA - Legacy Communities Scheme** covering seven Planning Development Zones Development as described previously. The proposed quantum A3, A4 and A5 uses equates to 7,620 sqm gross.
- **15/00392/FUL** - Land at Cooks Road, Pudding Mill Lane, Stratford, London, E15 2PW - Mixed use redevelopment for 194 residential units, 2,136sqm of commercial floorspace (A1-A3 / B1 / D1 / D2). Quantum of A4 uses proposed equates to 500 sqm gross.
- **17/00344/FUL** - Land at Imperial Street, Bromley by Bow, London, E3 3ED (Resolution to grant but pending final decision). The proposed A3 quantum is 91.3 sqm gross.
- **17/00364/FUL** - Land at Clockhouse and Access House, Imperial Street, Bromley-by-Bow, London, E3 3AE (Resolution to grant but pending final decision) as described previously. The proposed A3 and A4 quantum is 356 sqm gross.
- **12/00336/LTGOUT** - Development Site Sugar House Lane, Peninsula, Sugar House Lane, Stratford as described previously. Quantum of A3 and A4 uses proposed equates to 2,000 sqm gross.
- **16/00166/OUT** - Site known as 'Hackney Wick Central' (Resolution to grant but pending final decision, described previously. Quantum of A3 and A4 uses proposed equates to 1,938 sqm net.

11.32 As shown below, due to the turnover of commitments generated by the above there is no additional identified capacity over the period to 2036. Notwithstanding this, and in undertaking this analysis it should be noted that this only covers the LLDC area in terms of the population, expenditure and retention of leisure retention. However, in reality the pool of leisure expenditure will be wider. Furthermore with the potential for future International Centre designation, the provision will be enhanced further. In simple terms the more successful, vital and viable Stratford and its satellite centres become, the more likely it will be that café and restaurant operators will want to locate there. As the analysis has shown there is already a relatively strong demand and retention from within the LLDC area which is likely to be supplemented further as the centre draws and capitalises on its future international designation.

Table 11.7: Need for New Food & Beverage Floorspace in the LLDC Area (sqm)

	2021	2026	2031	2036
Total Available Expenditure in LPA Area (£m)	47.6	82.6	112.6	135.3
Current retained turnover (£m)	34.5	59.8	81.5	98.0
Benchmark turnover (£m)	21.6	22.8	23.9	25.1
Net Residual Excluding Commitments (£m)	12.8	37.0	57.6	72.8
Turnover of Committed Floorspace (£m)	84.7	89.0	93.6	98.3
NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: (£m)	-71.9	-52.0	-36.0	-25.5
Capacity (sq m gross) based on a sales density of: £5,000/sqm net	No Capacity	No Capacity	No Capacity	No Capacity

Health & Fitness Need

11.33 The health and fitness market has generally performed well during the economic downturn. The latest statistics from the Leisure Database Company (LDC) show that over the twelve month period to March 2016, the industry has grown its total market value by +5.3% to £4.4 billion, and its member base has also grown by +5.3%. According to LDC there were an estimated 6,435 private health clubs and public fitness centres facilities in the UK in 2016, which represented a small +1.9% net increase from 6,312 facilities the previous year. The main operators in the market currently include:

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
- Nuffield Health (previously Cannons) & Virgin Active – dominate the mid-range family-orientated health; and fitness market (Nuffield acquired 35 Virgin Active gyms in 2016);
- LA Fitness, Fitness First and Bannatyne’s Health Clubs – operate smaller in-centre clubs at the more value end of the market; and
- Within London smaller ‘boutique’ gyms are popular, such as Soho Gyms, which have facilities across the City.

11.34 The most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of (“no frills”) fitness clubs is growing steadily and lead by Pure Gym, which opened 60 clubs across the UK in 2015. Other popular low cost brands include EasyGym, Fitness 4 Less, Fitspace, TruGym, and SimplyGym. The low cost business models is based on 24-hour opening, discounted monthly subscriptions (of between £10 and £20 on average) and ‘pay as you go’ membership. According to LDC, the low cost gym sector now accounts for 12% of total private clubs and 32% of private sector membership.

11.35 Overall, the proportion of the population in 2016 with a gym membership was estimated at 14.6%, up from 13.7% in 2015. According to LDC, the average number of members per club in the UK is estimated to be 1,426, which includes the average for independent venues (726 per club) and larger leisure chains (2,198 per

club). For the larger fitness chains (e.g. David Lloyd, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members⁶¹.

11.36 The history and origin of the LLDC area is interlinked with the London 2012 Games and the creation of the QEOP. In this way there are a range of inherited health and fitness facilities that provide modern amenities to the local population including:

- London Aquatics Centre – the centre provides community swimming facilities in an Olympic sized pool for the same price as local leisure centre swimming pools;
- The Copper Box Arena – which hosted the handball, modern pentathlon fencing and goalball during the 2012 Games, is now a flexible indoor venue that has a state-of-the-art sports hall with gym operated by Better Gym.
- The Lee Valley Hockey and Tennis Centre include two hockey pitches, four indoor tennis courts and six outdoor courts, available for public use.
- The Lee Valley VeloPark is another legacy venue that provides four types of cycling in one place: Track cycling, road racing, BMX and mountain biking

11.37 The above provision is supplemented by commercial operators providing health and fitness facilities including:

- Gymbox
- Anytime Fitness
- Strong + Bendy Yoga and Pilates Studio

11.38 The above indicates that there is good provision of public facilities of scale and of international repute which are publicly accessible. This is supplemented by commercial health and fitness operators.

11.39 The ORS Survey for the LLDC indicates that in terms of participation in sports, physical activity and other forms of exercise the most popular venues are the facilities within the QEOP 12.6% followed by Better Gym (East Village) 10.2% as shown in **Table 11.8**. The broad rate of participation from the survey is 35.1%. In addition, and according to the same survey, the majority of the respondents (83.1%) frequented these facilities at least once a week if not more.

⁶¹ Sourced from the 2014 State of the UK Fitness Industry, the Leisure Database Company.

Table 11.8: Health & Fitness Participation (%)

Location	%
Facilities within QEOP (Aquatics, Copperbox, Velopark, LV Hockey & Tennis Centre)	12.6
Gymbox Westfield	4.9
Better Gym East Village	10.2
Other local sports facility	7.3
Sub-total	35.1
Other sports facility in London	5.3
Hackney Marshes Leisure Centre	1.3
None	58.3
Sub-total	64.9
Overall Total	100.0

Source: ORS Survey

11.40 In terms of the need for new health club/ gym facilities, by applying the participation rate for gym and health club activities identified in the ORS Survey (35.1%) to the projected growth in the LLDC area population of 80,239⁶² up to 2036 will result in some 28,153 potential new gym members over this period. Based on average membership levels for key commercial gym operators such as David Lloyd and LA Fitness (which average 2,897 average members per facility) or a budget gym (which 3,452 average members per facility) this quantum is able to support up to 10 commercial gyms or 8 budget gyms over the forecast period. Future market demand from gym operators⁶³ seeking representation should be directed to town centres first in accordance with national and local plan policy objectives.

Bingo & Gambling Needs

11.41 Gambling represents a significant element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/ demand for new facilities in the LLDC area, if any, based on the available evidence.

11.42 In terms of Bingo Halls, the latest research by The Gambling Commission (Industry Statistics November 2015) indicates that there are over 599 licensed premises in operation in the UK, which is a reduction from 653 recorded in 2014. Gala Leisure and Mecca Bingo are the leading operators accounting for over a third (36.9%) of all premises. Research by Mintel indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming. In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and growth in 'remote/online' gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly

⁶² Based on LLDC population projections for the LLDC area: 2018 – 28,707 and 2036 – 108,946. Increase of +80,239 (279.5%)

⁶³ Refer to Appendix 3 for potential gym operators seeking space in the Stratford area

looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. The above has resulted in the closure of many bingo halls across the UK. The nearest commercial bingo facility is the Gala Bingo on Stratford High Street.

11.43 For **Casinos** research shows that there were some 147 in the UK in September 2015. The number of premises has remained fairly static over the past five years⁶⁴. This sector is dominated by two companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casinos) and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group's purchase of Gala Coral Casinos making it the largest operator in the UK. While casino attendance has grown from 18.24m in 2012 to 20.44m in 2015, attendance dropped by 2.6% from 2014 (20.99m). The increase in attendance since 2012 is largely explained by larger new casino venues granted licences under the 2005 Gambling Act. Within the LLDC area the key venue is Aspers at Westfield Stratford City.

11.44 **Betting shops** do represent a growing market in the gambling sector and are ever present on the UK's high streets. There are approximately 9,000 betting shops in the UK, of which around half are operated by Ladbrokes and William Hill. Regulatory changes in 2015 led to a fall in revenue and profit. In response, William Hill announced their intention to close 150 of their 2,300 outlets. As gambling activities continue their shift to online channels, demand for physical outlets could dampen in the future. The presence of betting shops in high streets is a contentious issue, particularly the perceived social issues that are linked to this particular activity (e.g. anti-social behaviour) and their concentration in deprived areas. The Government has recognised that betting shops have specific impacts and in 2016 reclassified betting shops from A2 to Sui Generis use. This reclassification gave local authorities greater control on managing the number of outlets and therefore greater potential to limit impacts associated with betting shops. There are a number of betting shops in the traditional Stratford area.

11.45 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the town centre first. Given that current trends for bingos and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited.

Other Commercial Leisure Needs

11.46 Other commercial leisure facilities can be grouped together under 'family entertainment' venues which include paid activities that appeal to adults and children; such as, for example, tenpin bowling, roller skating, ice skating, and similar uses.

11.47 **Tenpin bowling** is possibly the most popular of this category and has been established as a commercial leisure activity in the UK for over 40 years. It remains a strong family and group activity. Research shows that there are

⁶⁴ Source: Gambling Commission Industry Statistics 2016.

currently over 321 bowling centres in the UK⁶⁵. This sector benefitted from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. Bloomsbury Bowl Lanes also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

11.48 There is one main ten-pin bowling facility located in the LLDC area namely All Star Lanes, Westfield Stratford City (14 Lanes). This is a popular venue of its type in the area.

Cultural Activities

11.49 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment, consideration is given to the provision of theatres, music venues, and historic/cultural attractions across the LLDC Area.

11.50 Cultural venues in the LLDC and Stratford area are extensive and are set out below.

11.51 The QEOP – Represents the broad LLDC area and is the home to the London Stadium, the ArcelorMittal Orbit (the world's longest and tallest tunnel slide and the UK's highest freefall abseil), the London Aquatics Centre, the Copper Box Arena, Lee Valley VeloPark and Lee Valley Hockey and Tennis Centre – as well as parklands, waterways, playgrounds and cafes. The critical mass and variety draws in both local residents, those in East London and beyond. It therefore represents a key draw and opportunity for future provision. It is noted that part of the cultural legacy will be delivered through the creation of a world class Cultural and Education District on the Park that will bring together outstanding organisations to showcase art, dance, history, craft, science and technology.

11.52 The Cultural and Education District will be made up of two sites on the Park, clustered around the iconic Stadium, ArcelorMittal Orbit and London Aquatics Centre. Furthermore a number of world-class institutions have already made plans to set up a permanent presence on these two sites. UCL East will be the site of a new university campus for University College London (UCL), while Stratford Waterfront features a new campus for the University of the Arts London, along with major new spaces for the Victoria and Albert Museum and Sadler's Wells. Additionally It is noted that discussions⁶⁶ are also underway between the Smithsonian and the Victoria and Albert Museum to work together to create a major new international collaboration. The development of this type is likely to enhance the tourism profile of the area.

⁶⁵ Source: <http://talktenpin.net/>

⁶⁶ <https://www.vam.ac.uk/info/futureplan>

11.53 In terms of usage the ORS Survey yields that QEOP is the most visited amongst residents (65.9%), followed by Victoria Park (15.6%).

Table 11.9: Parks and Open Spaces Visitation (%)

Location	%
Queen Elizabeth Olympic Park	65.9
Hackney Marshes	1.9
Victoria Park	15.6
West Ham Park	2.8
Victory Park, East Village	2.2
Three Mills Green	1.1
Linear Park, Hackney Wick water	0.1
Greenway	0.6
Carpenters Estate open space	0.1
Local playgrounds	0.8
Other park or open space within :	1.4
I don't use any of these	7.6
Overall Total	100

Source: ORS Survey

11.54 According to the ORS Survey, the predominant reason(s) for visiting the open space / park is either 'to relax' (73%) followed by 'to get out and enjoy the green space' (39.3%).

11.55 The provision at the QEOP is supplemented further by additional cultural provision in the form of a number of art galleries at Hackney Wick including Stour Space (an abandoned building turned multi-functional creative venue, with studios, galleries and a café), The Number Gallery (exhibiting up and coming London artists) all of which provide a café/bar/restaurant that enhances the provision further.

11.56 In terms of theatre provision, Theatre Royal Stratford East (located within traditional Stratford) is a 460-seater community theatre that produces new theatre shows and comedy. As a cultural facility it has been the home of the Theatre Workshop company since 1953. This is supplemented by the Yard Theatre at Hackney Wick. This is a 110-seat community theatre and music venue in a converted warehouse staging contemporary drama.

11.57 From the above it is clear that the range of venues and facilities of cultural interest are numerous and varied across the LLDC area and this contributes significantly locally and to the broad visitor economy and profile of the area.

11.58 At the time of writing this report, emerging press reports⁶⁷ indicate the potential of a concert venue at Chobham Farm South which has been identified for a major leisure use. It is noted that at this stage it remains speculative. Notwithstanding this, it clearly indicates the importance of this site as having significant leisure potential and Stratford overall as a cultural and tourism destination.

⁶⁷ 'The Golf Ball: the next addition to London's skyline?' - The Guardian (24/01/2018)
<https://www.theguardian.com/artanddesign/2018/jan/24/the-golf-ball-the-next-addition-to-londons-skyline>

Hotel Provision

11.59 There is a good provision of overnight accommodation available in the LLDC and broader Stratford area. This includes hotels served by national and independent operators. We have compiled a list of a selection of hotels based on available information below:

- Holiday Inn, Westfield Stratford City
- Premier Inn, Westfield Stratford City
- Staybridge Suites, Westfield Stratford City
- Moxy London, Stratford
- Marlin Apartments, Stratford
- Ibis, Stratford
- The Westbridge Hotel, Stratford
- Travelodge, Stratford
- Holiday Inn Express, Stratford
- Epsilon Hotel
- Stratford Hotel
- London Olympus Hotel

11.60 We consider that the LLDC area is well served by a range of national and independent operators. Notwithstanding this, as the LLDC area develops further with increasing critical mass of education, employment and leisure it will continue to develop into an important tourist destination. In this way there may be potential opportunities for growth in this sector. It is further observed that a range of the commitments listed at **Appendix 4** also specify the potential for additional hotels⁶⁸ that will add to the current provision.

11.61 As detailed in the accompanying report on Creative and Cultural Opportunities⁶⁹, hotels could provide an opportunity to drive custom for a cultural offer and can act as an identifier and anchor for the area as well as help deliver the additional supply identified by the GLA. Further visitor accommodation located in the north of the QEOP could help support existing leisure and event venues such as the; Copper Box Area, Velopark and the Hockey & Tennis Centre. Visitor accommodation at Pudding Mill could stimulate demand for night-time and leisure activity along Stratford High Street. In Hackney Wick and Bromley-by-Bow, future visitor accommodation would be integral to the evolution of the cultural offer. The location of new hotel provision and scale is determined by NPPF and LLDC Local Plan requirements, however given the significant role of the Metropolitan Centre in the overall hierarchy it is anticipated that large scale development is likely to be located here in the first instance.

Conclusion

11.62 Our review of the commercial leisure sector focuses on the quantitative need for new cinema screens, food and beverage provision, and health and fitness facilities.

⁶⁸ Such as 10/90641/EXTODA (Stratford), 12/00336/LTGOUT (Strand East), 11/90621/OUTODA (Pudding Mill).

⁶⁹ LLDC Creative and Cultural Opportunities Assessment (March 2018) – Part of the wider LLDC Combined Economic Study

- 11.63 The commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of how they spend their discretionary leisure spending. There will also be a continued increased in at-home activities due to the advance in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future is to attract customers away from their homes.
- 11.64 Our review of the commercial leisure sector and offer across LLDC area indicates there is a good provision of leisure facilities.
- 11.65 In terms of cinema provision, the assessment found a high retention level from within the LLDC area. The quantitative assessment identified no additional capacity. Where market demand from cinema operators does exist, this should be directed to town centres first in accordance with national and local plan objectives.
- 11.66 The total available expenditure for food and drink is set to increase by +366.2% (£106.3m) over the period to 2036. Whilst no capacity has been identified due to the range of committed floorspace, the prospect for new facilities is however ultimately dependent upon by the level of market demand and interest as well as the overall draw and development of facilities in the broader LLDC area.
- 11.67 There is also a strong provision of health and fitness facilities. Based on the projected population growth and current level of participation the there is potential to support up to 10 commercial gyms or 8 budget gyms over the forecast period to 2036.
- 11.68 It is acknowledged that the LLDC area benefits from an extensive range and quality of cultural as well as family venues and activities.
- 11.69 The combination of the commercial and cultural elements within the LLDC area will contribute significantly to the visitor economy of the area. These need to be maintained and promoted in order to attract further visitors to the area and to help attract all-year trips.
- 11.70 In terms of hotel provision, the LLDC area is well served by a range of national and independent operators. Future provision could provide an opportunity to drive custom for a cultural offer and can act as an identifier and anchor for the area.

12. FUTURE STRATEGY

12.1 This final section summarises the key findings of the quantitative and qualitative need for new retail and leisure floorspace and uses in the LLDC area. It sets out high level advice on how the LLDC can effectively plan for, manage and promote the vitality and viability of its current and emerging centres over the plan period to 2036.

12.2 The need assessment draws on a robust and up-to-date evidence base, including:

- (i) a health check of Stratford (Metropolitan Centre), East Village (Local Centre), Bromley-by-Bow (future District Centre); Hackney Wick (future Neighbourhood Centre) and Pudding Mill (future Local Centre); and
- (ii) analysis of three household telephone interview surveys to help establish current shopping patterns and market shares.

12.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the National Planning Policy Framework (NPPF) and the Planning Practice Guidance (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out-of-centre locations.

12.4 Based on the capacity forecasts, the following provides a brief summary of:

- each of the main centres' relative health, role and function;
- the forecast quantitative and qualitative need for new convenience goods and comparison goods retail floorspace; and
- a reasonable and robust impact 'threshold' in accordance with the NPPF and PPG that will allow the LLDC to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre.

12.5 Since the LLDC's previous assessment town centres and town centre retailing face a myriad of challenges. Centres will need to embrace the new dynamic and build in resilience to adapt seamlessly to future changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres. The retail sector is being driven by the polarisation of retailers towards a smaller number of prime locations, primarily in response to the continued growth of online shopping and changing consumer habits and expectations. It will become increasingly important for the provision of modern and more flexible retail floorspace, and non-retail attractions such as food and beverage uses to help create an all-round experience for consumers. The growth in online shopping, the long-term attraction of larger format and cheaper retail space in out of centre locations, and increasingly fragile retailer, investor and business confidence in the post Brexit world, has created a perfect storm that is bearing down on town centres. The challenge for the LLDC is to manage and promote the future of current and emerging centres when retail is no longer the key driver of their vitality and viability.

Centre Overview

Stratford Metropolitan Centre

12.6 Stratford as a whole is vital and viable centre with a diverse range of provision. The centre is currently designated as a Metropolitan Centre with the potential future designation as an International Centre. Within the LLDC area it represents the principal centre and highest order comparison goods shopping destination, supported by an extensive range of non-retail facilities. The centre continues to evolve with increasing critical mass in terms of retail and leisure provision together with a developing cultural and education sector. It is a key growth node in the east of London and considered healthy at present.

12.7 An 'International Centre' under the London Plan is defined as:

'London's globally-renowned retail and leisure destinations, providing a broad range of high-order comparison and specialist shopping, integrated into environments of the highest architectural quality and interspersed with internationally-recognised leisure, culture, heritage and tourism destinations. These centres have excellent levels of public transport accessibility.'

12.8 Stratford Metropolitan centre's potential elevation to an International Centre is a recognition of the collection of provision and range of uses that meet with this criteria. The centre combines a high order and specialist comparison goods provision at Westfield Stratford City together with the broad range of leisure provision within the QEOP. This is set to be enhanced with the Cultural and Education District. UCL East will be the site of a new university campus for University College London, while Stratford Waterfront features a new campus for the University of the Arts London, along with major new spaces for the Victoria and Albert Museum and Sadler's Wells. The development of this type is likely to enhance the visitor and tourism profile and potential international standing of the centre. The Stratford Waterfront proposal sits outside the current Metropolitan Centre boundary, but given the scale of town centre uses proposed, the LLDC should give consideration to future amendments to the boundary to incorporate these sites.

12.9 The key challenge for the centre is to maintain the momentum of development and growth in a holistic manner and to ensure the complementarity with existing provision within both the traditional and new parts of the centre.

Other Centres (Current & Emerging)

12.10 **Bromley-by-Bow** is designated as a potential future District Centre. Current retail and leisure provision is limited and whilst the centre is highly accessible it remains poorly linked to existing residential areas. This notwithstanding, the broader Masterplan vision is to regenerate and expand town centre uses as well as the addition of a new primary school, community facilities and public open spaces. For a functioning District centre, there will be a requirement for an active retail area that provides for all the basic needs of its immediate residents, as well as other services, community facilities and is set within a high quality public realm. The centre should draw from and serve the catchment of Bromley-by-Bow and its environs. Based on the planned residential development it is likely that the majority of the associated commercial development will be convenience led.

12.11 **Hackney Wick** is designated as a future Neighbourhood Centre. The centre at present has a unique and specialist leisure and creative sector offer with a degree of specialism in the culture and night time economy (as detailed in the Culture and Creative Assessment) and this is identified as a key attractor within the Economy and Employment Land Review, and relationships between sectors within the Business Survey. The centre benefits from its proximity to the Here East technology, media and enterprise hub and as acknowledged throughout the Combined Economy Study it has the ability to capitalise on this in the future through linkages between businesses and to create a unique neighbourhood centre. In the broader context, the centre and its surroundings will substantially benefit from the growth associated with residential development and the associated commercial floorspace proposed. This will aid in elevating the range of uses at the centre albeit it is essential that it meets with the needs of its residents. Over the long term, and to maintain the unique nature of the centre and associated vitality and viability, new commercial provision will also need to reflect the developing role of businesses within the area.

12.12 **East Village** is a designated new Local Centre defined by a residential neighbourhood supporting viable commercial uses. The latter also serves to illustrate the importance of an active retail area. The centre currently provides a food and drink and convenience focus, with strong independent retailer representation. Consideration should be given to the designation of primary and secondary frontages in this location given how the centre has emerged since the 2014 RLS. As a Local Centre, future uses within its boundary should support this local function and should draw from and serve the immediate neighbourhood and vicinity.

12.13 **Pudding Mill** is designated as a future Local Centre. There is currently limited provision of town centre uses. Future development and development as a local centre is predicated on the successful development of residential development and associated viable commercial provision. As a Local Centre, future uses within its boundary should support its local function and should draw from and serve the immediate neighbourhood and vicinity.

Retail Needs Assessment

12.14 Section 10 assessed the overall need for new (convenience and comparison goods) retail floorspace over the period to 2036. The retail capacity assessment is informed by CJ's CREAT^e Capacity Model. The retail capacity assessment is underpinned by robust evidence and forecasts; it assumes that the retail market is in 'equilibrium' at the base year (2018) and that market shares remain constant over the study period.

12.15 For convenience goods there is no forecast between 2018 and 2021 after taking account of all known commitments. Over the medium term to 2026, capacity emerges of between 762 sqm net and 1,220 sqm net rising to between 2,293 sqm net and 3,669 sqm net by 2031. By 2036 capacity emerges of between 3,570 sqm net and 5,712 sqm net.

12.16 In relation to comparison goods, there is also no identified floorspace capacity between 2018 and 2021 after allowing for all known commitments. Capacity emerges by 2026 of 20,048 sqm net; 50,180 sqm net by 2031 and 79,852 sqm net by 2036.

12.17 However, it should be noted that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. The LLDC should also take into account these margins for error when assessing the need for new retail floorspace.

12.18 It is the case that the capacity forecasts are predicated on the current level of market share which may change over time based on the growth in population and commercial provision in the LLDC area. The critical mass of development in terms of the scale and quality of new retail and leisure uses is likely to have a positive impact on the market share from within the study area. In this way, we recommend that the LLDC undertakes a bespoke household survey based on a defined study area every two years to enable the re-evaluation of market shares of both established and emerging centres.

Leisure Needs / Gap Assessment

12.19 Section 11 of the study assesses the need for new commercial leisure uses and the 'gaps' in provision. It shows there is a good provision of cinema screens, food and beverage provision, and health and fitness facilities. The key findings are:

- high retention level of cinema visitation from within the LLDC area with no identified cinema screen capacity;
- available expenditure for food and drink is set to increase in the LLDC area by £106.3m over the period to 2036 with no identified need for additional A3-A5 floorspace based on current commitments, however this is likely to develop further in terms of critical mass as the Metropolitan Centre evolves to become a recognisable international location;
- based on the projected population growth and current level of participation there is potential to support up to 10 commercial gyms or 8 budget gyms over the forecast period to 2036; and
- the range of venues and facilities of cultural interest are numerous and varied across the LLDC area and this contributes significantly locally and to the broad visitor economy and profile of the area.

12.20 In terms of future provisioning for additional cinema and A3-A5 uses, whilst no quantitative needs exist, where there is market demand from operators this should be directed to the existing or emerging town centres first in accordance with national and local plan objectives.

12.21 Leisure uses within the LLDC area will be a key attractor especially in relation to Stratford Metropolitan Centre and its future tourism and culture provision. In relation to existing and new residents in the LLDC area, the key will be to attract them away from their homes. In this way it is important that in addition to retail provision there is an adequate provision of other services and community facilities set in a high quality public realm.

Local Impact Threshold Recommendations

12.22 It has also been assessed whether there is a requirement for the LLDC to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan. In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

- 12.23 The quantitative and qualitative research evidence indicates that whilst the Metropolitan Centre is presently performing relatively well it is nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping.
- 12.24 In terms of assessing significant impacts it is therefore reasonable for applicants proposing developments for new A1 retail (comparison and convenience goods) floorspace and A3-A5 uses of 2,500 sqm gross (and above) outside of the Metropolitan Centre and 200 sqm gross (and above) outside for the District, Local and Neighbourhood Centres to demonstrate that they will not, either on their own or cumulatively with other commitments, result in a “significant adverse impact” on any defined centres within the LLDC area; carried out in accordance with the NPPF and PPG.
- 12.25 This is judged to be a reasonable impact threshold as it will provide LLDC with sufficient flexibility to assess the merits and implications of edge and out-of-centre applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. It is advised that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions. In this way, it reinforces the LLDC’s Policy B.2 on the protection of each centre requiring a retail and leisure impacts assessment where a main town centre use is proposed of more than 2,500 sqm outside the Metropolitan Centre and 200 sqm outside other Centres.
- 12.26 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the LLDC at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the LLDC and applicant on a case-by-case basis. In all cases the LLDC should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications.

Strategic Summary

- 12.27 The LLDC area represents a unique opportunity to develop a new strategic location of focus for east London. In this way the future of the current Metropolitan Centre supported by a network of existing and emerging District, Local and Neighbourhood centres needs to be proactively supported as follows:

LLDC Area

- Stratford Metropolitan centre will remain at the apex of the hierarchy and the main point of investment focus and therefore it can be assumed that up to 80% of the forecast comparison goods capacity will be located here.
- In terms of provisioning for other centres existing or emerging, these centres are likely to accommodate up to 20% of the identified comparison goods capacity.
- The identified proportions on capacity are indicative only and will vary based on the pattern of, and priorities for, development. Identified capacity should be targeted in newly emerging residential growth centres where they will form part of an active retail area that can serve the needs of its residents. In this way, the majority of the convenience goods capacity (80%) is likely to be located in emerging centres with the remainder 20% forming part of ancillary development across the Metropolitan centre or extensions to existing provision.
- Retail and leisure investment within the LLDC area should be supported to encourage development of modern retail and leisure facilities.
- The growth, evolution and regeneration of centres will be predicated on a high quality public realm, accessibility and linkages and it is essential that this is actively promoted when assessing proposals.
- New edge and out-of-centre development for A1 retail (comparison and convenience goods) floorspace and A3-A5 uses should be assessed against a threshold of 2,500 sqm gross for the Metropolitan Centre and 200 sqm gross for the District, Local and Neighbourhood Centres to demonstrate that they will not,

either on their own or cumulatively with other commitments, result in a “significant adverse impact” on any defined centres within the LLDC area.

Stratford Metropolitan Centre

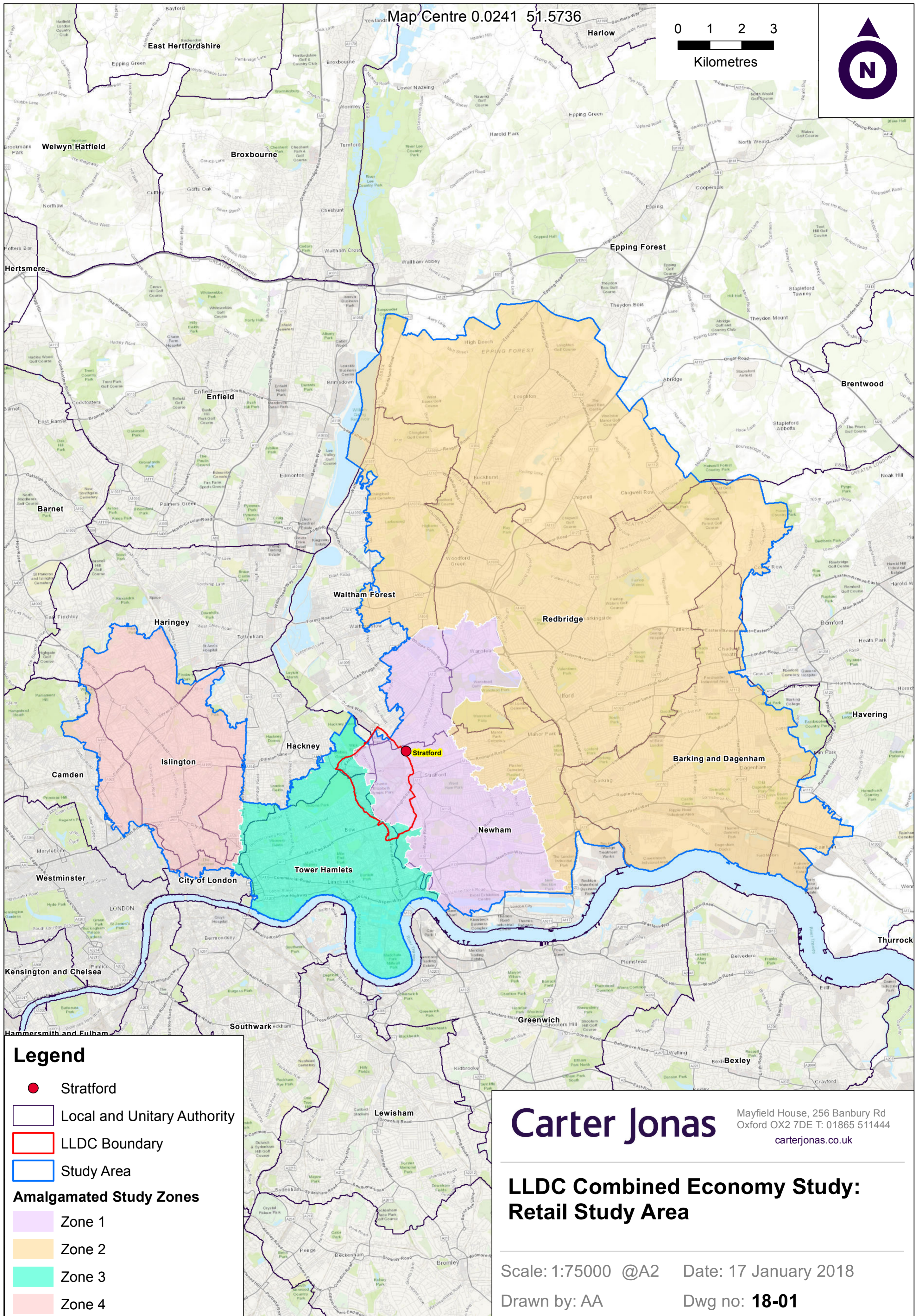
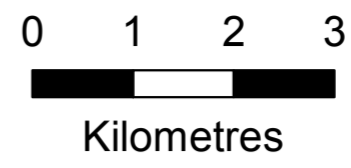
- Stratford Metropolitan centre will be the main focus for large scale retail and leisure development within the LLDC area to develop the critical mass further and to build on the cultural and tourism potential of the centre.
- Up to 80% of the forecast comparison goods capacity is likely to be located here.
- Complementarity between the two parts of Stratford should be proactively managed through enhancements to the public realm across the centre and encouraging linkages.
- The progress to designation as an International Centre is dependent on capitalising on existing and emerging assets such as the specialist high end provision at Westfield Stratford City which is set for further expansion; the development of an internationally recognised leisure and cultural offering within the QEOP and satellite centres (current & emerging); the growth of a cultural and education district and building on the centre's good transport links. Also vital in this mix is the opportunity for development to be integrated, linked and set in a high quality public realm. Together, these elements will constitute the critical mass needed to be recognisable as a truly international location.

District, Local & Neighbourhood Centre (Current & Emerging)




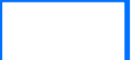



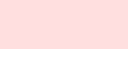
- Retail and commercial leisure development in District, Local and Neighbourhood of an appropriate scale should be supported.
- For the emerging centres at Bromley-by-Bow (future District Centre), Hackney Wick (future Neighbourhood Centre), Pudding Mill (future Local Centre) it is important that the momentum of investment and development is maintained especially in a challenging investment market and to avoid stagnation in developing these centres. Being primarily residential led, the focus on the commercial is likely to be on convenience goods provision.
- In terms of provisioning for other centres existing or emerging, these centres collectively are likely to accommodate up to 20% of the identified comparison goods capacity and up to 80% of the convenience goods capacity.
- Development at **Bromley-by-Bow** (future District Centre) should focus on its location, accessibility and potential for developing its residential development and catchment in a high quality public realm. The commercial provision will be primarily convenience led with potential for up to 5%-10% of the identified comparison goods capacity.
- **East Village** Local Centre continues to evolve. The existing residential community is supporting the viability of the commercial provision. Future commercial provision should build on the established high quality public realm. Whilst this provision is likely to be convenience or leisure led, up to 5% of the identified comparison goods capacity could be located here.
- The development at **Pudding Mill** (future Local Centre) will be residential led and the supporting commercial provision will provide the daily needs of these new residents. Being primarily residential led, the focus on the commercial provision is likely to be on convenience goods. Up to 5% of the identified comparison goods capacity could be located here.
- **Hackney Wick** (future Neighbourhood Centre) commercial development should be complementary to the existing offer and the wider residential provision planned. The uniqueness of the independent leisure offer needs to be managed and maintained. There is also the potential for additional comprehensive linkages with the technology and employment hub at Here East and building further on the character of the adjacent canal setting. Up to 5% of the identified comparison goods capacity could be located here.

APPENDIX 1: STUDY AREA

Map Centre 0.0241 51.5736



Legend

-  Stratford
-  Local and Unitary Authority
-  LLDC Boundary
-  Study Area
- Amalgamated Study Zones**
-  Zone 1
-  Zone 2
-  Zone 3
-  Zone 4

Carter Jonas

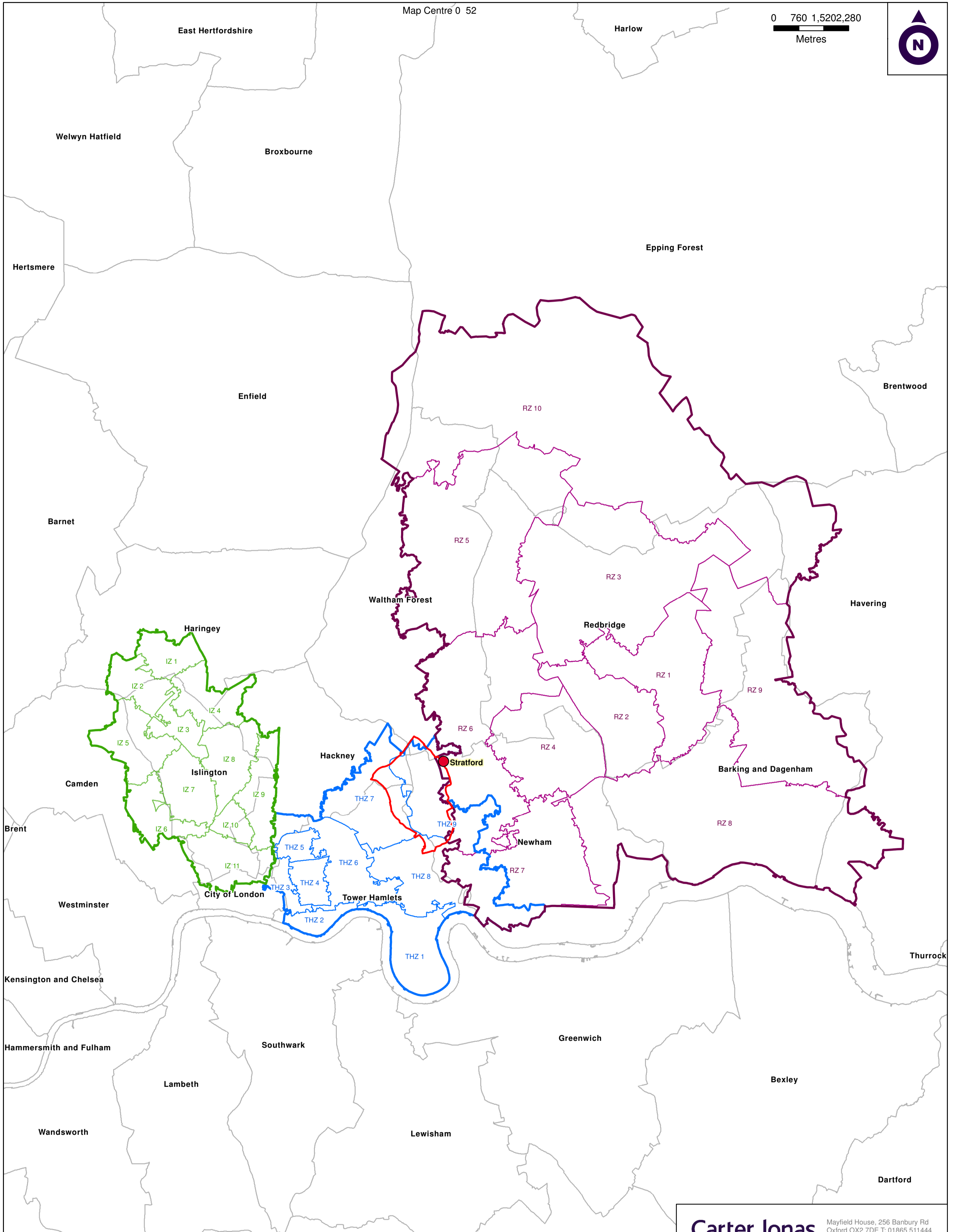
Mayfield House, 256 Banbury Rd
Oxford OX2 7DE T: 01865 511444
carterjonas.co.uk

**LLDC Combined Economy Study:
Retail Study Area**

Scale: 1:75000 @A2 Date: 17 January 2018

Drawn by: AA Dwg no: **18-01**

APPENDIX 2: STUDY AREA – EXTANT RETAIL STUDIES



Legend

- Stratford
- LLDC Boundary
- London Borough of Islington Retail & Leisure Study 2017
- London Borough of Redbridge: Retail Capacity Assessment 2015
- London Borough of Tower Hamlets: Town Centre Retail Capacity Study 2016

Carter Jonas Mayfield House, 256 Banbury Rd
Oxford OX2 7DE T: 01865 511444
carterjonas.co.uk

Client: **London Legacy Devpt. Corp. (LLDC)**
 Project: **LLDC Combined Economy Study**

Title: **Retail Study Area Definition**

Scale: 1:75000 @A2 Date: 25 January 2018
 Drawn by: AA Dwg no: **18-01**

APPENDIX 3: STRATFORD REQUIREMENTS LIST

No.	Use Class	Category	Operator	Sqm
1	A1	Adult Gaming	Admiral Slots	280
2		Alternative Remedies	Revital	100
3		Barbers	Hotshots	65
4		Beauty Salon	Beauty4You	90
5		Bed retailer	Bensons for Beds	695
6		Bike Shop	Cycle Republic	555
7		Budget Retailer	Poundworld	1,860
8		Charity	Crisis	200
9		Charity	British Heart Foundation	740
10		Charity	Sue Ryder	740
11		Cosmetic treatments	Skin+laser	80
12		E-Cigarette Retailer	Cigara	75
13		Electronic Cigarettes	Vaporized	165
14		Escape Room	Fox in a Box	650
15		Fashion Shoe Retailer	Supergal	75
16		Food retail	Lidl	2,780
17		Footwear Retailer	Jones Bootmaker	110
18		Handbags and Accessorises	Bags Etc.	160
19		Kitchens	Magnet	930
20		Optician	European Optical Chain	80
21		Perfume Shop	The Fragrance Shop	140
22		Sweet Shop	Papabubble	650
23		Tile and Wood Flooring Specialist	Topps Tiles	740
24		Tile, bathroom Products	Al Murad Tiles	740
25		Tools and Building Supplies	Toolstation	460
26		Women's Fashion	Little Mistress	185
27	A2	Financial Service Company	Fast Credit	140
28	A3	Baked Doughnuts	Dum Dums	55
29		Café	Filli Café	140
30		Coffee Chain	SOHO Coffee Co	185
31		Cookies	Ben's Cookies	40
32		Fast Food	Roosters Piri Piri	230
33		Fast Food	GDK	140
34		Fast Food Chain	Jollibee	400
35		Gelato	Gino's Gelato	140
36		Hostel and Bar	Les Piaules	2,780
37	B2	Autocentre group	Formula One Autocentre	140
38		Vehicle Maintenance	National Tyres and Autocare	460
39	D2	Children's Gym	My Gym	370
40		Gym	Kiss Gyms	1,860
41		Gym	Snap Fitness	930
42		Gym	NRG Gyms	2,320

APPENDIX 4: EXTANT RETAIL AND LEISURE COMMITMENTS

Stratford Commitments

Location	Planning App Ref	Proposal Details	Address	Decision	Floorspace	GEA/GIA	Date	
Retail & Leisure Commitments								
Stratford City Permission								
Stratford	In-Centre	10/90641/EXTODA	Variation of conditions of Planning Permission (Ref: 07/90023/VARODA) to allow an additional 10 years to submit reserved matters and implement Westfield Stratford City Development. Application to vary conditions B6 and B7 of the Stratford City Outline Planning Permission 07/90023/VARODA to allow an additional 10 years to submit reserved matters and implement the development in Zone 1 (Class B1 only) and Zones 2-7 (all uses). Stratford City Development comprises the comprehensive mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link.	Stratford City Site - Stratford Rail Lands, E15 Including Land Bounded By A River Lea, Channelsea River, Eastway Cycle Circuit, Clays Lane, Temple Mill Lane, Land To The Rear Of Henrietta Street And Thornton Grove, Lee Valley	Approved	11,199 sqm	5,599.5 sqm A1 and (1,399.9 sqm each for the following uses: A2; A3; A4; A5)	Decision made 30-Mar-2012
REMAINING FLOORSPACE BY ZONE								
ZONE 1 (Stratford City)	In-Centre	15/00358/OUT	Residential floorspace (up to 105,000 sq.m GEA and commercial floorspace of up to 3,300 sq.m GEA; and full planning application for 10,902 sq.m (GEA) Class A1 retail anchor store as an extension to Westfield Stratford City (of which 1,814 sqm GEA is existing).	Cherry Park, Stratford City Zone 1, E20 1EJ	Resolution to grant, subject to s.106.	10,902 A1 anchor retail store (1,814 existing)	8,910 sqm	Validated 03-Aug-2015
ZONE 2			International Quarter: 2,438 sqm gross at Stratford Metropolitan Centre (including 1,495 sqm gross currently under construction). For the purposes of the assessment it has been assumed that the floorspace will be split equally between the permitted use classes (A1, A3 and A4) i.e. 813 sqm gross each.				813 sqm each for A1/ A3/ A4	
ZONE 3			Hotel development under construction at N17 including supporting ancillary retail of 2,481 sqm gross (for A3/A4 uses).				2,481 sqm gross (for A3/A4 uses).	
ZONES(S) 3, 4 & 5:			6,280 sqm remaining retail floorspace (split equally in to A1/A2/A3/A4 uses)				1,570 sqm gross each for A1/A2/A3/A4 uses	

Other Stratford							
In-Centre	17/00032/FUL	Extension to Westfield Stratford City (Phase 2) via the Removal of Level 10, Change of Use from Car Parking to Retail (Use Classes A1-A4 14,532sq.m GIA, plus Ancillary and Back of House space 9,429sq.m GIA) and Levels Change at Level 08; re-provision of Car Parking at new Level 04 following Excavation (20,238sq.m GIA); Insertion of Two Escalator Structures on Level 14 (The Street), and; Associated Internal/Below Grade Works to facilitate Vehicle, Pedestrian and Services Connectivity (including Plant at Levels 30 and 40).	Westfield Stratford City, Montfichet Road, Queen Elizabeth Olympic Park, Stratford, E20 1EJ	Resolution to grant, subject to s.106.	Predominately 'higher order' A1 comparison goods retail, together with associated A2/A3/A4 floorspace	14,532 sqm	Validated 15-Feb-2017
Legacy Communities Scheme							
Legacy Communities scheme covering 7 PDZs	Note: Part Inside and Part Outside Centre 11/90621/OUTODA	Development comprises up to 641,817 sqm of residential (C3) uses, including up to 4,000 sqm of Sheltered Accommodation (C3); up to 14,500sqm of hotel (C1) accommodation; up to 30,369 sqm (B1a) and up to 15,770 sqm (B1b/B1c) business and employment uses; up to 25,987 sqm (A1-A5) shopping, food and drink and financial and professional services; up to 3,606 sqm (D2) leisure space and up to 31,451sqm (D1) community, health, cultural, assembly and education facilities, including two primary schools and one secondary school; new streets and other means of access and circulation	Land Within The Olympic Park And Land At Pudding Mill Lane, Land At Bridgewater Road And Land At Rick Roberts Way	Approved	25,987 sqm (A1-A5) which includes 13,500 sqm A1/2 retail development and 17,100 sqm A3/4/5 retail development. 3,606 sqm D2 leisure floorspace is also proposed	13,940 sqm (2,788 sqm each for the following uses: A1; A2; A3; A4; A5)	Decision made 28-Sep-2012

Pudding Mill Commitments

Location	Planning App Ref	Full Proposal	Address	Decision	Floorspace	GEA/GIA	Date
----------	------------------	---------------	---------	----------	------------	---------	------

Retail & Leisure Commitments

Pudding Mill							
Pudding Mill	15/00392/FUL	Mixed use redevelopment for 194 residential units, 2,136sqm of commercial floorspace (A1-A3 / B1 / D1 / D2).	Land at Cooks Road, Pudding Mill Lane, Stratford, London, E15 2PW	Approved	2,136sqm of commercial floorspace (A2-A3 / B1 / D1 / D2).	300sqm (A2); 500sqm (A4); 8,170sqm (B1a); 1,310 sqm B1 flexible; 1,310 sqm (D1)	Decision made 12-Aug-2016

Bromley-by-Bow Commitments

Location	Planning App Ref	Proposal Details	Address	Decision	Floorspace	GEA/GIA	Date
Retail & Leisure Commitments							
Bromley-by-Bow							
Bromley-by-Bow	In-centre 17/00344/FUL	Development of a mixed-use scheme for 407 residential units, 339 sqm of employment space and 274 sqm of flexible retail space	Land at Imperial Street, Bromley by Bow, London, E3 3ED	Resolution to grant, subject to s.106.	274 sqm flexible retail space	274 sqm of which 91.3 sqm (A1); 91.3sqm (A2) and 91.3sqm (A3)	Subject to s.106 sign-off
Bromley-by-Bow	In-centre 17/00364/FUL	Full planning application for the demolition of the existing buildings on site and the construction of a residential-led mixed use scheme comprising a series of buildings ranging from one to 27 storeys in height to provide 3,570 sqm of flexible community, commercial and retail floorspace (Use Classes A1, A2, A3, A4, B1 and/or D1) at ground and mezzanine floor level, 491 residential units (Use Class C3) on the upper floors, parking/refuse/servicing at basement and ground floor, energy centre, communal amenity areas, and all associated landscaped public open space.	Land at Clockhouse and Access House, Imperial Street, Bromley-by-Bow, London, E3 3AE	Resolution to grant, subject to s.106.	712 sqm flexible space	712 sqm of which 178sqm (A1); 178sqm (A2), 178sqm (A3) and 178sqm (A4).	Subject to s.106 sign-off

Strand East Commitments

Location	Planning App Ref	Full Proposal	Address	Decision	Floorspace	GEA/GIA	Date	
Retail & Leisure Commitments								
Strand East								
Strand East	Out of centre	12/00336/LTGOUT	All matters reserved except access; demolition of buildings where stated; 1192 residential units (C3) of which 10% of properties wheelchair accessible; 12,593sqm flexible uses including retail (A1), financial and professional services (A2), restaurants, cafes and bars (A3/4), offices and workshops (B1), non-residential institution (D1) and assembly and leisure (D2); 33,950sqm offices and works shops (B1); 350 bed hotel (C1); pedestrian bridge across Three Mills River; a riverside park; car, motorcycle and bicycle parking; servicing and ancillary works.	Development Site Sugar House Lane Peninsula Sugar House Lane Stratford London	Approved	1,600 sqm A1 and 2,000 sqm A3/A4	1,600 sqm A1 and 2,000 sqm A3/A4	Decision made 28-Feb-2012
Related Reserve Matters Application								
Strand East	Out of centre	15/00250/REM	Application for the Approval of Reserved Matters for the construction of 4 buildings comprising approximately 27,000m ² of office (B1), retail (A1/A2), restaurant/bar (A3/A4) and community floorspace (D1)	Land to the south east of High Street Stratford, west of Sugar House Lane and east of Hunts Lane, Stratford, E15 2QS	Approved	597sqm A1; 181 sqm A2; 214sqm A3; 214sqm A5; 25,566 sqm B1 (flex); 247 sqm (D1)	597sqm A1; 181 sqm A2; 214sqm A3; 214sqm A5	Decision made 16-Dec-2015
Strand East	Out of centre	15/00481/REM	Construction of one urban block comprising two hotels with a total of 349 beds (Use Class C1), 21 residential units (Use Class C3), approx. 4,160 sqm of commercial floorspace (Use Classes A1, A2, A3, A4, B1)	Land to the south of High Street Stratford, west of Hunts Lane and east of the River Lea Navigation, Stratford, E15	Pending	Approx. 1,070 sqm of Flexible Uses Floorspace (A1, A2, A3, A4 and B1) including allowance for 514 sq.m for A2 on ground floor at high street Stratford;	1070sqm flex A1-A4 and B1	Decision made 25-Sep-2015
Strand East	Out of centre	15/00359/REM	Application for the Approval of Reserved Matters for the construction of two buildings comprising 42 residential units and 391m ² of non-residential floorspace (falling within Use Classes A1 (retail), A3 (restaurants and cafes) and A4 (drinking establishments)) a	Land to the south of High Street Stratford, west of Hunts Lane and east of the River Lea Navigation, Stratford, E15	Approved	391sqm A1/A3/A4 so approx 130sqm A1	196sqm A1; 196sqm A3;	Permitted 14/12/2016
Strand East	Out of centre	16/00223/REM	Application for the Approval of Reserved Matters for the construction of two blocks comprising 161 residential units, approximately 628m ² (GIA) of Use Class A1 (Retail), A2 (Financial and Professional Services) and/or B1 (Business)	Land to the south of High Street Stratford, east of Sugar House Lane and north and west of Three Mills Wall River, Stratford, E15	Approved	209sqm A1; 209 sqm A2; 209 sqm B1	209sqm A1; 209 sqm A2; 209 sqm B1	Decision made 19-Aug-2016
Strand East	Out of centre	16/00440/REM	Application for the Approval of Reserved Matters for the construction of two urban blocks and central mews comprising 211 residential units (Use Class C3), approx. 70 sqm of commercial floorspace (Use Classes A1, A2, B1)	Land to the south of High Street Stratford, east of Sugar House Lane and north and west of Three Mills Wall River, Stratford, E15	Approved	70 sq.m flexible uses (A1, A2, A3/4, A5)	12sqm (A1); 12sqm (A2); 6sqm (A3); 6 sqm (A4); 6sqm (A5); 12 sqm (B1 flex); 12 sqm (D1)	Decision made 16-May-2017
Strand East	Out of centre	17/00348/REM	Construction of 89 residential units and approximately 651m ² of non-residential floorspace (A1 (retail), A3 (restaurants and cafes) and A4 (drinking establishments)).	Land to the south of High Street Stratford, east of Sugar House Lane and north and west of Three Mills Wall River, Stratford, E15	Pending	80 sq.m flexible uses (A1, A2, A3/4, A5)	20sqm (A1); 20sqm (A2); 10sqm (A3); 10 sqm (A4); 20 sqm (B1 flex);	Validated 07-Aug-2017
Strand East	Out of centre	15/00327/REM	Application for the Approval of Reserved Matters for the construction of a perimeter block comprising 89 residential units and approximately 651m ² of non-residential floorspace (falling within Use Classes A1 (retail), A3 (restaurants and cafes) and A4 (drinking establishments)) and the provision of hard	Land to the south of High Street Stratford, east of Sugar House Lane and north and west of Three Mills Wall River, Stratford, E16	Approved	651 flexible A1, A3, A4	110sqm (A1); 110sqm (A2); 55sqm (A3); 55 sqm (A4); 6sqm (A5); 110 sqm (B1 flex); 110 sqm (D1)	Validated 16/05/2017
Strand East	Out of centre	17/00369/REM	Application for the Approval of Reserved Matters for the construction of two blocks comprising 82 residential units and approximately 330m ² of non-residential floorspace (falling within Use Classes A1 (retail), A3 (restaurants and cafes), A4 (drinking establishments) and/or B1 (office)) a.	Land to the south of High Street Stratford, east of Sugar House Lane and north and west of Three Mills Wall River, Stratford, E17	Pending	330 flexible A1, A3, A4, Not known		Validated 17-Aug-2017

Hackney Wick Commitments

Location	Planning App Ref	Proposal Details	Address	Decision	Floorspace	GEA/GIA	Date
Retail & Leisure Commitments							
Hackney Wick							
Hackney Wick	In-centre 16/00166/OUT	Outline planning application for 28,281sqm GIA of existing buildings on site and development of a phased comprehensive mixed use development of up to 119,242sqm GIA. Residential (Use Class C3) of up to 78,931sqm to deliver approx. 874 units; Employment (B1a / B1c) of a minimum of 29,908sqm; Retail (A1-A4) of up to 4,493sqm; and Community Facilities (D1/D2) for a minimum of 381sqm and up to 2,318sqm; with up to 3,593sqm of on plot undercroft or basement car parking, together with a minimum of 23,359sqm public realm, playspace, open space and associated vehicle access.	Site known as 'Hackney Wick Central'	Pending	Up to 4,493sqm for retail space (A1-A4)	3,875 sqm (968.75 sqm net each for the following uses: A1; A2; A3; A4)	Validated 10-May-2016
Other permissions covering some of the same plots							
Hackney Wick	In-centre 15/00338/FUL	Mixed use redevelopment to provide 2,951 sq.m (GIA) of commercial space (B1, with up to 700sq.m A1 and D1 use) with yard area, 44 residential dwellings (4 X studio units, 15 x 1 bed, 15 x 2 bed and 10 x 3 bed), upper level amenity areas, cycle parking and refuse/recycling stores.	75-89 Wallis Road and 59 Berkshire Road, Hackney Wick, London, E9 5LN	Approved	Up to 700 sq.m of A1 and D1 use	350 sqm (A1)	Decision made 16-Aug-2017
Hackney Wick	In-centre 16/00003/FUL	Application for the change of use from Class B8 Storage and Distribution to a mix of uses including bar/ microbrewery (use Class A4) at ground floor level and office floorspace (use Class B1) at first, second and third floors.	99 Wallis Road, Hackney, London, E9 5LN	Approved	749 sqm	388 sqm (A4)	Decision made 05-Jan-2017
Hackney Wick	In-centre 14/00387/FUL	Proposed demolition of all existing buildings at the site (other than the north eastern corner building at no. 88 Wallis Road) and redevelopment with a mixed use development composed of 5,365sqm (GEA) of flexible commercial floorspace (Use Class B1/A1/A2/A3/D1) and 120 residential units (Use Class C3) as well as new areas of public realm, landscaped amenity space and car/cycle parking (the retained corner building at no. 88 Wallis Road is to be converted/extended)	80-84 & 88, Wallis Road, Hackney, LONDON, E9 5LW	Approved	804 sqm	804 sqm flexible (268 sqm each for the following uses: A1; A2; A3)	Decision made 30-Jun-2016

APPENDIX 5: POPULATION AND EXPENDITURE: CONVENIENCE GOODS

TABLE 1: BASE YEAR (2018) POPULATION & PROJECTIONS (to 2036) **GROWTH 2018 to 2036:**

ZONE:	2018	2021	2026	2031	2036	%	2018-36
Zone 1	308,284	336,392	381,572	416,952	442,586	43.6%	134,302
Zone 2	754,654	787,833	838,137	883,285	925,544	22.6%	170,890
Zone 3	361,685	382,764	411,669	437,171	460,731	27.4%	99,046
Zone 4	426,550	443,672	466,821	487,822	507,988	19.1%	81,438
Study Area	1,851,173	1,950,661	2,098,199	2,225,230	2,336,849	26.2%	485,676

Source: 2018 Base Year Data Sourced from Experian Business Strategies

Notes: The base year (2018) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2018 (incl SFT)	2018	2021	2026	2031	2036
		EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		3.4%	3.9%	4.6%	5.1%	5.3%
REVISED SPECIAL FORMS OF TRADING (%):		1.5%	1.7%	2.0%	2.2%	2.3%
Zone 1	£1,507	£1,485	£1,482	£1,485	£1,489	£1,495
Zone 2	£1,770	£1,745	£1,741	£1,744	£1,749	£1,756
Zone 3	£1,772	£1,747	£1,743	£1,746	£1,751	£1,758
Zone 4	£2,190	£2,158	£2,153	£2,157	£2,163	£2,172
STUDY AREA AVERAGE:	£1,809.8	£1,783	£1,780	£1,783	£1,788	£1,795

Source: Average spend per capita estimates (2018 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2018) TO 2036 (£m) **GROWTH 2018 to 2036:**

	2018 (incl SFT)	2018	2021	2026	2031	2036	%	2018-36
Zone 1	£464.6	£457.8	£498.4	£566.5	£620.8	£661.6	44.5%	£203.9
Zone 2	£1,336.0	£1,316.5	£1,371.4	£1,461.8	£1,544.9	£1,625.5	23.5%	£309.0
Zone 3	£641.0	£631.7	£667.0	£718.8	£765.5	£810.1	28.2%	£178.4
Zone 4	£934.1	£920.5	£955.3	£1,007.1	£1,055.4	£1,103.6	19.9%	£183.1
STUDY AREA:	£3,375.6	£3,326.5	£3,492.2	£3,754.3	£3,986.6	£4,200.8	26.3%	£874.3

APPENDIX 6: POPULATION AND EXPENDITURE: COMPARISON GOODS

ZONE:	2018	2021	2026	2031	2036	%	2018-36
Zone 1	308,284	336,392	381,572	416,952	442,586	43.6%	134,302
Zone 2	754,654	787,833	838,137	883,285	925,544	22.6%	170,890
Zone 3	361,685	382,764	411,669	437,171	460,731	27.4%	99,046
Zone 4	426,550	443,672	466,821	487,822	507,988	19.1%	81,438
Study Area	1,851,173	1,950,661	2,098,199	2,225,230	2,336,849	26.2%	485,676

Source: 2018 Base Year Data Sourced from Experian Business Strategies

Notes: The base year (2018) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2018 (incl SFT)	2018	2021	2026	2031	2036
		EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		15.4%	16.9%	17.5%	17.8%	18.0%
REVISED SPECIAL FORMS OF TRADING (%):		14.3%	15.7%	16.3%	16.6%	16.7%
Zone 1	£2,252	£1,930	£2,064	£2,400	£2,800	£3,271
Zone 2	£2,857	£2,448	£2,618	£3,045	£3,552	£4,149
Zone 3	£2,862	£2,452	£2,623	£3,050	£3,559	£4,156
Zone 4	£3,598	£3,083	£3,298	£3,835	£4,474	£5,225
STUDY AREA AVERAGE:	£2,892.5	£2,478	£2,651	£3,082	£3,596	£4,200

Source: Average spend per capita estimates (2018 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

	2018 (incl SFT)	2018	2021	2026	2031	2036	%	2018-36
Zone 1	£694.3	£594.9	£694.3	£915.8	£1,167.6	£1,447.5	143.3%	£852.6
Zone 2	£2,156.2	£1,847.3	£2,062.9	£2,551.9	£3,137.7	£3,840.0	107.9%	£1,992.7
Zone 3	£1,035.3	£887.0	£1,004.1	£1,255.7	£1,555.7	£1,915.0	115.9%	£1,028.0
Zone 4	£1,534.8	£1,315.0	£1,463.1	£1,790.1	£2,182.4	£2,654.3	101.8%	£1,339.3
STUDY AREA:	£5,420.6	£4,644.1	£5,224.4	£6,513.6	£8,043.3	£9,856.8	112.2%	£5,212.7

APPENDIX 7: CONVENIENCE GOODS MARKET SHARES

TABLE 1: ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

ALL CONVENIENCE GOODS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	0.7%	0.0%	0.7%	0.0%	0.4%
Marks & Spencer, Westfield, Stratford City	0.7%	0.0%	0.2%	0.0%	0.2%
Waitrose, Westfield Stratford City	0.3%	0.1%	0.0%	0.0%	0.1%
Sainsbury's Superstore, The Mall, Stratford	3.4%	0.1%	10.6%	0.0%	4.9%
Tesco Express, High Street, Stratford	0.7%	0.0%	0.3%	0.0%	0.2%
All Other Stratford Town Centre	1.4%	0.1%	0.1%	0.0%	0.2%
Subtotal	7.2%	0.3%	11.8%	0.0%	6.0%
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	0.5%	0.5%	0.0%	0.0%	0.3%
Tesco Superstore, Hancock Road, Bromley-by-Bow	1.1%	0.0%	4.3%	0.0%	2.0%
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	0.0%	0.0%	0.3%	0.0%	0.1%
Other Bromley-by-Bow	0.2%	0.0%	0.4%	0.0%	0.2%
Subtotal	1.8%	0.5%	5.1%	0.0%	2.6%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	8.7%	0.3%	0.4%	0.0%	1.4%
Tesco Express, Romford Road, Stratford	0.0%	0.1%	0.3%	0.0%	0.1%
Subtotal	8.7%	0.4%	0.7%	0.0%	1.5%
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	1.5%	3.7%	0.0%	0.0%	1.6%
ASDA Merrielands Crescent	0.3%	2.4%	0.0%	0.0%	1.0%
Tesco Extra, High Road, Goodmayes, Romford	0.7%	6.7%	0.0%	0.0%	2.7%
Asda, Tollgate Road, Beckton	4.9%	1.8%	0.0%	0.0%	1.3%
Asda, East Ferry, Isle of Dogs	0.4%	0.0%	9.7%	0.0%	4.2%
Sainsburys Superstore, Cambridge Heath, Whitechapel	0.4%	0.0%	11.7%	0.0%	5.0%
Waitrose, Canada Square, Canary Wharf	0.0%	0.0%	3.6%	0.0%	1.5%
Sainsburys Superstore, Camden Road, Camden	0.0%	0.0%	0.0%	4.2%	0.3%
Sainsburys Superstore, Liverpool Road, Islington	0.0%	0.0%	0.0%	7.7%	0.5%
Waitrose, Holloway Road, Holloway	0.0%	0.0%	0.0%	6.8%	0.4%
All Other Centres / Stores	71.7%	79.8%	52.3%	74.1%	66.8%
Subtotal	79.9%	94.5%	77.3%	92.9%	85.3%
Special Forms of Trading / Internet Shopping	2.4%	4.4%	5.0%	7.1%	4.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: MAIN FOOD - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

MAIN FOOD - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	1.1%	0.0%	0.6%	0.0%	0.4%
Marks & Spencer, Westfield, Stratford City	0.6%	0.0%	0.1%	0.0%	0.1%
Waitrose, Westfield Stratford City	0.5%	0.1%	0.0%	0.0%	0.1%
Sainsbury's Superstore, The Mall, Stratford	2.9%	0.0%	16.2%	0.0%	7.2%
Tesco Express, High Street, Stratford	0.8%	0.0%	0.0%	0.0%	0.1%
All Other Stratford Town Centre	0.8%	0.0%	0.0%	0.0%	0.1%
Subtotal	6.7%	0.1%	16.8%	0.0%	8.0%
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	0.6%	0.4%	0.1%	0.0%	0.3%
Tesco Superstore, Hancock Road, Bromley-by-Bow	1.7%	0.0%	5.3%	0.0%	2.5%
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	0.0%	0.0%	0.0%	0.0%	0.0%
Other Bromley-by-Bow	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	2.2%	0.4%	5.4%	0.0%	2.7%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	10.9%	0.5%	0.7%	0.0%	1.8%
Tesco Express, Romford Road, Stratford	0.0%	0.0%	0.4%	0.0%	0.2%
Subtotal	10.9%	0.5%	1.1%	0.0%	2.0%
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	2.1%	4.8%	0.0%	0.0%	2.1%
ASDA Merriellands Crescent	0.3%	3.3%	0.0%	0.0%	1.3%
Tesco Extra, High Road, Goodmayes, Romford	1.1%	8.7%	0.0%	0.0%	3.5%
Asda, Tollgate Road, Beckton	6.6%	2.8%	0.0%	0.0%	1.9%
Asda, East Ferry, Isle of Dogs	0.6%	0.0%	13.1%	0.0%	5.6%
Sainsburys Superstore, Cambridge Heath, Whitechapel	0.6%	0.0%	16.0%	0.0%	6.9%
Waitrose, Canada Square, Canary Wharf	0.0%	0.0%	4.3%	0.0%	1.8%
Sainsburys Superstore, Camden Road, Camden	0.0%	0.0%	0.0%	5.9%	0.4%
Sainsburys Superstore, Liverpool Road, Islington	0.0%	0.0%	0.0%	10.8%	0.7%
Waitrose, Holloway Road, Holloway	0.0%	0.0%	0.0%	9.4%	0.6%
All Other Centres / Stores	65.2%	72.7%	35.5%	63.8%	55.5%
Subtotal	76.5%	92.3%	69.0%	89.9%	80.3%
Special Forms of Trading / Internet Shopping					
	3.7%	6.7%	7.7%	10.1%	6.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: TOP-UP FOOD - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

TOP-UP FOOD - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	0.0%	0.0%	0.9%	0.0%	0.4%
Marks & Spencer, Westfield, Stratford City	0.9%	0.0%	0.3%	0.0%	0.3%
Waitrose, Westfield Stratford City	0.0%	0.2%	0.0%	0.0%	0.1%
Sainsbury's Superstore, The Mall, Stratford	4.2%	0.2%	0.2%	0.0%	0.7%
Tesco Express, High Street, Stratford	0.5%	0.0%	0.8%	0.0%	0.4%
All Other Stratford Town Centre	2.4%	0.2%	0.2%	0.0%	0.5%
Subtotal	8.1%	0.6%	2.5%	0.0%	2.3%
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	0.5%	0.7%	0.0%	0.0%	0.3%
Tesco Superstore, Hancock Road, Bromley-by-Bow	0.0%	0.0%	2.5%	0.0%	1.0%
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	0.0%	0.0%	1.0%	0.0%	0.4%
Other Bromley-by-Bow	0.5%	0.0%	1.2%	0.0%	0.6%
Subtotal	1.0%	0.7%	4.6%	0.0%	2.3%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	4.7%	0.0%	0.0%	0.0%	0.6%
Tesco Express, Romford Road, Stratford	0.0%	0.2%	0.0%	0.0%	0.1%
Subtotal	4.7%	0.2%	0.0%	0.0%	0.7%
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	0.3%	1.5%	0.0%	0.0%	0.6%
ASDA Merriellands Crescent	0.5%	0.8%	0.0%	0.0%	0.4%
Tesco Extra, High Road, Goodmayes, Romford	0.0%	3.1%	0.0%	0.0%	1.2%
Asda, Tollgate Road, Beckton	1.7%	0.0%	0.0%	0.0%	0.2%
Asda, East Ferry, Isle of Dogs	0.0%	0.0%	3.5%	0.0%	1.5%
Sainsburys Superstore, Cambridge Heath, Whitechapel	0.0%	0.0%	3.8%	0.0%	1.6%
Waitrose, Canada Square, Canary Wharf	0.0%	0.0%	2.2%	0.0%	0.9%
Sainsburys Superstore, Camden Road, Camden	0.0%	0.0%	0.0%	1.1%	0.1%
Sainsburys Superstore, Liverpool Road, Islington	0.0%	0.0%	0.0%	2.1%	0.1%
Waitrose, Holloway Road, Holloway	0.0%	0.0%	0.0%	2.0%	0.1%
All Other Centres / Stores	83.7%	93.1%	83.3%	93.3%	87.8%
Subtotal	86.2%	98.5%	92.8%	98.5%	94.5%
Special Forms of Trading / Internet Shopping					
	0.0%	0.0%	0.1%	1.5%	0.1%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX 8: COMPARISON GOODS MARKET SHARES

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	33.4%	11.1%	22.4%	1.7%	18.0%
Local Centres					
Bromley-by-Bow	0.1%	0.0%	0.6%	0.0%	0.3%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.1%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	2.6%	10.6%	0.4%	0.0%	4.6%
Romford Town Centre	0.6%	8.6%	0.2%	0.0%	3.5%
Central London	2.8%	2.5%	13.3%	21.7%	8.4%
Canary Wharf	0.2%	0.0%	4.8%	1.0%	2.2%
Beckton: Triangle Retail Park	1.2%	0.0%	1.9%	0.0%	1.0%
Beckton: Gallions Reach Shopping Park	1.5%	0.0%	2.8%	0.0%	1.4%
Beckton: Other	2.8%	0.0%	2.0%	0.0%	1.2%
All Other Centres / Stores	41.3%	51.6%	31.2%	45.3%	41.2%
Subtotal	53.1%	73.3%	56.6%	68.1%	63.4%
Special Forms of Trading / Internet Shopping	13.4%	15.7%	20.4%	30.2%	18.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: CLOTHING & FOOTWEAR - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

CLOTHING & FOOTWEAR - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	48.3%	22.0%	41.2%	3.5%	32.5%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.0%	0.0%	0.0%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	4.7%	12.3%	0.6%	0.0%	5.6%
Romford Town Centre	1.3%	12.5%	0.4%	0.1%	5.1%
Central London	3.6%	2.3%	16.8%	34.0%	10.7%
Canary Wharf	0.0%	0.0%	5.7%	0.0%	2.5%
Beckton: Triangle Retail Park	0.9%	0.0%	1.6%	0.0%	0.8%
Beckton: Gallions Reach Shopping Park	0.9%	0.0%	2.7%	0.0%	1.3%
Beckton: Other	1.4%	0.0%	0.3%	0.0%	0.3%
All Other Centres / Stores	27.3%	38.8%	16.1%	33.5%	27.2%
Subtotal	40.1%	66.0%	44.2%	67.6%	53.4%
Special Forms of Trading / Internet Shopping	11.6%	12.0%	14.5%	28.9%	14.1%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: RECORDING MEDIA, BOOKS, STATIONERY & DRAWING MATERIALS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

RECORDING MEDIA, BOOKS, STATIONERY & DRAWING MATERIALS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	27.0%	4.6%	15.7%	0.8%	11.9%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.1%	0.0%	0.1%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.4%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	0.8%	7.2%	0.2%	0.0%	2.7%
Romford Town Centre	0.5%	6.9%	0.0%	0.0%	2.5%
Central London	2.4%	1.9%	7.9%	4.8%	5.0%
Canary Wharf	0.0%	0.0%	6.0%	13.7%	3.8%
Beckton: Triangle Retail Park	0.0%	0.0%	0.5%	0.0%	0.2%
Beckton: Gallions Reach Shopping Park	0.7%	0.0%	0.5%	0.0%	0.3%
Beckton: Other	0.6%	0.0%	0.5%	0.0%	0.3%
All Other Centres / Stores	16.0%	18.4%	19.2%	27.9%	19.2%
Subtotal	21.0%	34.4%	34.9%	46.3%	34.1%
Special Forms of Trading / Internet Shopping					
	51.5%	61.0%	49.2%	52.9%	53.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 4: AUDIO VISUAL, PHOTOGRAPHIC, COMPUTER & ELECTRICAL ITEMS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

AUDIO VISUAL, PHOTOGRAPHIC, COMPUTER & ELECTRICAL ITEMS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	31.4%	11.1%	8.3%	1.7%	10.0%
Local Centres					
Bromley-by-Bow	0.8%	0.0%	0.0%	0.0%	0.1%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	0.6%	4.3%	0.1%	0.0%	0.9%
Romford Town Centre	0.2%	2.7%	0.0%	0.0%	0.5%
Central London	1.6%	2.4%	11.3%	28.4%	10.5%
Canary Wharf	0.0%	0.0%	3.1%	0.0%	2.1%
Beckton: Triangle Retail Park	6.6%	0.0%	1.6%	0.0%	1.6%
Beckton: Gallions Reach Shopping Park	4.2%	0.0%	1.1%	0.0%	1.0%
Beckton: Other	2.2%	0.0%	1.2%	0.0%	0.9%
All Other Centres / Stores	22.6%	48.4%	35.6%	30.7%	36.3%
Subtotal	38.0%	57.8%	53.9%	59.1%	53.8%
Special Forms of Trading / Internet Shopping					
	29.8%	31.1%	37.8%	39.2%	36.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 5: PET PRODUCTS, HOBBY ITEMS, SPORTSWEAR, CAMPING, CYCLING & MUSICAL INSTRUMENTS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

PET PRODUCTS, HOBBY ITEMS, SPORTSWEAR, CAMPING, CYCLING & MUSICAL INSTRUMENTS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	34.3%	4.3%	19.7%	0.6%	13.7%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.7%	0.0%	0.3%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	0.5%	8.8%	0.0%	0.0%	3.8%
Romford Town Centre	0.0%	4.9%	0.8%	0.0%	2.4%
Central London	0.0%	1.0%	5.5%	8.8%	3.2%
Canary Wharf	0.0%	0.0%	3.4%	0.6%	1.4%
Beckton: Triangle Retail Park	0.9%	0.0%	2.6%	0.0%	1.1%
Beckton: Gallions Reach Shopping Park	3.3%	0.0%	2.9%	0.1%	1.5%
Beckton: Other	3.8%	0.0%	3.0%	0.0%	1.6%
All Other Centres / Stores	40.5%	50.0%	27.0%	44.1%	39.3%
Subtotal	49.0%	64.6%	45.1%	53.6%	54.3%
Special Forms of Trading / Internet Shopping	16.7%	31.1%	34.4%	45.8%	31.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 6: FURNITURE, CARPETS, OTHER FLOOR COVERINGS AND HOUSEHOLD TEXTILES - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

FURNITURE, CARPETS, OTHER FLOOR COVERINGS AND HOUSEHOLD TEXTILES - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	16.3%	5.6%	4.6%	1.2%	6.1%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.4%	0.0%	0.2%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	1.9%	5.4%	0.6%	0.0%	2.6%
Romford Town Centre	0.9%	6.1%	0.1%	0.0%	2.6%
Central London	2.6%	2.9%	14.2%	21.2%	8.9%
Canary Wharf	0.5%	0.0%	0.4%	0.0%	0.2%
Beckton: Triangle Retail Park	3.5%	0.0%	6.2%	0.0%	3.1%
Beckton: Gallions Reach Shopping Park	0.5%	0.0%	7.2%	0.0%	3.1%
Beckton: Other	6.0%	0.0%	2.9%	0.0%	1.9%
All Other Centres / Stores	53.1%	67.6%	45.3%	42.6%	54.8%
Subtotal	69.2%	82.1%	77.0%	63.8%	77.2%
Special Forms of Trading / Internet Shopping	14.5%	12.3%	18.0%	35.1%	16.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 7: DIY GOODS, DECORATING SUPPLIES AND GARDEN PRODUCTS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

DIY GOODS, DECORATING SUPPLIES AND GARDEN PRODUCTS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	6.3%	0.9%	1.7%	0.0%	1.7%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.1%	0.0%	0.0%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	0.0%	2.5%	0.3%	0.0%	1.2%
Romford Town Centre	0.0%	2.7%	0.0%	0.0%	1.2%
Central London	0.4%	0.2%	1.7%	2.5%	1.0%
Canary Wharf	0.0%	0.0%	2.2%	0.0%	0.9%
Beckton: Triangle Retail Park	1.3%	0.0%	2.6%	0.0%	1.2%
Beckton: Gallions Reach Shopping Park	0.4%	0.0%	1.1%	0.0%	0.5%
Beckton: Other	14.7%	0.0%	24.5%	0.1%	11.5%
All Other Centres / Stores	73.8%	91.8%	58.8%	85.0%	76.1%
Subtotal	90.6%	97.3%	91.1%	87.6%	93.4%
Special Forms of Trading / Internet Shopping	3.1%	1.9%	7.1%	12.4%	4.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 8: PERSONAL CARE, NON-ELECTRIC APPLIANCES, COSMETICS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

PERSONAL CARE, NON-ELECTRIC APPLIANCES, COSMETICS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	30.2%	6.1%	16.5%	0.1%	13.3%
Local Centres					
Bromley-by-Bow	0.1%	0.0%	2.4%	0.0%	1.0%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.3%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	1.5%	17.0%	0.0%	0.0%	6.6%
Romford Town Centre	0.0%	7.0%	0.0%	0.0%	2.6%
Central London	4.2%	4.9%	14.5%	10.5%	9.4%
Canary Wharf	0.6%	0.0%	6.6%	0.4%	3.0%
Beckton: Triangle Retail Park	0.2%	0.0%	0.4%	0.0%	0.2%
Beckton: Gallions Reach Shopping Park	1.9%	0.0%	2.3%	0.0%	1.2%
Beckton: Other	1.6%	0.0%	0.7%	0.0%	0.5%
All Other Centres / Stores	55.3%	59.8%	48.3%	80.4%	55.4%
Subtotal	65.3%	88.7%	72.7%	91.3%	78.9%
Special Forms of Trading / Internet Shopping	4.2%	5.2%	8.5%	8.6%	6.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 9: ALL OTHER GOODS (JEWELLERY, GLASSWARE, TABLEWARE HOUSEHOLD UTENSILS) - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

ALL OTHER GOODS (JEWELLERY, GLASSWARE, TABLEWARE HOUSEHOLD UTENSILS) - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	26.2%	9.5%	25.5%	1.7%	15.9%
Local Centres					
Bromley-by-Bow	0.0%	0.0%	0.2%	0.0%	0.1%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	3.4%	10.4%	0.4%	0.0%	6.1%
Romford Town Centre	0.4%	10.7%	0.0%	0.0%	5.8%
Central London	2.7%	1.7%	16.7%	32.4%	7.7%
Canary Wharf	0.3%	0.0%	8.0%	0.0%	2.4%
Beckton: Triangle Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%
Beckton: Gallions Reach Shopping Park	2.3%	0.0%	2.2%	0.0%	0.9%
Beckton: Other	1.3%	0.0%	0.6%	0.0%	0.3%
All Other Centres / Stores	53.7%	56.1%	27.6%	34.3%	46.3%
Subtotal	64.1%	78.8%	55.5%	66.6%	69.6%
Special Forms of Trading / Internet Shopping	9.7%	11.7%	18.7%	31.7%	14.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX 9: FORECAST CONVENIENCE GOODS TURNOVER

TABLE 1: ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

ALL CONVENIENCE GOODS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	0.7%	0.0%	0.7%	0.0%	0.2%
Marks & Spencer, Westfield, Stratford City	0.7%	0.0%	0.2%	0.0%	0.1%
Waitrose, Westfield Stratford City	0.3%	0.2%	0.0%	0.0%	0.1%
Sainsbury's Superstore, The Mall, Stratford	3.4%	0.1%	11.2%	0.0%	2.6%
Tesco Express, High Street, Stratford	0.7%	0.0%	0.3%	0.0%	0.2%
All Other Stratford Town Centre	1.4%	0.1%	0.1%	0.0%	0.2%
Subtotal	7.4%	0.3%	12.5%	0.0%	3.5%
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	0.5%	0.5%	0.0%	0.0%	0.3%
Tesco Superstore, Hancock Road, Bromley-by-Bow	1.1%	0.0%	4.6%	0.0%	1.0%
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	0.0%	0.0%	0.4%	0.0%	0.1%
Other Bromley-by-Bow	0.2%	0.0%	0.4%	0.0%	0.1%
Subtotal	1.8%	0.5%	5.4%	0.0%	1.5%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	8.9%	0.3%	0.5%	0.0%	1.5%
Tesco Express, Romford Road, Stratford	0.0%	0.1%	0.3%	0.0%	0.1%
Subtotal	8.9%	0.4%	0.7%	0.0%	1.6%
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	1.5%	3.8%	0.0%	0.0%	1.7%
ASDA Merrielands Crescent	0.4%	2.6%	0.0%	0.0%	1.1%
Tesco Extra, High Road, Goodmayes, Romford	0.8%	7.0%	0.0%	0.0%	2.9%
Asda, Tollgate Road, Beckton	5.0%	1.9%	0.0%	0.0%	1.5%
Asda, East Ferry, Isle of Dogs	0.4%	0.0%	10.3%	0.0%	2.0%
Sainsburys Superstore, Cambridge Heath, Whitechapel	0.4%	0.0%	12.4%	0.0%	2.4%
Waitrose, Canada Square, Canary Wharf	0.0%	0.0%	3.7%	0.0%	0.7%
Sainsburys Superstore, Camden Road, Camden	0.0%	0.0%	0.0%	4.5%	1.2%
Sainsburys Superstore, Liverpool Road, Islington	0.0%	0.0%	0.0%	8.3%	2.3%
Waitrose, Holloway Road, Holloway	0.0%	0.0%	0.0%	7.3%	2.0%
All Other Centres / Stores	73.5%	83.5%	55.0%	79.8%	75.7%
Subtotal	81.8%	98.8%	81.4%	100.0%	93.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	457.8	1316.5	631.7	920.5	3326.5
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	£3.4	£0.0	£4.7	£0.0	£8.1
Marks & Spencer, Westfield, Stratford City	£3.3	£0.0	£1.1	£0.0	£4.3
Waitrose, Westfield Stratford City	£1.5	£2.1	£0.0	£0.0	£3.6
Sainsbury's Superstore, The Mall, Stratford	£15.7	£1.1	£70.5	£0.0	£87.3
Tesco Express, High Street, Stratford	£3.4	£0.0	£1.9	£0.0	£5.3
All Other Stratford Town Centre	£6.6	£1.0	£0.5	£0.0	£8.1
Subtotal	£33.9	£4.1	£78.7	£0.0	£116.7
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	£2.5	£6.7	£0.3	£0.0	£9.5
Tesco Superstore, Hancock Road, Bromley-by-Bow	£5.1	£0.0	£28.8	£0.0	£33.9
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	£0.0	£0.0	£2.3	£0.0	£2.3
Other Bromley-by-Bow	£0.8	£0.0	£2.7	£0.0	£3.5
Subtotal	£8.4	£6.7	£34.1	£0.0	£49.3
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£40.9	£4.1	£2.9	£0.0	£48.0
Tesco Express, Romford Road, Stratford	£0.0	£1.1	£1.8	£0.0	£2.9
Subtotal	£40.9	£5.2	£4.7	£0.0	£50.8
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	£6.9	£50.5	£0.0	£0.0	£57.3
ASDA Merriellands Crescent	£1.6	£33.7	£0.0	£0.0	£35.3
Tesco Extra, High Road, Goodmayes, Romford	£3.4	£92.3	£0.0	£0.0	£95.8
Asda, Tollgate Road, Beckton	£22.9	£25.0	£0.0	£0.0	£48.0
Asda, East Ferry, Isle of Dogs	£1.7	£0.0	£64.8	£0.0	£66.5
Sainsburys Superstore, Cambridge Heath, Whitechapel	£1.7	£0.0	£78.1	£0.0	£79.8
Waitrose, Canada Square, Canary Wharf	£0.0	£0.0	£23.7	£0.0	£23.7
Sainsburys Superstore, Camden Road, Camden	£0.0	£0.0	£0.0	£41.8	£41.8
Sainsburys Superstore, Liverpool Road, Islington	£0.0	£0.0	£0.0	£76.7	£76.7
Waitrose, Holloway Road, Holloway	£0.0	£0.0	£0.0	£67.5	£67.5
All Other Centres / Stores	£336.3	£1,099.0	£347.5	£734.4	£2,517.2
Subtotal	£374.6	£1,300.5	£514.2	£920.5	£3,109.7
TOTAL	£457.8	£1,316.5	£631.7	£920.5	£3,326.5

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	498.4	1371.4	667.0	955.3	3492.2
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	£3.7	£0.0	£4.9	£0.0	£8.6
Marks & Spencer, Westfield, Stratford City	£3.5	£0.0	£1.2	£0.0	£4.7
Waitrose, Westfield Stratford City	£1.7	£2.1	£0.0	£0.0	£3.8
Sainsbury's Superstore, The Mall, Stratford	£17.1	£1.1	£74.5	£0.0	£92.7
Tesco Express, High Street, Stratford	£3.7	£0.0	£2.0	£0.0	£5.7
All Other Stratford Town Centre	£7.1	£1.0	£0.5	£0.0	£8.7
Subtotal	£36.9	£4.3	£83.1	£0.0	£124.2
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	£2.7	£7.0	£0.3	£0.0	£10.0
Tesco Superstore, Hancock Road, Bromley-by-Bow	£5.6	£0.0	£30.4	£0.0	£36.0
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	£0.0	£0.0	£2.4	£0.0	£2.4
Other Bromley-by-Bow	£0.9	£0.0	£2.9	£0.0	£3.8
Subtotal	£9.2	£7.0	£36.1	£0.0	£52.2
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£44.5	£4.3	£3.1	£0.0	£51.9
Tesco Express, Romford Road, Stratford	£0.0	£1.1	£1.9	£0.0	£3.0
Subtotal	£44.5	£5.4	£5.0	£0.0	£54.9
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	£7.5	£52.6	£0.0	£0.0	£60.0
ASDA Merriellands Crescent	£1.7	£35.1	£0.0	£0.0	£36.9
Tesco Extra, High Road, Goodmayes, Romford	£3.8	£96.2	£0.0	£0.0	£99.9
Asda, Tollgate Road, Beckton	£25.0	£26.1	£0.0	£0.0	£51.0
Asda, East Ferry, Isle of Dogs	£1.9	£0.0	£68.4	£0.0	£70.3
Sainsburys Superstore, Cambridge Heath, Whitechapel	£1.9	£0.0	£82.5	£0.0	£84.4
Waitrose, Canada Square, Canary Wharf	£0.0	£0.0	£25.0	£0.0	£25.0
Sainsburys Superstore, Camden Road, Camden	£0.0	£0.0	£0.0	£43.4	£43.4
Sainsburys Superstore, Liverpool Road, Islington	£0.0	£0.0	£0.0	£79.6	£79.6
Waitrose, Holloway Road, Holloway	£0.0	£0.0	£0.0	£70.1	£70.1
All Other Centres / Stores	£366.2	£1,144.8	£367.0	£762.2	£2,640.2
Subtotal	£407.9	£1,354.7	£542.9	£955.3	£3,260.8
TOTAL	£498.4	£1,371.4	£667.0	£955.3	£3,492.2

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	566.5	1461.8	718.8	1007.1	3754.3
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	£4.2	£0.0	£5.3	£0.0	£9.5
Marks & Spencer, Westfield, Stratford City	£4.0	£0.0	£1.2	£0.0	£5.3
Waitrose, Westfield Stratford City	£1.9	£2.3	£0.0	£0.0	£4.2
Sainsbury's Superstore, The Mall, Stratford	£19.5	£1.2	£80.2	£0.0	£100.9
Tesco Express, High Street, Stratford	£4.2	£0.0	£2.2	£0.0	£6.3
All Other Stratford Town Centre	£8.1	£1.1	£0.6	£0.0	£9.8
Subtotal	£41.9	£4.6	£89.5	£0.0	£136.0
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	£3.1	£7.5	£0.3	£0.0	£10.9
Tesco Superstore, Hancock Road, Bromley-by-Bow	£6.3	£0.0	£32.8	£0.0	£39.1
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	£0.0	£0.0	£2.6	£0.0	£2.6
Other Bromley-by-Bow	£1.0	£0.0	£3.1	£0.0	£4.1
Subtotal	£10.4	£7.5	£38.9	£0.0	£56.8
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£50.6	£4.6	£3.3	£0.0	£58.5
Tesco Express, Romford Road, Stratford	£0.0	£1.2	£2.0	£0.0	£3.2
Subtotal	£50.6	£5.8	£5.4	£0.0	£61.8
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	£8.5	£56.0	£0.0	£0.0	£64.5
ASDA Merriellands Crescent	£2.0	£37.4	£0.0	£0.0	£39.4
Tesco Extra, High Road, Goodmayes, Romford	£4.3	£102.5	£0.0	£0.0	£106.8
Asda, Tollgate Road, Beckton	£28.4	£27.8	£0.0	£0.0	£56.2
Asda, East Ferry, Isle of Dogs	£2.1	£0.0	£73.7	£0.0	£75.9
Sainsburys Superstore, Cambridge Heath, Whitechapel	£2.1	£0.0	£88.9	£0.0	£91.0
Waitrose, Canada Square, Canary Wharf	£0.0	£0.0	£27.0	£0.0	£27.0
Sainsburys Superstore, Camden Road, Camden	£0.0	£0.0	£0.0	£45.8	£45.8
Sainsburys Superstore, Liverpool Road, Islington	£0.0	£0.0	£0.0	£84.0	£84.0
Waitrose, Holloway Road, Holloway	£0.0	£0.0	£0.0	£73.9	£73.9
All Other Centres / Stores	£416.2	£1,220.3	£395.5	£803.5	£2,835.5
Subtotal	£463.5	£1,444.0	£585.1	£1,007.1	£3,499.8
TOTAL	£566.5	£1,461.8	£718.8	£1,007.1	£3,754.3

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	620.8	1544.9	765.5	1055.4	3986.6
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	£4.6	£0.0	£5.6	£0.0	£10.3
Marks & Spencer, Westfield, Stratford City	£4.4	£0.0	£1.3	£0.0	£5.7
Waitrose, Westfield Stratford City	£2.1	£2.4	£0.0	£0.0	£4.5
Sainsbury's Superstore, The Mall, Stratford	£21.3	£1.2	£85.5	£0.0	£108.0
Tesco Express, High Street, Stratford	£4.6	£0.0	£2.3	£0.0	£6.9
All Other Stratford Town Centre	£8.9	£1.2	£0.6	£0.0	£10.7
Subtotal	£45.9	£4.8	£95.3	£0.0	£146.1
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	£3.4	£7.9	£0.4	£0.0	£11.6
Tesco Superstore, Hancock Road, Bromley-by-Bow	£7.0	£0.0	£34.9	£0.0	£41.9
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	£0.0	£0.0	£2.8	£0.0	£2.8
Other Bromley-by-Bow	£1.1	£0.0	£3.3	£0.0	£4.4
Subtotal	£11.4	£7.9	£41.4	£0.0	£60.7
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£55.4	£4.9	£3.6	£0.0	£63.9
Tesco Express, Romford Road, Stratford	£0.0	£1.2	£2.2	£0.0	£3.4
Subtotal	£55.4	£6.1	£5.7	£0.0	£67.3
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	£9.3	£59.2	£0.0	£0.0	£68.5
ASDA Merriellands Crescent	£2.2	£39.6	£0.0	£0.0	£41.7
Tesco Extra, High Road, Goodmayes, Romford	£4.7	£108.3	£0.0	£0.0	£113.0
Asda, Tollgate Road, Beckton	£31.1	£29.4	£0.0	£0.0	£60.5
Asda, East Ferry, Isle of Dogs	£2.3	£0.0	£78.5	£0.0	£80.8
Sainsburys Superstore, Cambridge Heath, Whitechapel	£2.3	£0.0	£94.7	£0.0	£97.0
Waitrose, Canada Square, Canary Wharf	£0.0	£0.0	£28.7	£0.0	£28.7
Sainsburys Superstore, Camden Road, Camden	£0.0	£0.0	£0.0	£48.0	£48.0
Sainsburys Superstore, Liverpool Road, Islington	£0.0	£0.0	£0.0	£88.0	£88.0
Waitrose, Holloway Road, Holloway	£0.0	£0.0	£0.0	£77.4	£77.4
All Other Centres / Stores	£456.0	£1,289.6	£421.2	£842.1	£3,008.9
Subtotal	£507.9	£1,526.1	£623.1	£1,055.4	£3,712.5
TOTAL	£620.8	£1,544.9	£765.5	£1,055.4	£3,986.6

TABLE 6: 2036 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	661.6	1625.5	810.1	1103.6	4200.8
Stratford Town Centre					
Lidl, Stratford Centre, Stratford	£4.9	£0.0	£6.0	£0.0	£10.9
Marks & Spencer, Westfield, Stratford City	£4.7	£0.0	£1.4	£0.0	£6.1
Waitrose, Westfield Stratford City	£2.2	£2.5	£0.0	£0.0	£4.8
Sainsbury's Superstore, The Mall, Stratford	£22.7	£1.3	£90.4	£0.0	£114.5
Tesco Express, High Street, Stratford	£4.9	£0.0	£2.4	£0.0	£7.3
All Other Stratford Town Centre	£9.5	£1.2	£0.6	£0.0	£11.3
Subtotal	£49.0	£5.1	£100.9	£0.0	£154.9
Local Centres					
Sainsbury's Local, Celebration Avenue, East Village	£3.6	£8.3	£0.4	£0.0	£12.3
Tesco Superstore, Hancock Road, Bromley-by-Bow	£7.4	£0.0	£36.9	£0.0	£44.3
Sainsburys Local, Bromley-by-Bow Station, Bromley-by-Bow	£0.0	£0.0	£3.0	£0.0	£3.0
Other Bromley-by-Bow	£1.2	£0.0	£3.5	£0.0	£4.7
Subtotal	£12.2	£8.3	£43.8	£0.0	£64.3
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£59.1	£5.1	£3.8	£0.0	£68.0
Tesco Express, Romford Road, Stratford	£0.0	£1.3	£2.3	£0.0	£3.6
Subtotal	£59.1	£6.4	£6.1	£0.0	£71.6
Other Dominant Stores Outside Stratford					
Sainsburys, George Lane, Ilford	£9.9	£62.3	£0.0	£0.0	£72.2
ASDA Merriellands Crescent	£2.3	£41.6	£0.0	£0.0	£44.0
Tesco Extra, High Road, Goodmayes, Romford	£5.0	£114.0	£0.0	£0.0	£119.0
Asda, Tollgate Road, Beckton	£33.2	£30.9	£0.0	£0.0	£64.0
Asda, East Ferry, Isle of Dogs	£2.5	£0.0	£83.1	£0.0	£85.6
Sainsburys Superstore, Cambridge Heath, Whitechapel	£2.5	£0.0	£100.2	£0.0	£102.7
Waitrose, Canada Square, Canary Wharf	£0.0	£0.0	£30.4	£0.0	£30.4
Sainsburys Superstore, Camden Road, Camden	£0.0	£0.0	£0.0	£50.1	£50.1
Sainsburys Superstore, Liverpool Road, Islington	£0.0	£0.0	£0.0	£92.0	£92.0
Waitrose, Holloway Road, Holloway	£0.0	£0.0	£0.0	£80.9	£80.9
All Other Centres / Stores	£486.1	£1,356.9	£445.7	£880.5	£3,169.2
Subtotal	£541.4	£1,605.7	£659.4	£1,103.6	£3,910.0
TOTAL	£661.6	£1,625.5	£810.1	£1,103.6	£4,200.8

APPENDIX 10: FORECAST COMPARISON GOODS TURNOVER

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
Stratford					
Stratford (including Westfield Stratford City)	38.5%	13.1%	28.2%	2.4%	16.9%
Local Centres					
Bromley-by-Bow	0.1%	0.0%	0.7%	0.0%	0.1%
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	0.1%	0.0%	0.0%	0.0%	0.0%
Other Dominant Centres					
Ilford Town Centre	3.0%	12.5%	0.4%	0.0%	5.8%
Romford Town Centre	0.7%	10.2%	0.3%	0.0%	4.5%
Central London	3.3%	2.9%	16.7%	31.1%	12.6%
Canary Wharf	0.2%	0.0%	6.0%	1.5%	1.5%
Beckton: Triangle Retail Park	1.4%	0.0%	2.4%	0.0%	0.7%
Beckton: Gallions Reach Shopping Park	1.8%	0.0%	3.6%	0.0%	0.9%
Beckton: Other	3.2%	0.0%	2.5%	0.0%	0.9%
All Other Centres / Stores	47.7%	61.1%	39.2%	65.0%	56.0%
Subtotal	61.3%	86.9%	71.1%	97.6%	83.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:					
	594.9	1847.3	887.0	1315.0	4644.1
Stratford					
Stratford (including Westfield Stratford City)	£229.1	£242.7	£250.1	£31.2	£753.2
Local Centres					
Bromley-by-Bow	£0.4	£0.0	£6.3	£0.0	£6.7
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£0.5	£0.0	£0.0	£0.0	£0.5
Other Dominant Centres					
Ilford Town Centre	£17.9	£231.6	£4.0	£0.0	£253.5
Romford Town Centre	£4.3	£189.1	£2.4	£0.6	£196.4
Central London	£19.4	£54.4	£148.2	£408.7	£630.7
Canary Wharf	£1.5	£0.0	£53.2	£19.5	£74.2
Beckton: Triangle Retail Park	£8.4	£0.0	£21.4	£0.0	£29.8
Beckton: Gallions Reach Shopping Park	£10.6	£0.0	£31.6	£0.3	£42.5
Beckton: Other	£19.2	£0.0	£21.9	£0.1	£41.2
All Other Centres / Stores	£283.6	£1,129.4	£347.9	£854.6	£2,615.5
Subtotal	£364.9	£1,604.5	£630.6	£1,283.8	£3,883.8
TOTAL	£594.9	£1,847.3	£887.0	£1,315.0	£4,644.1

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	694.3	2062.9	1004.1	1463.1	5224.4
Stratford					
Stratford (including Westfield Stratford City)	£267.4	£271.1	£283.1	£34.7	£856.3
Local Centres					
Bromley-by-Bow	£0.4	£0.0	£7.2	£0.0	£7.6
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£0.6	£0.0	£0.0	£0.0	£0.6
Other Dominant Centres					
Ilford Town Centre	£20.9	£258.7	£4.5	£0.0	£284.1
Romford Town Centre	£5.1	£211.2	£2.7	£0.6	£219.6
Central London	£22.7	£60.7	£167.8	£454.8	£705.9
Canary Wharf	£1.7	£0.0	£60.2	£21.7	£83.6
Beckton: Triangle Retail Park	£9.9	£0.0	£24.2	£0.0	£34.1
Beckton: Gallions Reach Shopping Park	£12.4	£0.0	£35.8	£0.3	£48.5
Beckton: Other	£22.4	£0.0	£24.8	£0.1	£47.3
All Other Centres / Stores	£331.0	£1,261.2	£393.8	£950.8	£2,936.9
Subtotal	£425.9	£1,791.8	£713.8	£1,428.3	£4,359.9
TOTAL	£694.3	£2,062.9	£1,004.1	£1,463.1	£5,224.4

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	915.8	2551.9	1255.7	1790.1	6513.6
Stratford					
Stratford (including Westfield Stratford City)	£352.7	£335.3	£354.1	£42.5	£1,084.6
Local Centres					
Bromley-by-Bow	£0.6	£0.0	£9.0	£0.0	£9.5
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£0.7	£0.0	£0.0	£0.0	£0.7
Other Dominant Centres					
Ilford Town Centre	£27.6	£320.0	£5.6	£0.0	£353.2
Romford Town Centre	£6.7	£261.3	£3.4	£0.8	£272.1
Central London	£29.9	£75.1	£209.8	£556.4	£871.2
Canary Wharf	£2.3	£0.0	£75.3	£26.6	£104.1
Beckton: Triangle Retail Park	£13.0	£0.0	£30.3	£0.0	£43.3
Beckton: Gallions Reach Shopping Park	£16.3	£0.0	£44.8	£0.4	£61.5
Beckton: Other	£29.5	£0.0	£31.0	£0.1	£60.6
All Other Centres / Stores	£436.6	£1,560.2	£492.5	£1,163.3	£3,652.7
Subtotal	£561.8	£2,216.6	£892.7	£1,747.6	£5,418.7
TOTAL	£915.8	£2,551.9	£1,255.7	£1,790.1	£6,513.6

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	1167.6	3137.7	1555.7	2182.4	8043.3
Stratford					
Stratford (including Westfield Stratford City)	£449.7	£412.3	£438.7	£51.8	£1,352.5
Local Centres					
Bromley-by-Bow	£0.7	£0.0	£11.1	£0.0	£11.8
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£0.9	£0.0	£0.0	£0.0	£0.9
Other Dominant Centres					
Ilford Town Centre	£35.2	£393.4	£7.0	£0.0	£435.5
Romford Town Centre	£8.5	£321.2	£4.2	£1.0	£334.9
Central London	£38.1	£92.3	£260.0	£678.3	£1,068.8
Canary Wharf	£2.9	£0.0	£93.3	£32.4	£128.6
Beckton: Triangle Retail Park	£16.6	£0.0	£37.5	£0.0	£54.1
Beckton: Gallions Reach Shopping Park	£20.8	£0.0	£55.5	£0.5	£76.7
Beckton: Other	£37.6	£0.0	£38.4	£0.2	£76.2
All Other Centres / Stores	£556.5	£1,918.3	£610.2	£1,418.3	£4,503.4
Subtotal	£716.2	£2,725.3	£1,106.0	£2,130.6	£6,678.1
TOTAL	£1,167.6	£3,137.7	£1,555.7	£2,182.4	£8,043.3

TABLE 6: 2036 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT) £m:	1447.5	3840.0	1915.0	2654.3	9856.8
Stratford					
Stratford (including Westfield Stratford City)	£557.5	£504.6	£539.9	£63.0	£1,665.1
Local Centres					
Bromley-by-Bow	£0.9	£0.0	£13.7	£0.0	£14.5
Stratford Out-of-Centre					
Morrisons, The Grove, Stratford	£1.2	£0.0	£0.0	£0.0	£1.2
Other Dominant Centres					
Ilford Town Centre	£43.6	£481.5	£8.6	£0.0	£533.6
Romford Town Centre	£10.6	£393.1	£5.2	£1.2	£410.0
Central London	£47.3	£113.0	£320.0	£825.0	£1,305.3
Canary Wharf	£3.6	£0.0	£114.8	£39.4	£157.8
Beckton: Triangle Retail Park	£20.6	£0.0	£46.2	£0.0	£66.7
Beckton: Gallions Reach Shopping Park	£25.7	£0.0	£68.3	£0.6	£94.6
Beckton: Other	£46.7	£0.0	£47.3	£0.2	£94.1
All Other Centres / Stores	£690.0	£2,347.8	£751.1	£1,725.0	£5,513.8
Subtotal	£888.0	£3,335.4	£1,361.4	£2,591.3	£8,176.0
TOTAL	£1,447.5	£3,840.0	£1,915.0	£2,654.3	£9,856.8

APPENDIX 11: CONVENIENCE GOODS CAPACITY ASSESSMENT

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

	Estimated 'Inflow' from Outside Study Area	2018	2021	2026	2031	2036
Stratford Town Centre						
Lidl, Stratford Centre, Stratford	1%	£8.2	£8.7	£9.6	£10.4	£11.0
Marks & Spencer, Westfield, Stratford City	1%	£4.4	£4.7	£5.3	£5.8	£6.2
Waitrose, Westfield Stratford City	1%	£3.6	£3.9	£4.2	£4.6	£4.8
Sainsbury's Superstore, The Mall, Stratford	1%	£88.2	£93.6	£101.9	£109.1	£115.6
Tesco Express, High Street, Stratford	1%	£5.3	£5.7	£6.4	£6.9	£7.4
All Other Stratford Town Centre	1%	£8.1	£8.8	£9.9	£10.8	£11.5
Subtotal		£117.8	£125.5	£137.4	£147.6	£156.5
Local Centres						
Sainsbury's Local, Celebration Avenue, East Village	0%	£9.5	£10.0	£10.9	£11.6	£12.3
Tesco Superstore, Hancock Road, Bromley-by-Bow	1%	£34.3	£36.4	£39.5	£42.3	£44.8
Sainsbury's Local, Bromley-by-Bow Station, Bromley-by-Bow	0%	£2.3	£2.4	£2.6	£2.8	£3.0
Other Bromley-by-Bow	0%	£3.5	£3.8	£4.1	£4.4	£4.7
Subtotal		£49.6	£52.6	£57.1	£61.1	£64.7
Stratford Out-of-Centre						
Morrisons, The Grove, Stratford	1%	£48.4	£52.5	£59.1	£64.5	£68.7
Tesco Express, Romford Road, Stratford	0%	£2.9	£3.0	£3.2	£3.4	£3.6
Subtotal		£51.3	£55.5	£62.3	£67.9	£72.3
TOTAL: LLDC AREA		£218.8	£233.5	£256.9	£276.6	£293.5

TABLE 2: COMMITTED CONVENIENCE GOODS FLOORSPACE

Planning Ref	Location	Description of Development	Gross Floorpace	Net Sales Floorpace	Sales Density	Turnover (£m)					
						2018	2021	2026	2031	2036	
(1) 10/90641/EXTODA	Stratford City Site - Stratford Rail Lands, E15 Including Land Bounded By A River Lea, Channelsea River, Eastway Cycle Circuit, Clays Lane, Temple Mill Lane, Land To The Rear Of Henrietta Street And Thornton Grove, Lee Valley	Variation of conditions of Planning Permission (Ref: 07/90023/VARODA) to allow an additional 10 years to submit reserved matters and implement Westfield Stratford City Development. Application to vary conditions B6 and B7 of the Stratford City Outline Planning Permission 07/90023/VARODA to allow an additional 10 years to submit reserved matters and implement the development in Zone 1 (Class B1 only) and Zones 2-7 (all uses). Stratford City Development comprises the comprehensive mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link.									
		Remaining Floorpace by Zone									
		Zone 2: (International Quarter): 2,438 sqm gross at Stratford Metropolitan Centre (including 1,495 sqm gross currently under construction).	813	650	£7,500	£4.9	£4.9	£4.9	£4.9	£4.9	
		Zone 3, 4 & 5: (International Quarter): 6,280 sqm remaining retail floorpace (the floorpace will be split equally between the permitted use classes A1/A2/A3/A4 uses) i.e. 1,570 sqm gross each. Development comprises up to 643,817 sqm of residential (C3) uses, including up to 4,000 sqm of Sheltered Accommodation (C3); up to 14,500sqm of hotel (C1) accommodation; up to 30,369 sqm (B1a) and up to 15,770 sqm (B1b/B1c) business and employment uses; up to 25,987 sqm (A1-A3) shopping, food and drink and financial and professional services; up to 3,606 sqm (D2) leisure space and up to 31,451sqm (D1) community, health, cultural, assembly and education facilities, including two primary schools and one secondary school; new streets and other means of access	1,570	628	£7,500	£4.7	£4.7	£4.7	£4.7	£4.8	
(2) 11/90621/OUTODA	Legacy Communities Scheme:	For the purposes of this assessment, the maximum quantum of proposed retail floorpace for A1 uses is 13,940 sqm gross. From this floorpace, the quantum delivered under Phases 1 and 2 (13/000504/REM - 745 sqm gross of A1-AS floorpace and 14/00356 REM - 495 sqm gross of A1-AS floorpace) has been deducted. On this basis the resultant floorpace is 12,700 sqm gross (2,540 sqm gross each for the following uses: A1; A2; A3; A4; AS) which has been used in this assessment. It is assumed that the A1 floorpace is split equally between comparison and convenience goods.	2,540	1,016	£7,500	£7.6	£7.6	£7.6	£7.7	£7.7	
(3) 17/00344/FUL	Land at Imperial Street, Bromley by Bow London, E3 3ED	Development of a mixed-use scheme for 407 residential units, 339 sqm of employment space and 274 sqm of flexible retail space.	91	73	£7,500	£0.5	£0.5	£0.5	£0.6	£0.6	
(4) 17/003564/FUL	Land at Clockhouse and Access House, Imperial Street, Bromley by Bow , London, E3 3AE	Full planning application for the demolition of the existing buildings on site and the construction of a residential-led mixed use scheme comprising a series of buildings ranging from one to 27 storeys in height to provide 3,570 sq m of flexible community, commercial and retail floorpace (Use Classes A1, A2, A3, A4, B1 and/or D1) at ground and mezzanine floor level, 491 residential units (Use Class C3) on the upper floors, parking/refuse/servicing at basement and ground floor, energy centre, communal amenity areas, and all associated landscaped public open space.	178	142	£7,500	£1.1	£1.1	£1.1	£1.1	£1.1	
(5) 12/00336/LTGOUT	Strand East - Development Site Sugar House Lane Peninsula Sugar House Lane Stratford London	All matters reserved except access; demolition of buildings where stated; 1192 residential units (C3) of which 10% of properties wheelchair accessible; 12,559sqm flexible uses including: retail (A1), financial and professional services (A2), restaurants, cafes and bars (A3/4), offices and workshops (B1), non-residential institution (D1) and assembly and leisure (D2); 33,950sqm offices and works shops (B1); 350 bed hotel (C1); pedestrian bridge across Three Mills River; a riverside park; car, motorcycle and bicycle parking; servicing and ancillary works.	1,600	768	£7,500	£5.8	£5.7	£5.8	£5.8	£5.8	
(6) 16/00166/OUT	Site known as ' Hackney Wick Central '	Outline planning application for 28,281sqm GIA of existing buildings on site and development of a phased comprehensive mixed use development of up to 119,242sqm GIA. Residential (Use Class C3) of up to 78,931sqm to deliver approx. 874 units; Employment (B1a / B1c) of a minimum of 29,908sqm; Retail (A1-A4) of up to 4,493sqm; and Community Facilities (D1/D2) for a minimum of 381sqm and up to 2,318sqm; with up to 3,593sqm of on plot undercroft or basement car parking, together with a minimum of 23,359sqm public realm, playspace, open space and associated vehicle access.	4,493	581	£7,500	£4.4	£4.4	£4.4	£4.4	£4.4	
TOTAL			11,285	3,859		£28.9	£28.9	£28.9	£29.1	£29.2	

Notes:

- (1) 10/90641/EXTODA - Overriding Stratford City Permission Remaining Floorpace by Zone
Zone 2: (International Quarter): Applied gross to net ratio of 80%, and assuming that all (100%) A1 is for convenience goods.
Zone 3, 4 & 5: (International Quarter): Applied gross to net of 80% and assuming that A1 comparison goods floorpace to be 50% and the remainder (50%) for convenience goods.
- (2) 11/90621/OUTODA - Applied gross to net of 80% and assuming that A1 comparison goods floorpace to be 50% and the remainder (50%) for convenience goods.
- (3) 17/00344/FUL - Applied gross to net of 80%, and assuming that all A1 (100%) is for convenience goods.
- (4) 17/003564/FUL - Applied gross to net of 80% and assuming that all A1 (100%) is for convenience goods.
- (5) 12/00336/LTGOUT - Applied gross to net of 80% and assuming that A1 comparison goods floorpace to be 40% and the remainder (60%) for convenience goods.
- (6) 16/00166/OUT - Note net floorpace proposed for A1 uses is 969 sqm net of which it is assumed that comparison goods floorpace will be 40% and the remainder (60%) for convenience goods.

TABLE 3: LLDG AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2018	2021	2026	2031	2036	
STEP 1:	TOTAL FORECAST "CURRENT" TURNOVER OF ALL FLOORSPACE (£m):					
	£218.8	£233.5	£256.9	£276.6	£293.5	
STEP 2:	TOTAL FORECAST "BENCHMARK" TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :					
	£218.8	£218.3	£218.8	£219.9	£221.0	
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):					
	-	£15.2	£38.1	£56.7	£72.5	
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
	-	£28.9	£28.9	£29.1	£29.2	
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:					
	-	£13.7	£9.1	£27.7	£43.3	
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,976	£12,000	£12,060	£12,121
	(ii) Net Floorspace Capacity (sq m):	-	-1,142	762	2,293	3,570
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-1,631	1,089	3,276	5,100	5,100
STEP 7:	FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,485	£7,500	£7,538	£7,675
	(ii) Net Floorspace Capacity (sq m):	-	-1,827	1,220	3,669	5,712
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-2,610	1,743	5,241	8,160	8,160

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Exoerian Retail Planner Briefing Note 15 (December 2017) and other research evidence. The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 3: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2021.

STEP 4: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 5: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

STEP 6 & 7:

APPENDIX 12: COMPARISON GOODS CAPACITY ASSESSMENT

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

Centre	Estimated 'Inflow' from Outside Study Area	2018	2021	2026	2031	2036
Stratford						
Stratford (including Westfield Stratford City)	40%	£1,255.3	£1,427.2	£1,807.7	£2,254.1	£2,775.1
Local Centres						
Bromley-by-Bow	0%	£6.7	£7.6	£9.5	£11.8	£14.5
Stratford Out-of-Centre						
Morrisons, The Grove, Stratford	0%	£0.5	£0.6	£0.7	£0.9	£1.2
TOTAL: LLDC AREA		£1,262.4	£1,435.4	£1,818.0	£2,266.8	£2,790.8

TABLE 2: COMMITTED COMPARISON

Planning Reference	Location	Description of Development	Gross Floorspace	Net Sales Floorspace	Sales Density 2018	Turnover (£m)					
						2018	2021	2026	2031	2036	
(1) 10/90641/EXTODA	Stratford City Site - Stratford Rail Lands, E15 Including Land Bounded By A River Lea, Channelsea River, Eastway Cycle Circuit, Clays Lane, Temple Mill Lane, Land To The Rear Of Henrietta Street And Thornton Grove, Lee Valley	Variation of conditions of Planning Permission (Ref: 07/90023/VARODA) to allow an additional 10 years to submit reserved matters and implement Westfield Stratford City Development. Application to vary conditions B6 and B7 of the Stratford City Outline Planning Permission 07/90023/VARODA to allow an additional 10 years to submit reserved matters and implement the development in Zone 1 (Class B1 only) and Zones 2-7 (all uses). Stratford City Development comprises the comprehensive mixed use development of the rail lands site for B1 offices, residential, retail development in the full range of A1, A2 and A3 uses, commercial leisure uses, hotels and conference facilities, open space, landscaping, water features, parking, transport interchanges, associated infrastructure and a town centre link.									
		Zone 1: 15/00358/OUT - Cherry Park , Stratford City, E20 1EJ - Residential floorspace (up to 105,000 sq.m GEA and commercial floorspace of up to 3,300 sq.m GEA); and full planning application for 10,902 sq.m (GEA) Class A1 retail anchor store as an extension to Westfield Stratford City (of which 1,814 sqm GEA is existing).	8,910	7,128	£8,000	£57.0	£60.8	£67.9	£75.7	£84.4	
		Zone 3, 4 & 5: (International Quarter) ; 6,280 sqm remaining retail floorspace (the floorspace will be split equally between the permitted use classes A1/A2/A3/A4 uses) i.e. 1,570 sqm gross each	1,570	628	£6,000	£3.8	£4.0	£4.5	£5.0	£5.6	
(2) 17/00032/FUL	Westfield Stratford City, Montfichet Road, Queen Elizabeth Olympic Park, Stratford, E20 1EJ	Extension to Westfield Stratford City (Phase 2) via the Removal of Level 10, Change of Use from Car Parking to Retail (Use Classes A1-A4 14,532sq.m GIA, plus Ancillary and Back of House space 9,429sq.m GIA) and Levels Change at Level 08; re-provision of Car Parking at new Level 04 following Excavation (20,238sq.m GIA); Insertion of Two Escalator Structures on Level 14 (The Street), and; Associated Internal/Below Grade Works to facilitate Vehicle, Pedestrian and Services Connectivity (Including Plant at Levels 30 and 40).	14,532	9,300	£8,000	£74.4	£79.3	£88.6	£98.7	£110.1	
(3) 11/90621/OUTODA	Legacy Communities Scheme	Development comprises up to 641,817 sqm of residential (C3) uses, including up to 4,000 sqm of Sheltered Accommodation (C3); up to 14,500sqm of hotel (C1) accommodation; up to 30,369 sqm (B1a) and up to 15,770 sqm (B1b/B1c) business and employment uses; up to 25,987 sqm (A1-A5) shopping, food and drink and financial and professional services; up to 3,606 sqm (D2) leisure space and up to 31,451sqm (D1) community, health, cultural, assembly and education facilities, including two primary schools and one secondary school; new streets and other means of access and circulation.									
		For the purposes of this assessment, the maximum quantum of proposed retail floorspace for A1 uses is 13,940 sqm gross. From this floorspace, the quantum delivered under Phases 1 and 2 (13/000504/REM - 745 sqm gross of A1-A5 floorspace and 14/00356 REM - 495 sqm gross of A1-A5 floorspace) has been deducted. On this basis the resultant floorspace is 12,700 sqm gross (2,540 sqm gross each for the following uses: A1; A2; A3; A4; A5) which has been used in this assessment. It is assumed that the A1 floorspace is split equally between comparison and convenience goods.	2,540	1,016	£5,000	£5.1	£5.4	£6.0	£6.7	£7.5	
(4) 12/00336/LTGOUT	Strand East - Development Site Sugar House Lane Peninsula Sugar House Lane Stratford London	All matters reserved except access; demolition of buildings where stated; 1192 residential units (C3) of which 10% of properties wheelchair accessible; 12,593sqm flexible uses including retail (A1), financial and professional services (A2), restaurants, cafes and bars (A3/4), offices and workshops (B1), non-residential institution (D1) and assembly and leisure (D2); 33,950sqm offices and works shops (B1); 350 bed hotel (C1); pedestrian bridge across Three Mills River; a riverside park; car, motorcycle and bicycle parking; servicing and ancillary works.	1,600	512	£5,000	£2.6	£2.7	£3.0	£3.4	£3.8	
(5) 16/00166/OUT	Site known as 'Hackney Wick Central'	Outline planning application for 28,281sqm GIA of existing buildings on site and development of a phased comprehensive mixed use development of up to 119,242sqm GIA. Residential (Use Class C3) of up to 78,931sqm to deliver approx. 874 units; Employment (B1a / B1c) of a minimum of 29,908sqm; Retail (A1-A4) of up to 4,493sqm; and Community Facilities (D1/D2) for a minimum of 381sqm and up to 2,318sqm; with up to 3,593sqm of on plot undercroft or basement car parking, together with a minimum of 23,359sqm public realm, playspace, open space and associated vehicle access.	4,493	388	£5,000	£1.9	£2.1	£2.3	£2.6	£2.9	
TOTAL			33,645	18,972		£144.8	£154.2	£172.3	£192.1	£214.2	

(1) 10/90641/EXTODA - Applied gross to net ratio of 80%, thereafter split of Comparison goods (60%) and Convenience goods (40%).
 Zone 1: 15/00358/FUL - Applied gross to net of 80% and assuming that this is entirely for comparison goods.
 Zone 3, 4 & 5: (International Quarter): Applied gross to net of 80% and assuming that A1 comparison goods floorspace to be 50% and the remainder (50%) for convenience goods.
 (2) 17/00032/FUL - Applied gross to net of 80% and assuming that A1 comparison goods floorspace to be 80% and the remainder (20%) leisure (A3-A4).
 (3) 11/90621/OUTODA - Applied gross to net of 80% and assuming that A1 comparison goods floorspace to be 40% and the remainder (50%) for convenience goods.
 (4) 12/00336/LTGOUT - Applied gross to net of 80% and assuming that A1 comparison goods floorspace to be 40% and the remainder (60%) for convenience goods.
 (5) 16/00166/OUT - Note net floorspace proposed for A1 uses is 969 sqm net of which it is assumed that comparison goods floorspace will be 40% and the remainder (60%) for convenience goods.

TABLE 3: LLDC AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2021	2026	2031	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£1,262.4	£1,435.4	£1,818.0	£2,266.8	£2,790.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£1,262.4	£1,345.0	£1,502.5	£1,675.2	£1,867.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£90.4	£315.5	£591.6	£923.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£154.2	£172.3	£192.1	£214.2
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-£63.8	£143.2	£399.5	£708.8
STEP 6:	FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,392	£7,141	£7,962	£8,877
	(ii) Net Floorspace Capacity (sq m):	-	-9,985	20,048	50,180	79,852
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-14,264	28,640	71,686	114,075

STEP 1:
STEP 2:

The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1). It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 15 (December 2017) and other research evidence.

STEP 3:
STEP 4:
STEP 5:
STEP 6:

The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage. The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will have reached 'mature' trading. The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4). The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

APPENDIX 13: GLOSSARY

GLOSSARY

TOWN CENTRES:	Town are the principal centre or centres in a local authority's area. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
MAJOR CENTRES	Major centres are typically found in Inner London and often have a borough wide catchment. They generally contain over 50,000sqm of retail, leisure and service floorspace with a higher proportion of comparison over convenience goods; and potentially significant employment, service and civic functions.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. These centres generally contain between 10,000-50,000sqm of retail, leisure and service floorspace; and provide a higher proportion of convenience over comparison goods.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office, a pharmacy or a launderette.
TOWN CENTRE USES:	As defined in the NPPF, main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined in Local Plans and on the policies map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	As defined in the NPPF, For retail purposes a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a town centre. Out-of-centre locations are at the bottom of the retail hierarchy and any application for retail development in an out-of-centre location must fully assess impacts and rule out potential for locating in a more sequentially preferable location.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.

CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.