London Borough of Havering

Havering Retail and Commercial Leisure Needs Assessment

2018 Quantitative Update Addendum

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CONTENTS

1 INTRODUCTION 1
Summary of the 2015 study's findings 1
Structure of this study.. 3

2 DATA INPUTS 4
Household survey 4
Population forecasts.. 4
Retail and leisure expenditure data 5
Sales densities and floorspace efficiencies 7
Commitments 8
Summary.. 8

3 UPDATED CAPACITY FORECASTS 10
Comparison goods capacity 10
Convenience floorspace capacity 11
A3-5 leisure capacity 11

4 CONCLUSIONS AND RECOMMENDATIONS 13
Comparison goods needs...13
Convenience goods needs 14
Leisure needs...14

TABLES

Table 2.1 Study area population projections comparison.. 5
Table 2.2 Commitments on spending 8
Table 3.1 Quantitative comparison floorspace needs 10
Table 3.2 Quantitative comparison floorspace needs – higher sales efficiency sensitivity 10
Table 3.3 Quantitative convenience floorspace needs...11
Table 3.4 Quantitative A3-5 floorspace needs 11
Table 4.1 Comparison goods floorspace needs in Havering (constant market share) – base and higher sales efficiency 13

FIGURES

Figure 2.1 Changes in 2016 per capita spending... 5
Figure 2.2 Changes in per capita spending growth 2016-2031 6
Figure 2.3 Changes in special forms of trading market shares 2016-31 7

APPENDICES

APPENDIX A HOUSEHOLD SURVEY AREA
APPENDIX B QUANTITATIVE RETAIL CAPACITY
APPENDIX C QUANTITATIVE LEISURE NEEDS
APPENDIX D TECHNICAL INPUTS

1 INTRODUCTION

1.1 The London Borough of Havering (LB Havering) commissioned Peter Brett Associates LLP (PBA) to undertake a quantitative update of the 2015 Havering Retail and Commercial Leisure Needs Assessment (April 2015) ('the 2015 study').

1.2 Recognising that the 2015 study was prepared relatively recently, this update focuses on the quantitative inputs to validate and verify the figures informing the new Local Plan. This study should be treated as an addendum to the 2015 study; therefore, we do not as part of this update revisit the policy and market context provided at Sections 1 and 2 of the 2015 study. Similarly, the on-the-ground assessment of the existing network of centres and the qualitative findings of the 2015 study remain valid.

Summary of the 2015 study's findings

1.3 The core recommendations of the 2015 study covered quantitative need in LB Havering, how the need could be met, advice on the network of centres and strategy advice which took account of qualitative factors. Advice was also provided to assist policy formulation, including on boundary recommendations and monitoring guidance, in the emerging Local Plan for the borough.

1.4 In quantitative terms, the key findings were as follows:

- **Comparison goods need** of between 49,500 – 62,000 sqm net by 2031. The higher bound was derived from an increased market share scenario; however, the 2015 study recommended that LB Havering should plan based on the lower constant market share scenario 'given the level of competition that existing in the area'[1]
- **Convenience goods need** of for up to 7,500 sqm net by 2021, increasing to 13,200 sqm net by 2031[2]
- Indicative quantitative need for up to 21,000 sqm gross **Class A3-5 commercial leisure** floorspace by 2031[3]

1.5 Romford was identified as the preferred location for accommodating comparison goods need, subject to the application of the sequential test, with 'more modest allocations being directed to the district centres'. In terms of identifying the scale of comparison growth which LB Havering should plan for, the 2015 study set out three options of how the identified comparison need could be met:

- Meet its need through floorspace i.e. new floorspace being delivered of the scale identified

[1] Para. 7.2.1
[2] Para. 7.2.2
[3] Para. 7.2.3

- Meet its needs (in part or full) through improved turnover performance of existing floorspace i.e. existing floorspace trading more efficiently through e.g. qualitative improvements in stock and vacancies being taken up
- Accept a reducing market share i.e. not planning for quantitative additions to stock or qualitative improvements to existing stock, meaning that neither (or a combination) of the first two options were realised, so that expenditure growth to flows to other destinations outside Havering.

1.6 Having regard to changes in the convenience sector, the 2015 study recommended that convenience goods needs should be met for through smaller-scale developments spread across the borough. The recommended focus of policy was to consider how such convenience floorspace could be accommodated within mixed-use developments, having regard to the sequential approach to site selection.

1.7 Regarding the restructuring of town centres, the 2015 study anticipated that identified commercial leisure needs would for the most part be met through the conversion or reoccupation of existing floorspace. A similar approach to that set out above in relation to meeting convenience needs, of seeking to incorporate food and drink uses into mixed-use developments, was recommended.

1.8 The 2015 study provided strategic advice on the network of centres. For Romford, as the borough's largest centre, the recommendations included: intensification of activity rather than physical expansion, quantitative and qualitative improvement to the food and drink offer, the need for improvements to the stock on South Street and the identification of a potential development site for comparison floorspace through the intensification of The Brewery. There was also reference to the anticipated effects of the then-committed Morrison's development at the former ice rink site on the town centre[4].

1.9 As well as providing boundary recommendations for all the centres, the recommendations for the other centres are summarised as:

- Upminster: vital and viable town centre and only limited intervention necessary, focused on supporting existing retailers through ensuring the collective 'identity' of the centre is strengthened, to maintain the centre's role and function.
- Hornchurch: need for qualitative improvement to commercial leisure offer, including food and drink and also cinema, subject to market demand from operators. Overtrading in the existing Sainsbury's store identified as justification for introducing more choice into the town centre through a second major foodstore.
- Elm Park: need for close monitoring to ensure it is performing to district centre level. Need for a small supermarket of c.1,000 sqm net identified in the eastern part of the centre to improve vitality and viability.
- Collier Row: continued monitoring of vitality and viability to ensure convenience function is protected from out-of-centre competition.

[4] No longer being pursued. Further explanation provided in Section 2

- Harold Hill: significant planned investment through new in-centre library expected to improve vitality and viability by driving footfall in the centre.
- Rainham: need for improved linkages with anchor Tesco store, as well as addressing qualitative concerns including improving retail and service choice within the centre.

1.10 Finally, monitoring guidelines were provided so that LB Havering could clearly understand how identified retail and commercial leisure needs were being met on the ground. These guidelines also referred to the impact changes in inputs to the study might have on identified needs over the period to 2031.

Structure of this study

1.11 This study provides an overview of the key data inputs, including those that have changed and those that remain unchanged, from the 2015 in Section 3. Section 3 summarises the quantitative findings, drawing on Appendices B and C which provide the detailed quantitative workings.

1.12 The appendices contain the updated quantitative workings which underpin this study.

- Appendix B to this study (quantitative retail capacity tables) supersedes Appendix C to the 2015 study
- Appendix C to this study (quantitative leisure needs) supersedes Appendix F to the 2015 study
- Appendix D to this study (technical inputs) supersedes Appendix E to the 2015 study

1.13 Finally, Section 4 sets out the implications of the revised quantitative forecasts for LB Havering and revisits the recommendations made in the 2015 study on how those quantitative needs should be met through the Local Plan.

2 DATA INPUTS

2.1 In this section, we confirm the inputs to this assessment which remain the same as the 2015 study and provide an overview of the changes to key data inputs which inform the capacity update. Specifically, while the household survey has not been updated, the following data inputs have been updated:

- Population forecasts
- Per capita expenditure data
- Special forms of trading (such as online shopping)
- Sales density growth for existing retailers (also known as efficiency gain)
- Commitments to new retail floorspace

2.2 A complete summary of technical inputs is provided at Appendix D.

Household survey

2.3 The update assessment uses the findings of the September 2014 household survey which underpinned the 2015 study, and is provided in full at Volume 3 of that study. A new household survey has not been undertaken primarily because in the three years that have passed, there has been little in the way of on-the-ground change in retail and leisure provision within and around Havering which would significantly alter patterns of shopping and leisure usage.

2.4 While it is acknowledged that there have been a few limited assortment discount foodstore openings, which we itemise below as commitments, their trading patterns are not likely to have matured, so a new household survey may not provide an accurate representation of how these stores will factor into shopping patterns.

2.5 For ease of reference, a plan showing the household survey study area is provided at Appendix A. The analysis of shopping patterns provided in Section 4 of the 2015 study remains the basis of this quantitative update.

Population forecasts

2.6 The capacity update uses the 2014-based population projections for each study zone provided by Experian[5]. This compares to the 2012-based population projections which underpinned the 2015 study.

2.7 We compared this projection with the population projection underpinning the Outer North-East London Strategic Housing Market Assessment Update[6] which forms part of LB Havering's Local Plan evidence base; however, because the population projections within that study do not align to the study area zone boundaries, nor do

[5] Based on the 2014-based Office of National Statistics (ONS) - official Sub-National Population Projections (published June 2016), derived at a postal sector level from Experian's MMG3 GIS software.

[6] ORS, November 2016

they cover the whole study area, we have used Experian's projections, derived from the official ONS 2014-based projections, as a consistent data set.

2.8 The table below compares the previous projections with the updated projections. This shows that the study area's population is lower in 2016 than previously anticipated and that the scale of growth between 2016 and 2031 is also lower.

Table 2.1 Study area population projections comparison

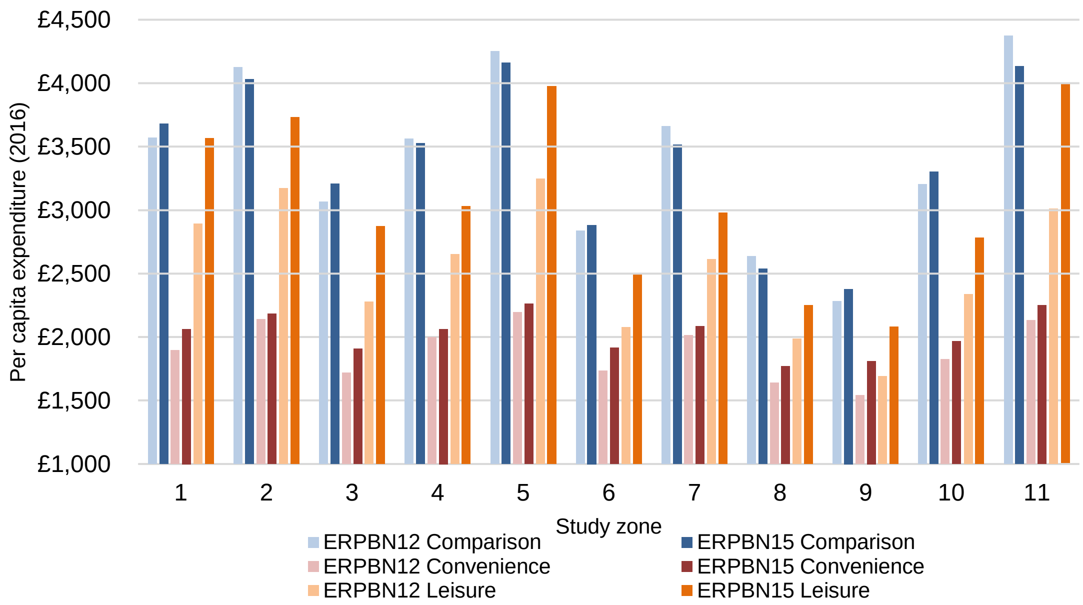
	Source	2016	2017	2021	2026	2029	2031	Change 2016 31
2015 study	2012-based SNPP	455,529	462,169	488,678	520,315	536,975	547,846	92,317
2018 update	2014-based SNPP	447,595	453,489	477,758	507,242	524,121	535,055	87,460

Source: Appendix B & 2015 study

Retail and leisure expenditure data

2.9 This study uses 2016-based comparison (non-food), convenience (food) and leisure per capita spending data provided by Experian[7] for each study zone. Annual expenditure growth has been applied in line with the latest Experian Retail Planner Briefing Note 15 (ERPBN15), published in December 2017. This data, and so all other monetary data in this study, has a 2016 price base, compared to the 2015 study which had a 2012 price base[8].

Figure 2.1 Changes in 2016 per capita spending



Source: ERPBN12 and ERPBN15

[7] Experian MMG3 GIS

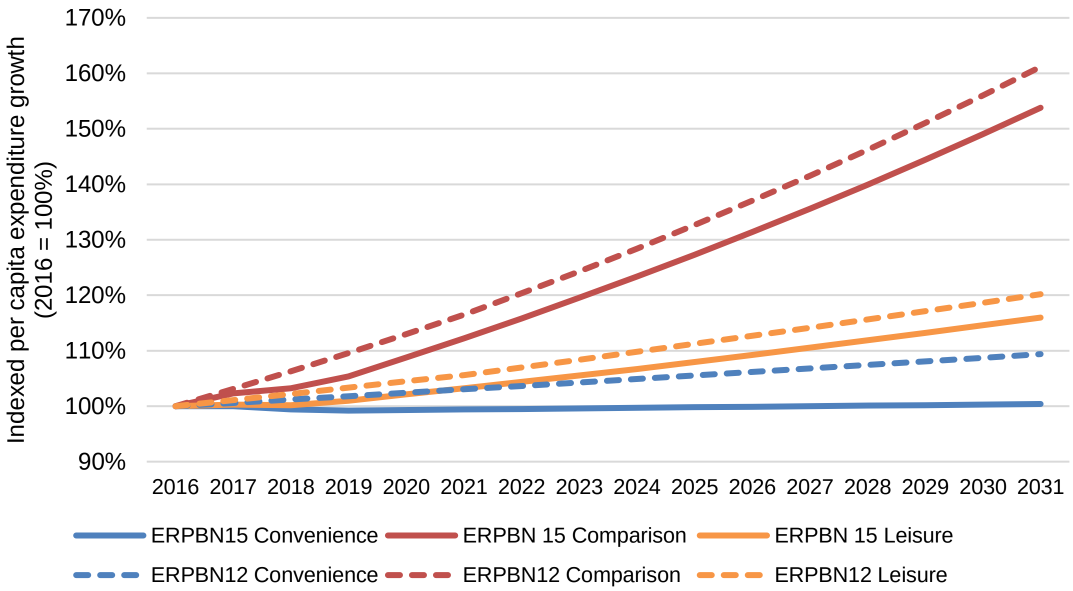
[8] This is not expected to give rise to significant difference. ERPBN15 (Appendix 4b), with 2013=100, records price indices in total retail spending of 98.3 in 2012 and 98.4 in 2016

2.10 The figure above summarises per capita spending on retail and leisure used in this update study compared to the 2015 study.

2.11 This shows that across most zones, the level of per capita convenience and leisure spending in 2016 is higher in the updated data. Although in some zones (1, 3, 6, 9 and 10) the same is true for comparison spending, for the others the reverse is true.

2.12 Looking to the future, the figure below clearly shows how spending growth forecasts have been downgraded in both retail and leisure sectors since the 2015 study. While growth from 2016 spending levels is still forecast for the comparison retail and leisure sectors, the solid blue line shows how per capita convenience spending will remain static.

Figure 2.2 Changes in per capita spending growth 2016-2031



Source: ERPBN15 and ERPBN12 (Experian)

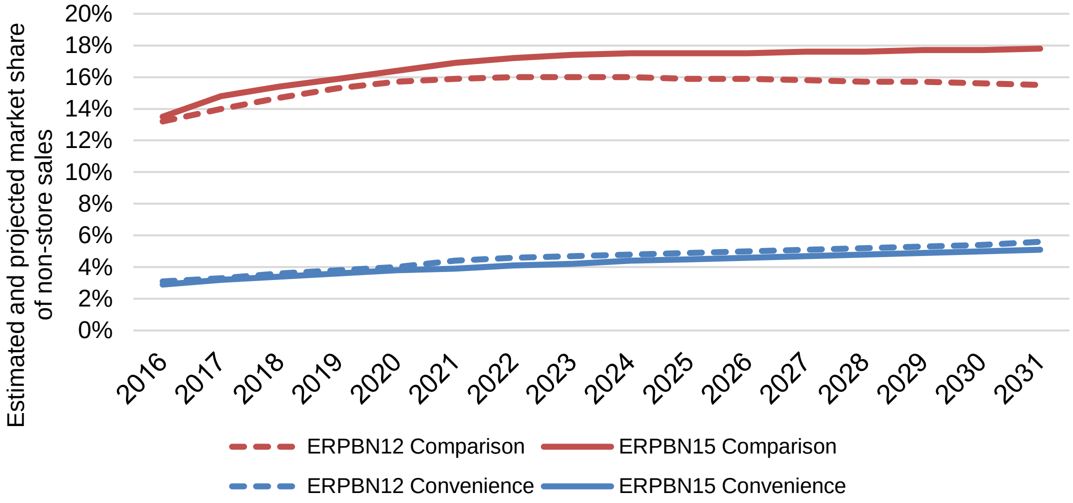
Special forms of trading

2.13 Special forms of trading (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping and TV shopping. SFT acts as a claim on the expenditure available to support the turnover of physical retail outlets.

2.14 This has been deducted from per capita expenditure in the base year (2016) in line with ERPBN15 estimates (13.5% for comparison goods spending, and 2.9% for convenience goods spending). Thereafter, we apply annual growth estimates in line with ERPBN15's central forecast, with deductions to take account of projected SFT growth.

2.15 The figure below shows that for comparison goods, by the end of the study period, the latest data shows that SFT is expected to account for a greater share of available spending than that used in the 2015 study. While the opposite is the case for convenience goods, the difference by the end of the period is only 0.5%.

Figure 2.3 Changes in special forms of trading market shares 2016-31



Source: ERPBN12 and ERPBN15 (adjusted for SFT sales from stores)

Sales densities and floorspace efficiencies

2.16 The 2015 study used sales densities to convert expenditure capacity into floorspace. Sales densities were also used to understand how the main convenience destinations in the study area were trading relative to benchmark sales densities. The 2015 study derived convenience operator sales densities from Verdict (2012); for this update, we use the latest Mintel data (November 2017)[9]. Both are recognised providers of sales density information; however, in the period since the 2015 study was undertaken, PBA have opted to used Mintel data as this is considered better suited for retail planning purposes.

2.17 The 2015 study assumed that comparison goods space would achieve a sales density of £7,000/sqm; £12,500/sqm was used for convenience goods. These assumptions remain robust and so have been adopted in this update.

2.18 To inform our comparison floorspace efficiency assumptions, we have looked at the Consumer Expenditure and Comparison Goods Floorspace Need in London report, prepared on behalf of the Greater London Authority by Experian (October 2017). This tests four different efficiency levels: low (1.5%), base (2%), high (2.5%) and very high (3.2%). For this update study, we have adopted the base level of 2% per annum as a main case; we have also provided a sensitivity based on the high level of 2.5% per annum.

2.19 For convenience floorspace, we have not made any allowance for sales efficiency growth. This reflects the largely static nature of convenience spending growth and the limited change in the main operators' trading densities.

[99] Both Verdict and Mintel are industry-recognised providers of this data. PBA switched to Mintel because it was felt that the method used and the outputs were more suitable for retail planning purposes.

Commitments

2.20 Table 5.2 of the 2015 study sets out the commitments to new floorspace factored into that study. These were a new Morrisons store at Rom Valley Way and the mixed-use redevelopment of the former Decathlon store at Angel Way.

2.21 Discussions with LB Havering have confirmed that the Morrisons development is no longer coming forward; while an application is currently being decided for a new scheme which includes a small portion of retail space, this has not been determined so is not factored into this study. The proposals for the Angel Way scheme have been revised; these have a resolution to grant permission so the latest scheme is included in this study.

2.22 In addition to these, several other applications have been approved in the intervening period since the 2015 study, including some which are already trading. The full list of commitments is summarised in the table below.

Table 2.2 Commitments on spending

Site/reference	Comparison net sales area (sqm)	Comparison turnover 2017 (£M)	Convenience net sales area (sqm)	Convenience turnover 2017 (£M)
Angel Way, Romford P1443.15	762	£5.66	1,172	£14.65
Aldi Collier Row (now trading) P1031.14	151	£1.39	859	£11.79
Lidl Hornchurch P1373.16	254	£1.57	1437	£13.83
Lidl Gooshays Drive P1905.15	204	£1.26	1,157	£11.14
Liberty Shopping Centre extension P1582.11 & P1409.08	1,752	£13.02	-	-
Total	**3,123**	**£5.66**	**4,622**	**£51.41**

Source: LB Havering planning application data

2.23 There has also been changes to the leisure offer in the borough. A new town centre leisure centre, including ice rink, swimming pool and gym, opened in Romford in early 2018. In addition, the Harold Hill library complex, referred to in paragraph 1.9, opened in 2016.

Summary

2.24 To summarise the changes since the 2015 study:

- The study area population in 2016 is marginally lower; and the scale of growth is more limited.
- The latest data shows that per capita expenditure in 2016 is lower than estimated in the 2015 study.

- Over the period to 2031, the scale of forecast expenditure growth is lower than previously forecast. While growth is still forecast for comparison retail and leisure spending, per capita convenience retail spending growth is static.
- SFT is expected to play a more significant role in comparison spending going forward than previously anticipated. Non-store convenience spending forecasts are largely unchanged.
- The ability of existing comparison floorspace to absorb more expenditure (efficiency) has improved since the 2015 study. Conversely, we do not expect any change in convenience sales densities.
- More expenditure is already 'committed' because of permissions granted since the 2015 study.

2.25 The net effects of these changes are that the pot of available expenditure in the study area will be less than forecast in the 2015 study.

- For comparison goods, this is because population growth is lower, as is per capita spending in the base year, the rate of growth of that spending over the period to 2031 and because a greater proportion of spending will not be transacted through traditional floorspace (SFT).
- In relation to convenience goods, because per capita spending across the study period will be static, any additional convenience spending is derived from population growth. Because population growth is more limited than projected in the 2015 study, this means that there is a reduced pot of convenience expenditure available.
- Leisure spending has been reduced by lower population and population growth, as well as more conservative forecasts on the scale of leisure growth over the study period.

3 UPDATED CAPACITY FORECASTS

3.1 In this section, we set out our revised forecasts for retail and leisure capacity over the period to 2031. We emphasise that capacity forecasts should be subject to regular review throughout the Council's plan period, to ensure an up-to-date evidence base based on accurate economic and market trends. We also advise that long-term quantitative forecasts (post-2026) should be treated as indicative and should, in line with the PPG, be reviewed within the next three to five years.

3.2 This section should be read alongside:

- Appendix B: updated quantitative comparison and convenience tables
- Appendix C: updated leisure tables

Comparison goods capacity

3.3 The revised comparison capacity forecasts are set out in Table A6-9 (Appendix B). The table below summarises the comparison capacity forecasts under the two scenarios (constant market share and increasing retention); for ease of reference, the figures are presented on a cumulative basis.

Table 3.1 Quantitative comparison floorspace needs

	2017	2021	2026	2029	2031
Baseline requirement					
Net sqm	-3,724	-3,345	8,179	15,303	20,722
Gross sqm	-5,321	-4,779	11,684	21,861	29,603
Increasing retention					
Net sqm	-3,724	652	12,650	24,452	30,299
Gross sqm	-5,321	932	18,072	34,931	43,284

Source: Appendix B (Tables A8 and A9)

3.4 As set out in Section 2, the above is based on a base level sales efficiency of 2% per annum. We also undertook a sensitivity which tested a higher floorspace efficiency of 2.5%. The implications for comparison floorspace needs are set out in the table below.

Table 3.2 Quantitative comparison floorspace needs – higher sales efficiency sensitivity

	2017	2021	2026	2029	2031
Baseline requirement					
Net sqm	-5,089	-6,606	1,993	7,121	11,061
Gross sqm	-7,270	-9,437	2,848	10,173	15,801

	2017	2021	2026	2029	2031
Increasing retention					
Net sqm	-5,089	-2,743	6,210	15,623	19,874
Gross sqm	-7,270	-3,919	8,872	22,319	28,391

Source: Appendix B (Tables A8 and A9)

3.5 These figures, in our main case and the sensitivity, and for the two different retention scenarios, represent a reduction from the findings of the 2015 study. That study had identified net floorspace need of 49,546 sqm in the constant market share scenario, or of 61,946 sqm under the increased retention scenario. The reasons for the reduction are summarised at the end of Section 2.

Convenience floorspace capacity

3.6 The revised convenience capacity forecasts are set out in Table B7 (Appendix B). The table below summarises the convenience capacity forecasts; for ease of reference, the figures are presented on a cumulative basis.

Table 3.3 Quantitative convenience floorspace needs

	2017	2021	2026	2029	2031
Net sqm	8,235	5,822	8,299	9,829	10,851
Gross sqm	12,669	8,957	12,767	15,121	16,694

Source: Appendix B (Table B7)

3.7 This shows some convenience need over the study period. This is expected to reduce somewhat in the period to 2021 as the various convenience commitments are built out. However, it is worth noting that all the capacity identified is primarily because of quantitative overtrading in the base year in the order £100m.

3.8 These figures represent a reduction from the findings of the 2015 study which identified a net need of 13,177 sqm by 2031. Again, the reasons for the reduction are set out in Section 2. It is worth noting that the reduction in need would have been greater had the Morrisons commitment not fallen away so reducing the claims on convenience expenditure.

A3-5 leisure capacity

3.9 The revised capacity forecasts are set out in Table C6 (Appendix C). The table below summarises the A3, A4 and A5 floorspace capacity forecasts; for ease of reference, the figures are presented on a cumulative basis.

Table 3.4 Quantitative A3-5 floorspace needs

	2017	2021	2026	2029	2031
Gross sqm	14	2,426	6,403	8,921	10,619

Source: Appendix C (Table C6)

3.10 The 2015 study identified more capacity at 15,145 sqm gross by 2031. The reasons for this reduction include the slower rate of leisure expenditure growth and the lower study area population growth.

4 CONCLUSIONS AND RECOMMENDATIONS

4.1 In this section, we revisit the quantitative recommendations of the 2015 study in view of the findings set out above. It should be stressed that there is a degree of uncertainty with longer-term forecasts and so any figures after 2026 should be treated with some caution.

4.2 The updated quantitative assessment has identified reduced comparison retail, convenience retail and leisure needs in the period to 2031.

Comparison goods needs

4.3 For consistency with the 2015 study, we have examined both a constant market share main case and an increased retention scenario. However, the rationale which informed the 2015 study's recommendation that the Council should plan based on the constant market share remains i.e. because of the level of competition in the area, it is not realistic to increase retention in Havering, this section focuses on the quantitative capacity findings identified in this main case.

4.4 The 2015 study set out several ways in which the Council could meet the identified quantitative needs. This included the existing stock servicing a share of additional turnover by trading more efficiently. This quantitative update explored this as a sensitivity which assumed a higher trading efficiency of 2.5% per annum. The table below shows the capacity implications of the existing stock absorbing a greater proportion of identified spending growth i.e. halving quantitative need by 2031. Whichever level of sales efficiency is applied; the comparison need is substantially reduced from the 49,500 sqm net identified in the 2015 study, and there is no need in the immediate term.

Table 4.1 Comparison goods floorspace needs in Havering (constant market share) – base and higher sales efficiency

Net sqm	2017	2021	2026	2029	2031
Base efficiency (2% pa)	-3,720	-3,350	8,180	15,300	20,720
Higher efficiency (2.5%)	-5,090	-6,610	1,990	7,120	11,060

Source: Appendix B (rounded to nearest 10)

4.5 The 2015 study acknowledged that 'there is scope, under certain conditions, for existing floorspace to improve its turnover beyond this allowance'. These conditions relate the quality of existing floorspace and the likelihood of qualitative interventions which might improve the quality of floorspace, and so increase the potential of the existing stock to trade more efficiently.

4.6 Given the stock of retail floorspace is hugely varied, so too is the ability to deliver improvements. However, these efficiencies are lower than the trend level of over 3%

per annum identified in London by Experian in their October 2017 study[10] at a London-wide level where plainly such variations also exist.

4.7 In the case of Romford, some investment in the quality of stock is already anticipated with the improvements to the Liberty Shopping Centre. The scope then for Romford town centre and other centres to improve the performance of its existing stock over time relies on this sort of investment happening so that floorspace is modern and the quality of the environment is such that people prolong the time, and increase the money, spent within existing town centres.

4.8 Monitoring such investment is more challenging than simply monitoring planning permissions; but methods could involve tracking vacant premises as they are reoccupied and regular liaison with key town centre stakeholders, particularly in Romford as the main centre, to understand forthcoming investment. It will be important to do so, especially in Romford where it remains the recommended location for meeting comparison needs, to ensure sufficient provision is being made to meet quantitative needs within the borough. If not, it would follow that Havering's market share would reduce i.e. the third approach to meeting need set out in the 2015 study.

4.9 Given this challenge, it is recommended that the base level of efficiency is adopted and policy makes provision to meet 15,300 sqm net over the period to 2026 but that the Council consider safeguarding land to meet needs thereafter (having regard to the uncertainty over longer-term forecasts). If monitoring indicates that qualitative improvements are coming forward and that floorspace is being used more in line with the higher rate of efficiency growth, the safeguarded sites could be reviewed in future iterations of the plan to understand whether they are still needed.

Convenience goods needs

4.10 In convenience terms, the scale of quantitative need identified is broadly comparable to that identified in the 2015 study. This update identifies need of 8,300 sqm net by 2026, increasing to 10,850 sqm net by 2031. This compares to 13,200 sqm net capacity by 2031 set out in the 2015 study.

4.11 It remains the case that it is overtrading in the existing provision that is driving capacity. In terms of meeting those needs, the recommendations of the 2015 study hold true: allowing a smaller number of foodstore developments, including as part of mixed-use schemes, in sequentially preferable locations across the borough.

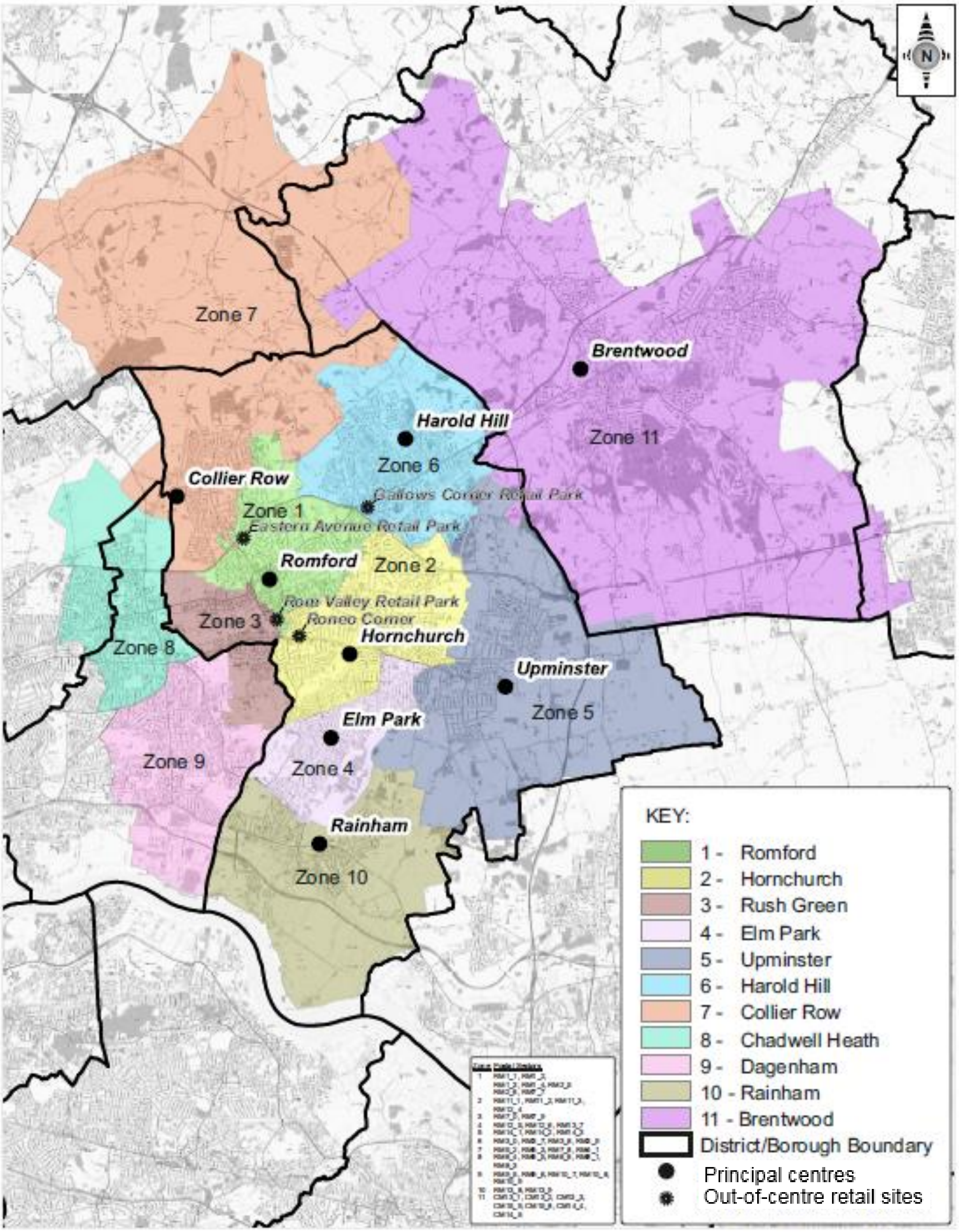
Leisure needs

4.12 Lower levels of quantitative need than in the 2015 study have been identified in this update for commercial A3, A4 and A5 uses: 8,920 sqm gross by 2026, increasing to 10,620 sqm gross by 2031.

[1010] Experian (October 2017): Consumer expenditure and comparison goods floorspace need in London (Figure 37)

4.13 Accommodating this need should be considered alongside the qualitative factors that were outlined in the 2015 study's vision for the network of centres. The update study does not revisit those recommendations, but in relation to the principles for how such leisure space might come forward in those centres, this update validates the approach recommended in the 2015 study. Namely that the need for specific allocation is reduced by the fact that most floorspace will come forward through conversion of existing premises or bringing previously vacant units back into use. Where new space is proposed, it should be subject to sequential testing and could form part of mixed-use residential or other commercial-led developments.

APPENDIX A HOUSEHOLD SURVEY AREA



APPENDIX B QUANTITATIVE RETAIL CAPACITY

Table A1
Population projections

	2016	2017	2021	2026	2029	2031	Change, 2016-31
Zone 1	40,208	40,677	42,842	45,760	47,434	48,525	8,317
Zone 2	49,115	49,663	51,955	54,854	56,627	57,731	8,616
Zone 3	19,109	19,423	20,741	22,319	23,236	23,852	4,743
Zone 4	28,904	29,189	30,428	31,971	32,886	33,503	4,599
Zone 5	27,687	27,951	29,102	30,435	31,217	31,718	4,031
Zone 6	43,969	44,504	46,858	49,963	51,797	52,998	9,029
Zone 7	31,390	31,793	33,293	35,280	36,380	37,141	5,751
Zone 8	59,989	61,065	65,220	69,934	72,492	74,138	14,149
Zone 9	64,193	65,376	69,861	74,602	77,066	78,593	14,400
Zone 10	21,233	21,504	22,696	24,265	25,235	25,863	4,630
Zone 11	61,798	62,344	64,762	67,859	69,751	70,993	9,195
Total	**447,595**	**453,489**	**477,758**	**507,242**	**524,121**	**535,055**	**87,460**

Notes
Source: Experian MMG3 (2017) for base year and population projections (derived from ONS 2014-based subnational population projections).

Table A2
Per capita expenditure on comparison goods exc. SFT

	2016	2017	2021	2026	2029	2031
	£	£	£	£	£	£
Zone 1	3,184	3,210	3,426	3,991	4,370	4,663
Zone 2	3,489	3,516	3,754	4,373	4,787	5,109
Zone 3	2,776	2,798	2,987	3,479	3,809	4,065
Zone 4	3,053	3,077	3,285	3,826	4,189	4,470
Zone 5	3,600	3,629	3,874	4,512	4,941	5,272
Zone 6	2,494	2,514	2,683	3,126	3,422	3,652
Zone 7	3,040	3,064	3,271	3,810	4,171	4,451
Zone 8	2,198	2,216	2,365	2,755	3,016	3,219
Zone 9	2,057	2,073	2,213	2,578	2,823	3,012
Zone 10	2,856	2,879	3,073	3,580	3,920	4,183
Zone 11	3,575	3,604	3,847	4,481	4,906	5,235

Notes
Source: Experian MMG3 (2017 data in 2016 prices).
SFT excluded in the base year (2016) based on Experian Retail Planner Briefing Note 15 Figure 5
Expenditure growth rates (exc. SFT) applied derived from Experian Retail Planner Briefing Note 15 Figure 6
All monetary values held constant at 2016 prices.

Table A3
Total comparison goods expenditure

	2016	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	£128.02	£130.55	£146.78	£182.63	£207.26	£226.26
Zone 2	£171.34	£174.64	£195.02	£239.86	£271.09	£294.92
Zone 3	£53.04	£54.35	£61.95	£77.65	£88.51	£96.95
Zone 4	£88.23	£89.81	£99.94	£122.33	£137.76	£149.76
Zone 5	£99.68	£101.43	£112.73	£137.34	£154.23	£167.22
Zone 6	£109.65	£111.87	£125.73	£156.17	£177.26	£193.54
Zone 7	£95.41	£97.41	£108.89	£134.41	£151.75	£165.32
Zone 8	£131.85	£135.29	£154.24	£192.67	£218.66	£238.62
Zone 9	£132.04	£135.55	£154.62	£192.34	£217.54	£236.74
Zone 10	£60.65	£61.91	£69.75	£86.87	£98.91	£108.17
Zone 11	£220.93	£224.67	£249.12	£304.08	£342.20	£371.66
Total	**£1,290.85**	**£1,317.49**	**£1,478.78**	**£1,826.35**	**£2,065.19**	**£2,249.17**

Notes
Source: Table A1, Table A2
All monetary values are held constant at 2016 prices.

Table A4

Comparison goods market shares 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %
Zone 1											
Romford town centre	60.01%	31.22%	55.69%	28.47%	10.81%	39.27%	51.21%	44.86%	29.22%	15.69%	6.70%
Gallows Corner Retail Park, Romford	5.59%	5.33%	4.84%	1.87%	2.00%	16.04%	10.05%	1.73%	1.45%	0.34%	3.66%
Eastern Avenue Retail Park, Romford	3.91%	6.80%	6.71%	1.51%	0.66%	2.89%	11.48%	1.99%	0.87%	0.00%	0.36%
Other retail parks, Romford	2.01%	4.43%	7.04%	5.00%	1.28%	1.07%	2.15%	4.95%	1.09%	1.07%	0.63%
Other locations, zone 1	0.90%	0.71%	0.00%	0.85%	0.68%	0.78%	2.16%	0.00%	0.00%	0.18%	0.00%
Sub-total, survey zone 1	**72.42%**	**48.48%**	**74.28%**	**37.70%**	**15.44%**	**60.04%**	**77.05%**	**53.52%**	**32.63%**	**17.28%**	**11.35%**
Zone 2											
Hornchurch	1.86%	8.07%	1.12%	9.51%	4.20%	1.82%	0.82%	0.15%	0.10%	1.79%	0.48%
Other locations, zone 2	1.70%	2.33%	2.20%	1.60%	1.79%	2.67%	1.48%	0.82%	0.28%	0.34%	1.09%
Sub-total, survey zone 2	**3.56%**	**10.40%**	**3.32%**	**11.12%**	**5.98%**	**4.49%**	**2.30%**	**0.98%**	**0.38%**	**2.13%**	**1.56%**
Zone 3											
All locations, zone 3	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.45%	0.67%	0.00%	0.00%
Sub-total, survey zone 3	**0.00%**	**0.00%**	**0.31%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.45%**	**0.67%**	**0.00%**	**0.00%**
Zone 4											
Elm Park	0.00%	0.27%	0.00%	2.36%	0.12%	0.00%	0.00%	0.25%	0.00%	0.09%	0.00%
Other locations, zone 4	0.00%	0.04%	0.00%	0.96%	0.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 4	**0.00%**	**0.31%**	**0.00%**	**3.32%**	**0.35%**	**0.00%**	**0.00%**	**0.25%**	**0.00%**	**0.09%**	**0.00%**
Zone 5											
Upminster	1.89%	0.90%	0.56%	2.78%	15.08%	2.00%	1.17%	0.53%	0.11%	0.93%	1.37%
Other locations, zone 5	0.00%	0.00%	0.00%	0.00%	0.74%	0.17%	0.00%	0.00%	0.36%	0.00%	0.00%
Sub-total, survey zone 5	**1.89%**	**0.90%**	**0.56%**	**2.78%**	**15.82%**	**2.17%**	**1.17%**	**0.53%**	**0.47%**	**0.93%**	**1.37%**
Zone 6											
Harold Hill	0.05%	0.25%	0.06%	0.03%	0.35%	3.18%	1.16%	0.00%	0.23%	0.03%	0.03%
Tesco Extra, Bryant Avenue, Romford	4.73%	0.92%	0.63%	0.16%	0.13%	3.06%	3.12%	0.11%	0.00%	0.00%	0.17%
Other locations, zone 6	0.00%	0.00%	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%	0.26%
Sub-total, survey zone 6	**4.78%**	**1.16%**	**0.70%**	**0.19%**	**0.48%**	**7.18%**	**4.27%**	**0.11%**	**0.23%**	**0.03%**	**0.46%**
Zone 7											
(No centres)											
Zone 8											
Goodmayes (inc. Tesco Extra, retail parks)	0.02%	0.84%	0.37%	0.06%	0.00%	0.15%	0.12%	6.35%	0.72%	0.00%	0.00%
Other locations, zone 8	0.68%	0.55%	1.67%	0.25%	0.00%	0.00%	0.72%	6.67%	2.39%	0.00%	0.00%
Sub-total, survey zone 8	**0.70%**	**1.39%**	**2.04%**	**0.31%**	**0.00%**	**0.15%**	**0.85%**	**13.02%**	**3.11%**	**0.00%**	**0.00%**
Zone 9											
Dagenham	0.15%	0.05%	2.31%	2.25%	0.00%	0.28%	0.00%	4.95%	24.43%	2.03%	0.00%
Other locations, zone 9	0.00%	0.01%	0.01%	0.10%	0.00%	0.00%	0.00%	0.04%	0.68%	0.00%	0.00%
Sub-total, survey zone 9	**0.15%**	**0.06%**	**2.32%**	**2.35%**	**0.00%**	**0.28%**	**0.00%**	**5.00%**	**25.12%**	**2.03%**	**0.00%**
Zone 10											
Rainham (inc. Tesco Extra)	0.00%	0.07%	0.01%	3.97%	1.04%	0.49%	0.00%	0.16%	0.62%	16.20%	0.26%
Sub-total, survey zone 10	**0.00%**	**0.07%**	**0.01%**	**3.97%**	**1.04%**	**0.49%**	**0.00%**	**0.16%**	**0.62%**	**16.20%**	**0.26%**
Zone 11											
Brentwood	0.66%	0.03%	0.23%	0.11%	1.61%	1.88%	0.00%	0.51%	0.00%	0.08%	38.38%
Other locations, zone 11	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.84%
Sub-total, survey zone 11	**0.66%**	**0.03%**	**0.23%**	**0.11%**	**1.61%**	**1.88%**	**0.00%**	**0.51%**	**0.00%**	**0.08%**	**40.22%**
Total for survey area	**84.16%**	**62.81%**	**83.76%**	**61.84%**	**40.73%**	**76.69%**	**85.65%**	**74.52%**	**63.24%**	**38.77%**	**55.22%**
Outside survey area											
Lakeside	9.51%	26.63%	10.36%	30.09%	49.09%	15.93%	7.92%	8.23%	23.64%	57.58%	18.74%
Central London / West End	1.56%	3.26%	0.53%	3.02%	1.87%	1.50%	1.63%	3.92%	1.58%	0.82%	0.42%
Basildon	0.00%	0.00%	0.28%	0.87%	0.51%	0.05%	0.25%	0.33%	0.06%	0.00%	11.77%
Stratford (incl Westfield Stratford City)	1.31%	0.61%	0.67%	0.94%	1.12%	1.66%	0.41%	3.25%	1.43%	0.27%	2.98%
Bluewater	0.18%	2.65%	1.41%	0.71%	4.70%	1.38%	0.92%	0.00%	0.57%	0.14%	2.87%
Ilford	0.46%	1.28%	1.05%	0.48%	0.40%	0.12%	1.97%	7.86%	1.65%	0.51%	0.00%
Chelmsford	0.32%	0.00%	0.18%	0.00%	0.00%	1.71%	0.00%	0.00%	0.00%	0.00%	4.95%
Beckton (superstores/ retail parks)	0.00%	0.93%	0.27%	0.72%	0.00%	0.37%	0.00%	0.73%	3.03%	0.11%	0.00%
Barking	0.03%	0.00%	0.00%	1.07%	0.00%	0.05%	0.00%	0.16%	0.66%	0.26%	0.00%
Other locations outside survey area	2.48%	1.82%	1.50%	0.26%	1.59%	0.53%	1.25%	1.00%	4.15%	1.55%	3.07%
Total for outside survey area	**15.84%**	**37.19%**	**16.24%**	**38.16%**	**59.27%**	**23.31%**	**14.35%**	**25.48%**	**36.76%**	**61.23%**	**44.78%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, August 2014

Table A5

Comparison goods spending 2016

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Total £m
Total available comparison goods expenditure	*128.02*	*171.34*	*53.04*	*88.23*	*99.68*	*109.65*	*95.41*	*131.85*	*132.04*	*60.65*	*220.93*	*1,290.85*
Zone 1												
Romford town centre	76.83	53.49	29.54	25.12	10.78	43.06	48.86	59.15	38.58	9.51	14.81	409.72
Gallows Corner Retail Park, Romford	7.15	9.13	2.56	1.65	2.00	17.59	9.59	2.28	1.92	0.21	8.09	62.17
Eastern Avenue Retail Park, Romford	5.01	11.66	3.56	1.33	0.66	3.17	10.95	2.62	1.15	0.00	0.80	40.89
Other retail parks, Romford	2.57	7.59	3.73	4.41	1.28	1.17	2.05	6.52	1.43	0.65	1.39	32.80
Other locations, zone 1	1.16	1.21	0.00	0.75	0.68	0.86	2.06	0.00	0.00	0.11	0.00	6.83
Sub-total, survey zone 1	**92.72**	**83.07**	**39.40**	**33.26**	**15.39**	**65.84**	**73.52**	**70.56**	**43.09**	**10.48**	**25.08**	**552.41**
Zone 2												
Hornchurch	2.38	13.83	0.60	8.40	4.18	2.00	0.78	0.20	0.13	1.09	1.05	34.64
Other locations, zone 2	2.18	3.99	1.17	1.41	1.78	2.93	1.41	1.08	0.37	0.21	2.40	18.94
Sub-total, survey zone 2	**4.56**	**17.82**	**1.76**	**9.81**	**5.96**	**4.93**	**2.20**	**1.29**	**0.51**	**1.29**	**3.45**	**53.58**
Zone 3												
All locations, zone 3	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.59	0.89	0.00	0.00	1.65
Sub-total, survey zone 3	**0.00**	**0.00**	**0.17**	**0.00**	**0.00**	**0.00**	**0.00**	**0.59**	**0.89**	**0.00**	**0.00**	**1.65**
Zone 4												
Elm Park	0.00	0.46	0.00	2.08	0.12	0.00	0.00	0.34	0.00	0.05	0.00	3.05
Other locations, zone 4	0.00	0.07	0.00	0.85	0.23	0.00	0.00	0.00	0.00	0.00	0.00	1.15
Sub-total, survey zone 4	**0.00**	**0.53**	**0.00**	**2.93**	**0.35**	**0.00**	**0.00**	**0.34**	**0.00**	**0.05**	**0.00**	**4.20**
Zone 5												
Upminster	2.42	1.54	0.30	2.45	15.03	2.20	1.12	0.70	0.14	0.56	3.02	29.48
All locations, zone 5	0.00	0.00	0.00	0.00	0.74	0.19	0.00	0.00	0.48	0.00	0.00	1.40
Sub-total, survey zone 5	**2.42**	**1.54**	**0.30**	**2.45**	**15.77**	**2.38**	**1.12**	**0.70**	**0.62**	**0.56**	**3.02**	**30.88**
Zone 6												
Harold Hill	0.07	0.43	0.03	0.03	0.35	3.49	1.11	0.00	0.30	0.02	0.06	5.87
Tesco Extra, Bryant Avenue, Romford	6.05	1.57	0.34	0.14	0.13	3.36	2.97	0.15	0.00	0.00	0.38	15.08
Other locations, zone 6	0.00	0.00	0.00	0.00	0.00	1.02	0.00	0.00	0.00	0.00	0.58	1.60
Sub-total, survey zone 6	**6.12**	**1.99**	**0.37**	**0.17**	**0.48**	**7.87**	**4.08**	**0.15**	**0.30**	**0.02**	**1.01**	**22.56**
Zone 7												
(No centres)												
Zone 8												
Goodmayes (incl Tesco Extra, retail parks)	0.02	1.44	0.20	0.06	0.00	0.16	0.12	8.37	0.95	0.00	0.00	11.31
Other locations, zone 8	0.88	0.94	0.88	0.22	0.00	0.00	0.69	8.79	3.16	0.00	0.00	15.56
Sub-total, survey zone 8	**0.90**	**2.38**	**1.08**	**0.28**	**0.00**	**0.16**	**0.81**	**17.16**	**4.10**	**0.00**	**0.00**	**26.87**
Zone 9												
Dagenham	0.19	0.08	1.22	1.99	0.00	0.31	0.00	6.53	32.26	1.23	0.00	43.82
Other locations, zone 9	0.00	0.02	0.00	0.09	0.00	0.00	0.00	0.06	0.90	0.00	0.00	1.08
Sub-total, survey zone 9	**0.19**	**0.10**	**1.23**	**2.08**	**0.00**	**0.31**	**0.00**	**6.59**	**33.17**	**1.23**	**0.00**	**44.90**
Zone 10												
Rainham (incl. Tesco Extra)	0.00	0.13	0.00	3.50	1.04	0.54	0.00	0.21	0.83	9.83	0.57	16.64
Sub-total, survey zone 10	**0.00**	**0.13**	**0.00**	**3.50**	**1.04**	**0.54**	**0.00**	**0.21**	**0.83**	**9.83**	**0.57**	**16.64**
Zone 11												
Brentwood	0.85	0.05	0.12	0.09	1.61	2.06	0.00	0.67	0.00	0.05	84.79	90.29
Other locations, zone 11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.06	4.06
Sub-total, survey zone 11	**0.85**	**0.05**	**0.12**	**0.09**	**1.61**	**2.06**	**0.00**	**0.67**	**0.00**	**0.05**	**88.85**	**94.35**
Total for survey area	**107.75**	**107.62**	**44.43**	**54.56**	**40.59**	**84.09**	**81.72**	**98.26**	**83.50**	**23.51**	**121.99**	**848.03**
Outside survey area												
Lakeside	12.17	45.63	5.49	26.55	48.93	17.47	7.56	10.85	31.22	34.92	41.39	282.19
Central London / West End	2.00	5.58	0.28	2.67	1.86	1.65	1.55	5.16	2.09	0.50	0.93	24.27
Basildon	0.00	0.00	0.15	0.77	0.51	0.05	0.24	0.43	0.08	0.00	26.00	28.23
Stratford (incl Westfield Stratford City)	1.68	1.05	0.35	0.83	1.11	1.82	0.39	4.29	1.88	0.16	6.58	20.15
Bluewater	0.23	4.54	0.75	0.63	4.68	1.51	0.87	0.00	0.75	0.09	6.33	20.38
Ilford	0.59	2.19	0.55	0.42	0.40	0.14	1.88	10.36	2.18	0.31	0.00	19.01
Chelmsford	0.40	0.00	0.09	0.00	0.00	1.88	0.00	0.00	0.00	0.00	10.93	13.31
Beckton (superstores/ retail parks)	0.00	1.60	0.14	0.63	0.00	0.41	0.00	0.97	4.00	0.07	0.00	7.82
Barking	0.03	0.00	0.00	0.94	0.00	0.05	0.00	0.21	0.87	0.16	0.00	2.26
Other locations outside survey area	3.17	3.12	0.80	0.23	1.58	0.58	1.20	1.31	5.48	0.94	6.78	25.19
Total for outside survey area	**20.27**	**63.72**	**8.61**	**33.67**	**59.08**	**25.55**	**13.70**	**33.59**	**48.54**	**37.14**	**98.94**	**442.82**
Overall total	**128.02**	**171.34**	**53.04**	**88.23**	**99.68**	**109.65**	**95.41**	**131.85**	**132.04**	**60.65**	**220.93**	**1290.85**

Notes
Source: Table A3, A4. All monetary values held constant at 2016 prices.
All monetary values held constant at 2016 prices.

Table A6

Comparison goods floorspace requirements to 2031

Baseline requirement

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	447,595	453,489	477,758	507,242	524,121	535,055
B	Total comparison goods expenditure (£m)	1,290.85	1,317.49	1,478.78	1,826.35	2,065.19	2,249.17
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	53%	53%	53%	53%	53%	53%
D	Retained comparison goods expenditure in LB Havering (£m)	681.91	695.98	781.18	964.80	1090.97	1188.16
E	Comparison goods expenditure leakage (£m)	608.94	621.51	697.59	861.56	974.23	1,061.02
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	681.91	681.91	681.91	681.91	681.91	681.91
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	14.07	99.27	282.88	409.06	506.25
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	41.74	101.39	182.92	235.85	272.93
K	Comparison goods commitments (£m)	0.00	0.00	24.78	27.36	29.03	30.21
L	Total claims on capacity	0.00	41.74	126.17	210.28	264.89	303.14
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	14.07	99.27	282.88	409.06	506.25
N	Total claims on capacity (£m)	0.00	41.74	126.17	210.28	264.89	303.14
O	Residual comparison goods expenditure (£m)	0.00	-27.67	-26.90	72.61	144.17	203.11
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,428	8,041	8,878	9,421	9,802
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**-3,724**	**-3,345**	**8,179**	**15,303**	**20,722**
R	Comparison goods floorspace need (sq.m gross)	0	-5,321	-4,779	11,684	21,861	29,603

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 2% per annum applied (Source: Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian on behalf of the the GLA, October 2017 - base scenario)
Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2016 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Angel Way, Romford	5.66	6.13	6.76	7.18	7.47
Aldi Collier Row	1.39	1.50	1.66	1.76	1.83
Lidl Hornchurch	1.57	1.70	1.87	1.99	2.07
Lidl Gooshays Drive	1.26	1.37	1.51	1.60	1.67
Liberty Shopping Centre extension	13.02	14.09	15.55	16.51	17.17
Total	*22.89*	*24.78*	*27.36*	*29.03*	*30.21*

*Base turnover is turnover at 2017, in 2016 prices. It is assumed the commitments will commence trading between 2017 and 2021.

Table A7

Comparison goods floorspace requirements to 2031

Increasing retention requirement

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	447,595	453,489	477,758	507,242	524,121	535,055
B	Total comparison goods expenditure (£m)	1,290.85	1,317.49	1,478.78	1,826.35	2,065.19	2,249.17
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	53%	53%	55%	55%	57%	57%
D	Retained comparison goods expenditure in LB Havering (£m)	681.91	695.98201	813.32638	1004.4934	1177.1601	1282.0283
E	Comparison goods expenditure leakage (£m)	608.94	621.51	665.45	821.86	888.03	967.14
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	681.91	681.91	681.91	681.91	681.91	681.91
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	14.07	131.42	322.58	495.25	600.12
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	41.74	101.39	182.92	235.85	272.93
K	Comparison goods commitments (£m)	0.00	0.00	24.78	27.36	29.03	30.21
L	Total claims on capacity	0.00	41.74	126.17	210.28	264.89	303.14
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	14.07	131.42	322.58	495.25	600.12
N	Total claims on capacity (£m)	0.00	41.74	126.17	210.28	264.89	303.14
O	Residual comparison goods expenditure (£m)	0.00	-27.67	5.24	112.31	230.36	296.98
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,428	8,041	8,878	9,421	9,802
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**-3,724**	**652**	**12,650**	**24,452**	**30,299**
R	Comparison goods floorspace need (sq.m gross)	0	-5,321	932	18,072	34,931	43,284

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 2% per annum applied (Source: Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian on behalf of the the GLA, October 2017 - base scenario)
Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2016 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Angel Way, Romford	5.66	6.13	6.76	7.18	7.47
Aldi Collier Row	1.39	1.50	1.66	1.76	1.83
Lidl Hornchurch	1.57	1.70	1.87	1.99	2.07
Lidl Gooshays Drive	1.26	1.37	1.51	1.60	1.67
Liberty Shopping Centre extension	13.02	14.09	15.55	16.51	17.17
Total	*22.89*	*10.69*	*11.80*	*12.53*	*13.03*

*Base turnover is turnover at 2017, in 2016 prices. It is assumed the commitments will commence trading between 2017 and 2021.

Table A8

Comparison goods floorspace requirements to 2031

Baseline requirement

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	447,595	453,489	477,758	507,242	524,121	535,055
B	Total comparison goods expenditure (£m)	1,290.85	1,317.49	1,478.78	1,826.35	2,065.19	2,249.17
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	53%	53%	53%	53%	53%	53%
D	Retained comparison goods expenditure in LB Havering (£m)	681.91	695.98	781.18	964.80	1090.97	1188.16
E	Comparison goods expenditure leakage (£m)	608.94	621.51	697.59	861.56	974.23	1,061.02
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	681.91	681.91	681.91	681.91	681.91	681.91
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	14.07	99.27	282.88	409.06	506.25
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	52.43	128.67	235.18	305.70	355.70
K	Comparison goods commitments (£m)	0.00	0.00	25.57	28.94	31.16	32.74
L	Total claims on capacity	0.00	52.43	154.24	264.12	336.86	388.43
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	14.07	99.27	282.88	409.06	506.25
N	Total claims on capacity (£m)	0.00	52.43	154.24	264.12	336.86	388.43
O	Residual comparison goods expenditure (£m)	0.00	-38.36	-54.97	18.77	72.20	117.81
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,538	8,321	9,414	10,138	10,651
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**-5,089**	**-6,606**	**1,993**	**7,121**	**11,061**
R	Comparison goods floorspace need (sq.m gross)	0	-7,270	-9,437	2,848	10,173	15,801

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 2.5% per annum applied (Source: Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian on behalf of the the GLA, October 2017 - base scenario)
Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2016 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Angel Way, Romford	5.74	6.34	7.17	7.73	8.12
Aldi Collier Row	1.39	1.53	1.73	1.86	1.96
Lidl Hornchurch	1.57	1.73	1.96	2.11	2.22
Lidl Gooshays Drive	1.26	1.39	1.58	1.70	1.78
Liberty Shopping Centre extension	13.21	14.58	16.49	17.76	18.66
Total	*23.17*	*25.57*	*28.94*	*31.16*	*32.74*

*Base turnover is turnover at 2017, in 2016 prices. It is assumed the commitments will commence trading between 2017 and 2021.

Havering Retail & Commercial Leisure Needs Assessment
Peter Brett Associates for London Borough of Havering

Table A9

Comparison goods floorspace requirements to 2031

Increasing retention requirement

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	447,595	453,489	477,758	507,242	524,121	535,055
B	Total comparison goods expenditure (£m)	1,290.85	1,317.49	1,478.78	1,826.35	2,065.19	2,249.17
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	53%	53%	55%	55%	57%	57%
D	Retained comparison goods expenditure in LB Havering (£m)	681.91	695.98201	813.32638	1004.4934	1177.1601	1282.0283
E	Comparison goods expenditure leakage (£m)	608.94	621.51	665.45	821.86	888.03	967.14
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	681.91	681.91	681.91	681.91	681.91	681.91
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	14.07	131.42	322.58	495.25	600.12
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	52.43	128.67	235.18	305.70	355.70
K	Comparison goods commitments (£m)	0.00	0.00	25.57	28.94	31.16	32.74
L	Total claims on capacity	0.00	52.43	154.24	264.12	336.86	388.43
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	14.07	131.42	322.58	495.25	600.12
N	Total claims on capacity (£m)	0.00	52.43	154.24	264.12	336.86	388.43
O	Residual comparison goods expenditure (£m)	0.00	-38.36	-22.83	58.46	158.39	211.68
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,538	8,321	9,414	10,138	10,651
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**-5,089**	**-2,743**	**6,210**	**15,623**	**19,874**
R	Comparison goods floorspace need (sq.m gross)	0	-7,270	-3,919	8,872	22,319	28,391

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 2.5% per annum applied (Source: Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian on behalf of the the GLA, October 2017 - base scenario)
Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2016 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Angel Way, Romford	5.74	6.34	7.17	7.73	8.12
Aldi Collier Row	1.39	1.53	1.73	1.86	1.96
Lidl Hornchurch	1.57	1.73	1.96	2.11	2.22
Lidl Gooshays Drive	1.26	1.39	1.58	1.70	1.78
Liberty Shopping Centre extension	13.21	14.58	16.49	17.76	18.66
Total	*23.17*	*11.00*	*12.44*	*13.40*	*14.08*

*Base turnover is turnover at 2017, in 2016 prices. It is assumed the commitments will commence trading between 2017 and 2021.

Table B1
Population projections

	2016	2017	2021	2026	2029	2031	Change, 2016-31
Zone 1	40,208	40,677	42,842	45,760	47,434	48,525	8,317
Zone 2	49,115	49,663	51,955	54,854	56,627	57,731	8,616
Zone 3	19,109	19,423	20,741	22,319	23,236	23,852	4,743
Zone 4	28,904	29,189	30,428	31,971	32,886	33,503	4,599
Zone 5	27,687	27,951	29,102	30,435	31,217	31,718	4,031
Zone 6	43,969	44,504	46,858	49,963	51,797	52,998	9,029
Zone 7	31,390	31,793	33,293	35,280	36,380	37,141	5,751
Zone 8	59,989	61,065	65,220	69,934	72,492	74,138	14,149
Zone 9	64,193	65,376	69,861	74,602	77,066	78,593	14,400
Zone 10	21,233	21,504	22,696	24,265	25,235	25,863	4,630
Zone 11	61,798	62,344	64,762	67,859	69,751	70,993	9,195
Total	**447,595**	**453,489**	**477,758**	**507,242**	**524,121**	**535,055**	**87,460**

Notes
Source: Experian MMG3 (2017) for base year and population projections (derived from ONS 2014-based subnational population projections).

Table B2
Per capita expenditure on convenience goods exc. SFT

	2016	2017	2021	2026	2029	2031
Zone 1	2,004	1,998	1,972	1,960	1,958	1,958
Zone 2	2,120	2,113	2,086	2,073	2,071	2,071
Zone 3	1,851	1,845	1,821	1,810	1,809	1,809
Zone 4	2,004	1,998	1,972	1,960	1,958	1,958
Zone 5	2,197	2,191	2,162	2,149	2,147	2,147
Zone 6	1,862	1,857	1,833	1,822	1,820	1,820
Zone 7	2,026	2,020	1,994	1,982	1,980	1,980
Zone 8	1,720	1,714	1,692	1,682	1,680	1,680
Zone 9	1,758	1,753	1,730	1,720	1,718	1,718
Zone 10	1,911	1,905	1,880	1,869	1,867	1,867
Zone 11	2,184	2,177	2,149	2,136	2,134	2,134

Notes
Source: Experian MMG3 (2017 data in 2016 prices).
SFT excluded in the base year (2016) based on Experian Retail Planner Briefing Note 15 Figure 5
Expenditure growth rates (exc. SFT) applied derived from ERPBN15 Figure 6
All monetary values held constant at 2016 prices.

Table B3
Total convenience goods expenditure

	2016	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	£80.58	£81.28	£84.49	£89.71	£92.90	£95.03
Zone 2	£104.11	£104.95	£108.37	£113.74	£117.30	£119.58
Zone 3	£35.37	£35.84	£37.77	£40.41	£42.02	£43.14
Zone 4	£57.93	£58.32	£60.01	£62.68	£64.41	£65.61
Zone 5	£60.84	£61.23	£62.93	£65.42	£67.03	£68.11
Zone 6	£81.89	£82.63	£85.88	£91.02	£94.27	£96.45
Zone 7	£63.61	£64.23	£66.39	£69.93	£72.04	£73.55
Zone 8	£103.16	£104.69	£110.37	£117.64	£121.82	£124.58
Zone 9	£112.88	£114.62	£120.89	£128.32	£132.43	£135.05
Zone 10	£40.57	£40.97	£42.68	£45.36	£47.12	£48.30
Zone 11	£134.95	£135.74	£139.17	£144.96	£148.85	£151.50
Total	**£875.89**	**£884.52**	**£918.97**	**£969.17**	**£1,000.18**	**£1,020.91**

Notes
Source: Table B1, Table B2
All monetary values are held constant at 2016 prices.

Table B4

Convenience goods market shares 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %
Zone 1											
Romford town centre											
Asda, Dolphin Approach, Mercury Gardens	21.42%	8.78%	11.51%	3.47%	2.41%	5.90%	10.13%	4.24%	2.19%	1.92%	0.67%
Sainsbury's, The Brewery, Romford	15.60%	0.62%	16.47%	0.77%	1.29%	2.30%	7.87%	2.79%	0.00%	4.74%	0.00%
Marks & Spencer, South Street, Romford	6.61%	0.15%	2.73%	0.14%	0.00%	1.06%	2.42%	3.73%	0.31%	0.34%	0.00%
Aldi, Market Place, Romford	3.11%	0.59%	2.27%	0.15%	0.42%	3.54%	2.05%	1.76%	0.00%	0.68%	0.25%
Lidl, Atlanta Bvd, Romford	2.48%	0.39%	2.16%	0.58%	0.00%	0.27%	0.00%	0.08%	0.00%	0.00%	0.26%
Other stores, Romford town centre	2.42%	0.00%	0.87%	0.00%	0.00%	0.00%	0.66%	0.54%	0.00%	0.05%	0.00%
Sub-total, Romford town centre	**51.63%**	**10.53%**	**36.00%**	**5.11%**	**4.12%**	**13.06%**	**23.14%**	**13.14%**	**2.50%**	**7.73%**	**1.18%**
Other locations											
Aldi, Marlborough Road, Romford	4.46%	0.29%	1.67%	2.81%	0.00%	2.25%	22.22%	1.43%	0.00%	0.00%	1.99%
Gidea Park	0.72%	0.42%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, Romford / zone 1	7.65%	0.45%	3.83%	0.62%	0.00%	2.57%	3.16%	0.76%	0.90%	2.16%	0.00%
Sub-total, survey zone 1	**64.47%**	**11.70%**	**41.50%**	**8.54%**	**4.12%**	**17.89%**	**48.52%**	**15.32%**	**3.39%**	**9.89%**	**3.17%**
Zone 2											
Tesco Extra, Horchurch Road, Hornchurch	4.71%	29.22%	26.41%	5.07%	6.53%	0.11%	0.07%	1.68%	4.61%	4.33%	0.43%
Sainsbury's, High Street, Hornchurch	3.06%	26.97%	0.98%	14.80%	4.11%	0.82%	0.29%	0.00%	0.00%	2.90%	0.00%
Iceland, North Street, Hornchurch	0.00%	5.10%	0.00%	1.95%	0.00%	0.00%	0.00%	0.00%	0.00%	1.48%	0.00%
Other stores, Hornchurch	0.31%	4.34%	0.00%	3.91%	0.25%	0.00%	0.00%	0.00%	0.33%	0.26%	0.00%
Elm Park	0.00%	3.83%	0.00%	3.86%	1.67%	2.67%	0.00%	0.08%	0.00%	0.00%	0.00%
Other foodstores, zone 2	0.20%	0.25%	0.80%	0.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 2	**8.29%**	**69.72%**	**28.19%**	**30.44%**	**12.56%**	**3.59%**	**0.37%**	**1.76%**	**4.94%**	**8.97%**	**0.43%**
Zone 3											
Rush Green	0.00%	0.00%	4.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, zone 3	0.00%	0.00%	2.57%	0.00%	0.00%	0.00%	0.00%	0.00%	0.43%	0.00%	0.00%
Sub-total, survey zone 3	**0.00%**	**0.00%**	**7.10%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.43%**	**0.00%**	**0.00%**
Zone 4											
Tesco, Airfield Way, Elm Park	0.00%	1.46%	4.26%	20.88%	0.60%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%
Other foodstores, zone 4	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 4	**0.00%**	**1.46%**	**4.26%**	**20.88%**	**0.60%**	**0.00%**	**0.00%**	**0.00%**	**0.13%**	**0.00%**	**0.00%**
Zone 5											
Aldi, St Mary's Lane, Upminster	0.14%	4.09%	0.00%	5.54%	25.34%	2.01%	1.35%	0.00%	0.10%	0.83%	1.38%
Waitrose, St Mary's Lane, Upminster	0.69%	1.45%	0.49%	0.19%	14.81%	0.70%	0.00%	0.00%	0.29%	0.00%	0.65%
Marks & Spencer Simply Food, Station Road, Upminster	0.58%	0.51%	0.00%	0.44%	5.76%	1.44%	0.00%	0.00%	0.22%	0.39%	0.00%
Other foodstores, Upminster	0.00%	0.17%	0.00%	0.08%	6.59%	0.18%	0.00%	0.00%	0.00%	0.26%	0.08%
Other foodstores, zone 5	0.00%	0.00%	0.00%	0.00%	5.15%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 5	**1.42%**	**6.21%**	**0.49%**	**6.25%**	**57.64%**	**4.34%**	**1.35%**	**0.00%**	**0.61%**	**1.48%**	**2.12%**
Zone 6											
Tesco Extra, Bryant Avenue, Romford	17.20%	6.57%	6.38%	0.50%	8.49%	44.89%	17.00%	0.00%	0.00%	1.49%	7.29%
Iceland, Farnham Road, Harold Hill	1.68%	0.00%	0.00%	0.00%	0.00%	7.98%	0.37%	0.00%	0.00%	0.42%	0.00%
Sainsbury's Local, Farnham Road, Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	3.52%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Operative, Station Road, Harold Wood	0.00%	0.00%	0.00%	0.00%	0.00%	3.29%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, Harold Hill	0.00%	1.13%	0.00%	0.00%	0.00%	5.74%	0.43%	0.00%	0.00%	0.20%	0.00%
Other foodstores, zone 6	0.07%	0.00%	0.00%	0.00%	0.00%	1.38%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 6	**18.95%**	**7.70%**	**6.38%**	**0.50%**	**8.49%**	**66.79%**	**17.80%**	**0.00%**	**0.00%**	**2.11%**	**7.29%**
Zone 7											
Tesco Metro, Collier Row Lane, Collier Row	2.41%	0.00%	0.56%	0.00%	0.00%	1.28%	20.99%	0.59%	0.00%	0.00%	0.34%
Other foodstores, zone 7	0.29%	0.00%	0.00%	0.00%	0.00%	0.00%	5.40%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 7	**2.70%**	**0.00%**	**0.56%**	**0.00%**	**0.00%**	**1.28%**	**26.38%**	**0.59%**	**0.00%**	**0.00%**	**0.34%**
Zone 8											
Sainsbury's, High Road, Chadwell Heath	1.17%	0.00%	3.47%	0.50%	0.00%	0.00%	1.57%	22.62%	1.13%	0.23%	0.00%
Tesco Extra, High Road, Goodmayes	0.36%	0.00%	0.94%	0.00%	0.00%	0.00%	0.29%	15.73%	3.14%	0.00%	0.00%
Tesco Express, High Road, Chadwell Heath	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.76%	0.00%	0.00%	0.00%
Asda, Whalebone Lane, Chadwell Heath	0.00%	0.00%	1.43%	0.00%	0.00%	0.00%	0.00%	2.61%	0.88%	0.00%	0.00%
Other foodstores, zone 8	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.02%	1.90%	0.00%	0.00%
Sub-total, survey zone 8	**1.53%**	**0.00%**	**5.85%**	**0.50%**	**0.00%**	**0.00%**	**1.86%**	**47.73%**	**7.05%**	**0.23%**	**0.00%**
Zone 9											
Asda, Merrielands Crescent, Dagenham	0.00%	0.05%	0.49%	5.23%	0.09%	0.00%	1.22%	6.70%	34.57%	8.41%	1.17%
Morrisons, Wood Lane, Becontree Heath	0.05%	0.00%	2.43%	0.36%	0.00%	0.00%	0.00%	10.60%	7.82%	3.03%	0.00%
Iceland, Heathway, Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.41%	5.10%	0.00%	0.00%
Tesco Express, Heathway, Dagenham	0.00%	0.00%	0.00%	0.07%	0.00%	0.00%	0.00%	0.59%	4.58%	0.00%	0.00%
Lidl, Heathway, Dagenham	0.00%	0.00%	0.36%	0.46%	0.00%	0.00%	0.00%	0.41%	2.98%	0.35%	0.00%
Other foodstores, zone 9	0.00%	0.29%	0.75%	2.46%	0.08%	0.00%	0.00%	1.66%	7.29%	5.58%	0.00%
Sub-total, survey zone 9	**0.05%**	**0.35%**	**4.03%**	**8.59%**	**0.16%**	**0.00%**	**1.22%**	**20.36%**	**62.35%**	**17.37%**	**1.17%**
Zone 10											
Tesco Extra, Bridge Road, Rainham	0.00%	1.73%	0.64%	20.73%	2.89%	0.00%	0.00%	0.00%	5.45%	44.28%	0.00%
Tesco Express, Rainham Road, Rainham	0.00%	0.00%	0.00%	2.30%	0.81%	0.28%	0.00%	0.00%	0.89%	8.39%	0.00%
Other foodstores, zone 10	0.00%	0.00%	0.00%	0.28%	0.00%	0.00%	0.00%	0.00%	1.76%	0.00%	0.00%
Sub-total, survey zone 10	**0.00%**	**1.73%**	**0.64%**	**23.30%**	**3.70%**	**0.28%**	**0.00%**	**0.00%**	**8.10%**	**52.67%**	**0.00%**
Zone 11											
Sainsbury's, William Hunter Way, Brentwood	1.06%	0.00%	0.00%	0.00%	2.47%	1.58%	0.29%	0.00%	0.00%	0.00%	48.52%
Marks & Spencer, High Street, Brentwood	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.74%
Other foodstores, zone 11	0.41%	0.17%	0.00%	0.00%	0.00%	0.99%	0.00%	0.52%	0.00%	0.00%	19.50%
Sub-total, survey zone 11	**1.47%**	**0.17%**	**0.00%**	**0.00%**	**2.47%**	**2.57%**	**0.29%**	**0.52%**	**0.00%**	**0.00%**	**71.76%**
Total for study area	**98.88%**	**99.03%**	**98.99%**	**99.00%**	**89.75%**	**96.74%**	**97.80%**	**86.29%**	**86.99%**	**92.71%**	**86.28%**
Stores outside study area											
Ilford foodstores	0.00%	0.00%	0.00%	0.08%	0.08%	0.00%	0.78%	6.52%	0.99%	0.00%	0.00%
Lakeside / Grays / South Ockendon foodstores	0.00%	0.15%	0.00%	0.85%	7.40%	0.00%	0.00%	0.41%	0.30%	6.15%	0.40%
Barking foodstores	0.15%	0.00%	0.00%	0.00%	0.29%	0.00%	0.10%	0.00%	0.94%	0.00%	0.00%
Basildon foodstores	0.00%	0.00%	0.00%	0.00%	0.00%	0.28%	0.80%	0.00%	0.00%	0.00%	4.84%
Billericay foodstores	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.72%
Other foodstores outside study area	0.97%	0.82%	1.01%	0.07%	2.48%	2.98%	0.51%	6.78%	10.78%	1.14%	4.76%
Total for outside study area	**1.12%**	**0.97%**	**1.01%**	**1.00%**	**10.25%**	**3.26%**	**2.20%**	**13.71%**	**13.01%**	**7.29%**	**13.72%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, August 2014

Table B5

Convenience goods spending 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total available convenience goods expenditure	80.58	104.11	35.37	57.93	60.84	81.89	63.61	103.16	112.88	40.57	134.95	875.89
Zone 1												
Romford town centre												
Asda, Dolphin Approach, Mercury Gardens	17.26	9.14	4.07	2.01	1.47	4.83	6.44	4.38	2.47	0.78	0.91	53.76
Sainsbury's, The Brewery, Romford	12.57	0.64	5.82	0.45	0.79	1.88	5.01	2.87	0.00	1.92	0.00	31.95
Marks & Spencer, South Street, Romford	5.33	0.15	0.97	0.08	0.00	0.87	1.54	3.84	0.35	0.14	0.00	13.26
Aldi, Market Place, Romford	2.50	0.62	0.80	0.09	0.26	2.90	1.31	1.82	0.00	0.27	0.33	10.89
Lidl, Atlanta Bvd, Romford	2.00	0.41	0.76	0.33	0.00	0.22	0.00	0.08	0.00	0.00	0.35	4.16
Other stores, Romford town centre	1.95	0.00	0.31	0.00	0.00	0.00	0.42	0.56	0.00	0.02	0.00	3.26
Sub-total, Romford town centre	**41.61**	**10.97**	**12.73**	**2.96**	**2.51**	**10.70**	**14.72**	**13.56**	**2.82**	**3.13**	**1.59**	**117.29**
Other locations												
Aldi, Marlborough Road, Romford	3.60	0.30	0.59	1.63	0.00	1.84	14.14	1.47	0.00	0.00	2.69	26.26
Gidea Park	0.58	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Other foodstores, Romford / zone 1	6.17	0.47	1.35	0.36	0.00	2.11	2.01	0.78	1.01	0.88	0.00	15.14
Sub-total, survey zone 1	**51.95**	**12.18**	**14.68**	**4.95**	**2.51**	**14.65**	**30.87**	**15.81**	**3.83**	**4.01**	**4.28**	**159.71**
Zone 2												
Tesco Extra, Horchurch Road, Hornchurch	3.80	30.42	9.34	2.94	3.98	0.09	0.05	1.73	5.21	1.76	0.59	59.88
Sainsbury's, High Street, Hornchurch	2.47	28.08	0.35	8.57	2.50	0.67	0.19	0.00	0.00	1.18	0.00	44.00
Iceland, North Street, Hornchurch	0.00	5.31	0.00	1.13	0.00	0.00	0.00	0.00	0.00	0.60	0.00	7.04
Other stores, Hornchurch	0.25	4.52	0.00	2.27	0.15	0.00	0.00	0.00	0.37	0.10	0.00	7.66
Elm Park	0.00	3.99	0.00	2.24	1.02	2.18	0.00	0.09	0.00	0.00	0.00	9.52
Other foodstores, zone 2	0.16	0.26	0.28	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.20
Sub-total, survey zone 2	**6.68**	**72.59**	**9.97**	**17.64**	**7.64**	**2.94**	**0.23**	**1.82**	**5.58**	**3.64**	**0.59**	**129.31**
Zone 3												
Rush Green	0.00	0.00	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.60
Other foodstores, zone 3	0.00	0.00	0.91	0.00	0.00	0.00	0.00	0.00	0.49	0.00	0.00	1.40
Sub-total, survey zone 3	**0.00**	**0.00**	**2.51**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.49**	**0.00**	**0.00**	**3.00**
Zone 4												
Tesco, Airfield Way, Elm Park	0.00	1.52	1.51	12.09	0.36	0.00	0.00	0.00	0.14	0.00	0.00	15.62
Other foodstores, zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total, survey zone 4	**0.00**	**1.52**	**1.51**	**12.09**	**0.36**	**0.00**	**0.00**	**0.00**	**0.14**	**0.00**	**0.00**	**15.62**
Zone 5												
Aldi, St Mary's Lane, Upminster	0.12	4.26	0.00	3.21	15.42	1.65	0.86	0.00	0.11	0.34	1.87	27.83
Waitrose, St Mary's Lane, Upminster	0.56	1.51	0.17	0.11	9.01	0.58	0.00	0.00	0.33	0.00	0.88	13.15
Marks & Spencer Simply Food, Station Road, Upminster	0.47	0.53	0.00	0.26	3.50	1.18	0.00	0.00	0.25	0.16	0.00	6.35
Other foodstores, Upminster	0.00	0.17	0.00	0.04	4.01	0.14	0.00	0.00	0.00	0.10	0.11	4.59
Other foodstores, zone 5	0.00	0.00	0.00	0.00	3.13	0.00	0.00	0.00	0.00	0.00	0.00	3.13
Sub-total, survey zone 5	**1.15**	**6.47**	**0.17**	**3.62**	**35.07**	**3.55**	**0.86**	**0.00**	**0.69**	**0.60**	**2.86**	**55.04**
Zone 6												
Tesco Extra, Bryant Avenue, Romford	13.86	6.84	2.26	0.29	5.17	36.76	10.81	0.00	0.00	0.61	9.84	86.42
Iceland, Farnham Road, Harold Hill	1.35	0.00	0.00	0.00	0.00	6.54	0.23	0.00	0.00	0.17	0.00	8.29
Sainsbury's Local, Farnham Road, Harold Hill	0.00	0.00	0.00	0.00	0.00	2.88	0.00	0.00	0.00	0.00	0.00	2.88
Co-Operative, Station Road, Harold Wood	0.00	0.00	0.00	0.00	0.00	2.69	0.00	0.00	0.00	0.00	0.00	2.69
Other foodstores, Harold Hill	0.00	1.18	0.00	0.00	0.00	4.70	0.27	0.00	0.00	0.08	0.00	6.23
Other foodstores, zone 6	0.06	0.00	0.00	0.00	0.00	1.13	0.00	0.00	0.00	0.00	0.00	1.19
Sub-total, survey zone 6	**15.27**	**8.02**	**2.26**	**0.29**	**5.17**	**54.69**	**11.32**	**0.00**	**0.00**	**0.86**	**9.84**	**107.71**
Zone 7												
Tesco Metro, Collier Row Lane, Collier Row	1.94	0.00	0.20	0.00	0.00	1.05	13.35	0.61	0.00	0.00	0.45	17.60
Other foodstores, zone 7	0.23	0.00	0.00	0.00	0.00	0.00	3.43	0.00	0.00	0.00	0.00	3.66
Sub-total, survey zone 7	**2.17**	**0.00**	**0.20**	**0.00**	**0.00**	**1.05**	**16.78**	**0.61**	**0.00**	**0.00**	**0.45**	**21.27**
Zone 8												
Sainsbury's, High Road, Chadwell Heath	0.94	0.00	1.23	0.29	0.00	0.00	1.00	23.33	1.28	0.09	0.00	28.16
Tesco Extra, High Road, Goodmayes	0.29	0.00	0.33	0.00	0.00	0.00	0.19	16.22	3.54	0.00	0.00	20.57
Tesco Express, High Road, Chadwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.95	0.00	0.00	0.00	5.95
Asda, Whalebone Lane, Chadwell Heath	0.00	0.00	0.51	0.00	0.00	0.00	0.00	2.69	0.99	0.00	0.00	4.19
Other foodstores, zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.05	2.14	0.00	0.00	3.20
Sub-total, survey zone 8	**1.23**	**0.00**	**2.07**	**0.29**	**0.00**	**0.00**	**1.18**	**49.24**	**7.96**	**0.09**	**0.00**	**62.06**
Zone 9												
Asda, Merrielands Crescent, Dagenham	0.00	0.06	0.17	3.03	0.05	0.00	0.78	6.91	39.03	3.41	1.58	55.02
Morrisons, Wood Lane, Becontree Heath	0.04	0.00	0.86	0.21	0.00	0.00	0.00	10.93	8.83	1.23	0.00	22.10
Iceland, Heathway, Dagenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	5.76	0.00	0.00	6.18
Tesco Express, Heathway, Dagenham	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.61	5.17	0.00	0.00	5.83
Lidl, Heathway, Dagenham	0.00	0.00	0.13	0.27	0.00	0.00	0.00	0.42	3.37	0.14	0.00	4.32
Other foodstores, zone 9	0.00	0.30	0.27	1.43	0.05	0.00	0.00	1.72	8.23	2.26	0.00	14.25
Sub-total, survey zone 9	**0.04**	**0.36**	**1.43**	**4.98**	**0.10**	**0.00**	**0.78**	**21.00**	**70.38**	**7.05**	**1.58**	**107.69**
Zone 10												
Tesco Extra, Bridge Road, Rainham	0.00	1.80	0.23	12.01	1.76	0.00	0.00	0.00	6.15	17.97	0.00	39.91
Tesco Express, Rainham Road, Rainham	0.00	0.00	0.00	1.33	0.49	0.23	0.00	0.00	1.00	3.41	0.00	6.46
Other foodstores, zone 10	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	1.98	0.00	0.00	2.14
Sub-total, survey zone 10	**0.00**	**1.80**	**0.23**	**13.50**	**2.25**	**0.23**	**0.00**	**0.00**	**9.14**	**21.37**	**0.00**	**48.51**
Zone 11												
Sainsbury's, William Hunter Way, Brentwood	0.85	0.00	0.00	0.00	1.50	1.30	0.19	0.00	0.00	0.00	65.48	69.32
Marks & Spencer, High Street, Brentwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.05	5.05
Other foodstores, zone 11	0.33	0.17	0.00	0.00	0.00	0.81	0.00	0.53	0.00	0.00	26.31	28.15
Sub-total, survey zone 11	**1.18**	**0.17**	**0.00**	**0.00**	**1.50**	**2.10**	**0.19**	**0.53**	**0.00**	**0.00**	**96.84**	**102.52**
Total for study area	**79.68**	**103.10**	**35.01**	**57.35**	**54.60**	**79.22**	**62.21**	**89.01**	**98.20**	**37.62**	**116.44**	**812.44**
Stores outside study area												
Ilford foodstores	0.00	0.00	0.00	0.04	0.05	0.00	0.50	6.73	1.12	0.00	0.00	8.43
Lakeside / Grays / South Ockendon foodstores	0.00	0.15	0.00	0.49	4.50	0.00	0.00	0.42	0.34	2.49	0.54	8.94
Barking foodstores	0.12	0.00	0.00	0.00	0.18	0.00	0.07	0.00	1.06	0.00	0.00	1.42
Basildon foodstores	0.00	0.00	0.00	0.00	0.00	0.23	0.51	0.00	0.00	0.00	6.53	7.27
Billericay foodstores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.01	5.01
Other foodstores outside study area	0.78	0.85	0.36	0.04	1.51	2.44	0.33	7.00	12.17	0.46	6.43	32.37
Total for outside study area	**0.90**	**1.01**	**0.36**	**0.58**	**6.24**	**2.67**	**1.40**	**14.15**	**14.68**	**2.96**	**18.51**	**63.45**
Overall total	**80.58**	**104.11**	**35.37**	**57.93**	**60.84**	**81.89**	**63.61**	**103.16**	**112.88**	**40.57**	**134.95**	**875.89**

Notes
Source: Table B3, Table B4.
All monetary values held constant at 2016 prices.

Table B6

Foodstore trading assessment

	Survey-derived turnover from SA	Net floorspace	Convenience floorspace(2)	Net convenience floorspace	Average sales density	Benchmark turnover	Under / over-trading
	£m	sq.m	%	sq.m	£ / sq.m net	£m	£m
Romford foodstores							
Asda, Dolphin Approach, Mercury Gardens	53.76	4,745	63.0%	2,989	14,180	42.39	11.37
Sainsbury's, The Brewery, Romford	31.95	5,667	76.0%	4,307	10,764	46.36	-14.41
Marks & Spencer, South Street, Romford	13.26	1,473	95.0%	1,399	10,156	14.21	-0.95
Aldi, Market Place, Romford	10.89	995	97.0%	965	13,766	13.29	-2.39
Lidl, Atlanta Bvd, Romford	4.16	929	99.0%	920	9,626	8.85	-4.69
Aldi, Marlborough Road, Romford	26.26	1,329	97.0%	1,289	13,766	17.75	8.51
Sub-total							**-2.56**
Horchurch foodstores							
Tesco Extra, Horchurch Road, Hornchurch	59.88	6,120	62.0%	3,794	12,006	45.56	14.33
Sainsbury's, High Street, Hornchurch	44.00	3,046	76.0%	2,315	10,764	24.92	19.08
Iceland, North Street, Hornchurch	7.04	502	97.0%	487	7,801	3.80	3.25
Tesco, Airfield Way, Elm Park	15.62	1,228	84.0%	1,032	12,006	12.38	3.24
Sub-total							**39.90**
Upmister foodstores							
Aldi, St Mary's Lane, Upminster	27.83	995	97.0%	965	13,766	13.29	14.54
Waitrose, St Mary's Lane, Upminster	13.15	1,379	95.0%	1,310	11,592	15.19	-2.04
Marks & Spencer Simply Food, Station Road, Upminster	6.35	718	95.0%	682	10,156	6.93	-0.58
Sub-total							**11.92**
Harold Hill / Collier Row foodstores							
Tesco Extra, Bryant Avenue, Romford	86.42	8,253	62.0%	5,117	12,006	61.43	24.99
Sainsbury's Local, Farnham Road, Harold Hill	2.88	274	97.0%	266	10,764	2.86	0.02
Co-Operative, Station Road, Harold Wood	2.69	254	95.0%	241	8,591	2.07	0.62
Tesco Metro, Collier Row Lane, Collier Row	17.60	560	84.0%	470	12,006	5.65	11.96
Sub-total							**37.59**
Rainham foodstores							
Tesco Extra, Bridge Road, Rainham	39.91	5,224	62.0%	3,239	12,006	38.89	1.02
Tesco Express, Rainham Road, Rainham	6.46	250	95.0%	238	10,764	2.56	3.91
Sub-total							**4.93**
Aggregate overtrading of foodstores in Borough							**91.78**

Notes
Foodstores listed are 'main' food shopping destinations with a meaningful market share, as listed in Table B4 and Table B5.
No sales area data is available for Iceland in Harold Hill.
The proportion of convenience floorspace is informed by company average food / non-food splits in Mintel Supermarkets UK report (2017), updated by PBA through site visits where appropriate.
Average sales densities are goods based sales densities derived from Mintel 2017
A positive figure indicates that the store is overtrading compared to company averages.
All monetary values held constant at 2016 prices.

Table B7

Convenience goods floorspace requirements to 2031

Basline requirement

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	447,595	453,489	477,758	507,242	524,121	535,055
B	Total convenience goods expenditure (£m)	875.89	884.52	918.97	969.17	1,000.18	1,020.91
Retained expenditure							
C	Retained convenience goods expenditure in LB Havering (%)	62%	62%	62%	62%	62%	62%
D	Retained convenience goods expenditure in LB Havering (£m)	540.17	545.49	566.73	597.69	616.82	629.60
E	Convenience goods expenditure leakage (£m)	335.72	339.03	352.24	371.48	383.36	391.31
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline convenience goods turnover of stores (£m)	540.17	540.17	540.17	540.17	540.17	540.17
Initial surplus							
I	Growth in retained convenience goods expenditure (£m)	0.00	5.32	26.57	57.53	76.65	89.43
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	0.00	0.00	0.00	0.00	0.00
K	Convenience goods commitments (£m)	0.00	0.00	51.41	51.41	51.41	51.41
L	Total claims on capacity	0.00	0.00	51.41	51.41	51.41	51.41
Expenditure summary							
M	Initial surplus of convenience goods expenditure (£m)	0.00	5.32	26.57	57.53	76.65	89.43
N	Total claims on capacity (£m)	0.00	0.00	51.41	51.41	51.41	51.41
O	Foodstore trading performance allowance (£m)	97.61	97.61	97.61	97.61	97.61	97.61
P	Residual convenience goods expenditure (£m)	97.61	102.93	72.77	103.74	122.86	135.64
Conversion to floorspace need							
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,500	12,500	12,500	12,500	12,500
R	**Convenience goods floorspace need (sq.m net)**	**7,809**	**8,235**	**5,822**	**8,299**	**9,829**	**10,851**
S	Convenience goods floorspace need (sq.m gross)	12,014	12,669	8,957	12,767	15,121	16,694

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
No allowance for sales efficiency growth
Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 65% applied.
All monetary values held constant at 2016 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Aldi Collier Row	11.79	11.79	11.79	11.79	11.79
Lidl Hornchurch	13.83	13.83	13.83	13.83	13.83
Lidl Gooshays Drive	11.14	11.14	11.14	11.14	11.14
Total	*36.76*	*36.76*	*36.76*	*36.76*	*36.76*

*Base turnover is turnover at 2017, in 2016 prices. It is assumed the commitments will commence trading between 2017 and 2021.

APPENDIX C QUANTITATIVE LEISURE NEEDS

Table C1

Population projections

	2016	2017	2021	2026	2029	2031	Change 2016-31
Zone 1	40,208	40,677	42,842	45,760	47,434	48,525	8,317
Zone 2	49,115	49,663	51,955	54,854	56,627	57,731	8,616
Zone 3	19,109	19,423	20,741	22,319	23,236	23,852	4,743
Zone 4	28,904	29,189	30,428	31,971	32,886	33,503	4,599
Zone 5	27,687	27,951	29,102	30,435	31,217	31,718	4,031
Zone 6	43,969	44,504	46,858	49,963	51,797	52,998	9,029
Zone 7	31,390	31,793	33,293	35,280	36,380	37,141	5,751
Zone 8	59,989	61,065	65,220	69,934	72,492	74,138	14,149
Zone 9	64,193	65,376	69,861	74,602	77,066	78,593	14,400
Zone 10	21,233	21,504	22,696	24,265	25,235	25,863	4,630
Zone 11	61,798	62,344	64,762	67,859	69,751	70,993	9,195
Total	**447,595**	**453,489**	**477,758**	**507,242**	**524,121**	**535,055**	**87,460**

Notes
Source: Experian MMG3 (2017) for base year and population projections (derived from ONS 2014-based subnational population projections).

Table C2
Per capita expenditure on leisure services

	2016	2017	2021	2026	2029	2031
	£	£	£	£	£	£
Accommodation services						
Zone 1	310	311	320	339	351	360
Zone 2	343	344	354	375	388	398
Zone 3	209	210	216	228	237	242
Zone 4	245	246	253	268	277	284
Zone 5	386	387	398	422	437	448
Zone 6	196	197	202	214	222	227
Zone 7	251	252	259	274	284	291
Zone 8	163	163	168	178	185	189
Zone 9	146	146	151	160	165	169
Zone 10	217	218	224	237	246	252
Zone 11	389	390	402	425	440	451
Cultural services						
Zone 1	298	299	308	326	337	346
Zone 2	330	331	341	361	374	383
Zone 3	258	259	266	282	292	299
Zone 4	293	294	302	320	332	340
Zone 5	340	341	351	371	385	394
Zone 6	253	254	261	276	286	293
Zone 7	299	300	309	327	339	347
Zone 8	204	205	211	223	231	237
Zone 9	213	214	220	233	241	247
Zone 10	277	278	286	303	314	321
Zone 11	374	375	386	409	424	434
Games of chance						
Zone 1	127	127	131	139	144	147
Zone 2	155	155	160	169	176	180
Zone 3	131	131	135	143	148	152
Zone 4	173	174	179	189	196	201
Zone 5	142	142	147	155	161	165
Zone 6	138	138	142	151	156	160
Zone 7	168	169	173	184	190	195
Zone 8	93	93	96	102	105	108
Zone 9	112	112	116	122	127	130
Zone 10	167	168	172	182	189	194
Zone 11	151	151	156	165	171	175
Hairdressing salons & personal grooming						
Zone 1	122	122	126	133	138	141
Zone 2	137	137	141	150	155	159
Zone 3	85	85	88	93	96	99
Zone 4	105	105	108	115	119	122
Zone 5	156	156	161	170	177	181
Zone 6	78	78	81	85	88	90
Zone 7	103	103	106	113	117	119
Zone 8	53	53	55	58	60	61
Zone 9	56	56	58	61	63	65
Zone 10	92	92	95	101	104	107
Zone 11	147	147	152	161	166	170
Recreational & sporting goods						
Zone 1	201	202	208	220	228	233
Zone 2	218	219	225	238	247	253
Zone 3	153	153	158	167	173	177
Zone 4	160	160	165	175	181	186
Zone 5	236	237	244	258	267	274
Zone 6	129	129	133	141	146	150
Zone 7	145	145	150	158	164	168
Zone 8	145	145	150	158	164	168
Zone 9	106	106	109	116	120	123
Zone 10	142	142	147	155	161	165
Zone 11	172	173	178	188	195	199
Restaurants & cafes						
Zone 1	1,258	1,262	1,299	1,374	1,425	1,459
Zone 2	1,331	1,335	1,374	1,454	1,507	1,544
Zone 3	1,015	1,018	1,048	1,109	1,149	1,177
Zone 4	1,113	1,116	1,149	1,216	1,260	1,291
Zone 5	1,377	1,381	1,422	1,504	1,559	1,597
Zone 6	919	922	949	1,004	1,041	1,066
Zone 7	1,093	1,096	1,128	1,194	1,238	1,268
Zone 8	722	724	745	789	818	837
Zone 9	740	742	764	808	838	858
Zone 10	1,016	1,019	1,049	1,110	1,150	1,178
Zone 11	1,399	1,403	1,444	1,528	1,584	1,622

Notes
Source: Experian MMG for 2016 base data
Expenditure growth rates derived from Experian Retail Planner Briefing Note 15, December
All monetary values are held constant at 2016 prices.

Table C3
Total expenditure on leisure services

	2016	2017	2021	2026	2029	2031	Change 2016-31
	£m	£m	£m	£m	£m	£m	£m
Accommodation services							
Zone 1	12.46	12.65	13.71	15.50	16.65	17.45	4.98
Zone 2	16.85	17.09	18.40	20.56	21.99	22.96	6.12
Zone 3	3.99	4.07	4.48	5.10	5.50	5.78	1.79
Zone 4	7.08	7.17	7.70	8.56	9.12	9.52	2.44
Zone 5	10.69	10.82	11.60	12.84	13.64	14.20	3.51
Zone 6	8.62	8.75	9.48	10.70	11.50	12.05	3.43
Zone 7	7.88	8.00	8.63	9.67	10.34	10.81	2.93
Zone 8	9.78	9.98	10.97	12.45	13.38	14.01	4.24
Zone 9	9.37	9.57	10.53	11.90	12.74	13.31	3.93
Zone 10	4.61	4.68	5.08	5.75	6.20	6.51	1.90
Zone 11	24.04	24.32	26.01	28.84	30.72	32.03	7.99
Total	**115.37**	**117.11**	**126.58**	**141.87**	**151.79**	**158.62**	**43.25**
Cultural services							
Zone 1	11.98	12.16	13.18	14.90	16.01	16.77	4.79
Zone 2	16.21	16.44	17.70	19.78	21.16	22.09	5.89
Zone 3	4.93	5.03	5.52	6.29	6.79	7.14	2.21
Zone 4	8.47	8.58	9.20	10.23	10.91	11.38	2.92
Zone 5	9.41	9.53	10.21	11.31	12.02	12.51	3.09
Zone 6	11.12	11.29	12.24	13.81	14.84	15.55	4.43
Zone 7	9.39	9.53	10.28	11.53	12.32	12.88	3.49
Zone 8	12.24	12.49	13.74	15.59	16.75	17.54	5.30
Zone 9	13.67	13.97	15.36	17.36	18.59	19.41	5.74
Zone 10	5.88	5.97	6.49	7.34	7.92	8.31	2.43
Zone 11	23.11	23.39	25.00	27.73	29.54	30.79	7.68
Total	**126.42**	**128.38**	**138.93**	**155.86**	**166.83**	**174.37**	**47.96**
Games of chance							
Zone 1	5.11	5.18	5.62	6.35	6.82	7.15	2.04
Zone 2	7.61	7.72	8.31	9.29	9.94	10.38	2.76
Zone 3	2.50	2.55	2.80	3.19	3.45	3.62	1.12
Zone 4	5.00	5.06	5.43	6.04	6.44	6.72	1.72
Zone 5	3.93	3.98	4.27	4.72	5.02	5.22	1.29
Zone 6	6.07	6.16	6.68	7.53	8.09	8.48	2.41
Zone 7	5.27	5.36	5.77	6.48	6.92	7.24	1.96
Zone 8	5.58	5.70	6.26	7.11	7.63	8.00	2.42
Zone 9	7.19	7.34	8.08	9.13	9.77	10.21	3.02
Zone 10	3.55	3.60	3.91	4.43	4.77	5.01	1.46
Zone 11	9.33	9.44	10.10	11.20	11.93	12.43	3.10
Total	**61.14**	**62.10**	**67.23**	**75.46**	**80.79**	**84.46**	**23.31**
Hairdressing salons & personal grooming							
Zone 1	4.91	4.98	5.40	6.10	6.55	6.87	1.65
Zone 2	6.73	6.82	7.35	8.21	8.78	9.17	2.06
Zone 3	1.62	1.66	1.82	2.07	2.24	2.35	0.61
Zone 4	3.03	3.07	3.30	3.67	3.91	4.08	0.88
Zone 5	4.32	4.37	4.69	5.19	5.51	5.74	1.20
Zone 6	3.43	3.48	3.77	4.26	4.57	4.79	1.15
Zone 7	3.23	3.28	3.54	3.97	4.24	4.44	1.01
Zone 8	3.18	3.25	3.57	4.05	4.35	4.56	1.17
Zone 9	3.59	3.67	4.04	4.56	4.89	5.10	1.29
Zone 10	1.95	1.98	2.16	2.44	2.63	2.76	0.68
Zone 11	9.08	9.19	9.83	10.90	11.61	12.10	2.53
Total	**45.09**	**45.77**	**49.45**	**55.42**	**59.29**	**61.96**	**16.87**
Recreational & sporting goods							
Zone 1	8.08	8.20	8.89	10.05	10.80	11.31	3.23
Zone 2	10.71	10.86	11.69	13.06	13.98	14.60	3.89
Zone 3	2.92	2.98	3.28	3.73	4.03	4.23	1.31
Zone 4	4.62	4.68	5.03	5.59	5.96	6.22	1.59
Zone 5	6.53	6.62	7.09	7.85	8.34	8.68	2.15
Zone 6	5.67	5.76	6.24	7.04	7.57	7.93	2.26
Zone 7	4.55	4.62	4.98	5.59	5.97	6.25	1.69
Zone 8	8.70	8.88	9.76	11.08	11.90	12.47	3.77
Zone 9	6.80	6.95	7.64	8.64	9.25	9.66	2.86
Zone 10	3.02	3.06	3.33	3.76	4.06	4.26	1.24
Zone 11	10.63	10.76	11.50	12.75	13.59	14.16	3.53
Total	**72.24**	**73.37**	**79.43**	**89.15**	**95.44**	**99.76**	**27.52**
Restaurants & cafes							
Zone 1	50.58	51.33	55.64	62.89	67.57	70.79	20.21
Zone 2	65.37	66.30	71.39	79.77	85.35	89.11	23.74
Zone 3	19.40	19.77	21.73	24.75	26.71	28.08	8.68
Zone 4	32.17	32.58	34.96	38.88	41.45	43.24	11.07
Zone 5	38.12	38.60	41.37	45.79	48.68	50.65	12.53
Zone 6	40.41	41.02	44.46	50.17	53.90	56.48	16.08
Zone 7	34.31	34.85	37.57	42.13	45.03	47.08	12.77
Zone 8	43.31	44.22	48.61	55.17	59.27	62.08	18.76
Zone 9	47.50	48.52	53.37	60.32	64.58	67.45	19.94
Zone 10	21.57	21.91	23.81	26.94	29.03	30.47	8.90
Zone 11	86.46	87.48	93.53	103.72	110.50	115.18	28.73
Total	**479.20**	**486.60**	**526.44**	**590.51**	**632.05**	**660.61**	**181.41**

Notes
Source: Table C1, Table C2
All monetary values are held constant at 2016 prices.

Table C4

Restaurants market shares 2014

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Main destinations in Havering Borough											
Romford	34.33%	17.20%	28.45%	9.49%	2.29%	19.73%	27.59%	23.79%	28.16%	11.25%	0.56%
Hornchurch	16.03%	49.52%	29.49%	40.33%	11.82%	3.02%	5.88%	1.85%	5.54%	19.63%	0.00%
Upminster	0.00%	1.92%	0.00%	7.55%	50.64%	1.25%	0.00%	0.00%	0.88%	1.21%	1.12%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Collier Row	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.55%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.00%	1.01%	0.00%	0.00%	0.00%	0.00%	1.36%	12.66%	0.00%
Harold Hill	1.56%	0.00%	0.59%	0.00%	0.00%	1.15%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	**51.92%**	**68.64%**	**58.52%**	**58.38%**	**64.75%**	**25.14%**	**39.01%**	**25.65%**	**35.94%**	**44.75%**	**1.68%**
Other locations											
Brentwood	3.08%	1.79%	2.27%	3.00%	6.83%	19.49%	8.19%	0.00%	0.48%	0.00%	52.37%
Central London	6.69%	13.72%	5.79%	2.31%	6.96%	8.58%	4.28%	11.02%	7.42%	9.43%	6.72%
Dagenham	0.00%	0.00%	1.68%	0.00%	0.00%	0.00%	0.00%	6.37%	11.65%	0.70%	0.00%
Lakeside	1.09%	3.23%	4.26%	4.97%	0.86%	2.49%	6.24%	1.41%	5.05%	18.29%	3.68%
Other locations	4.42%	2.02%	6.92%	3.00%	6.72%	1.87%	4.72%	16.59%	12.63%	5.85%	16.78%
Sub-total, other locations	**15.28%**	**20.76%**	**20.91%**	**13.27%**	**21.37%**	**32.43%**	**23.43%**	**35.39%**	**37.22%**	**34.27%**	**79.54%**
Total	**67.20%**	**89.40%**	**79.43%**	**71.65%**	**86.12%**	**57.57%**	**62.44%**	**61.04%**	**73.16%**	**79.01%**	**81.21%**
(Don't know / varies)	13.17%	0.00%	5.44%	5.26%	3.95%	4.82%	7.18%	10.38%	11.45%	5.90%	13.22%
(Don't do this activity)	19.63%	10.60%	15.13%	23.09%	9.93%	37.61%	30.39%	28.59%	15.40%	15.09%	5.57%
Overall total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Excluding 'don't know / don't do this activity'											
Main destinations in Havering Borough											
Romford	51.09%	19.24%	35.81%	13.25%	2.66%	34.27%	44.19%	38.98%	38.49%	14.24%	0.69%
Hornchurch	23.85%	55.39%	37.12%	56.28%	13.73%	5.24%	9.41%	3.04%	7.58%	24.84%	0.00%
Upminster	0.00%	2.15%	0.00%	10.54%	58.80%	2.17%	0.00%	0.00%	1.20%	1.54%	1.37%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Collier Row	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	8.89%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.00%	0.00%	1.85%	16.02%	0.00%
Harold Hill	2.32%	0.00%	0.75%	0.00%	0.00%	1.99%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	**77.26%**	**76.78%**	**73.68%**	**81.48%**	**75.19%**	**43.67%**	**62.48%**	**42.02%**	**49.12%**	**56.63%**	**2.06%**
Other locations											
Brentwood	4.58%	2.00%	2.86%	4.18%	7.93%	33.85%	13.12%	0.00%	0.65%	0.00%	64.48%
Central London	9.95%	15.35%	7.29%	3.22%	8.08%	14.90%	6.85%	18.05%	10.14%	11.93%	8.27%
Dagenham	0.00%	0.00%	2.11%	0.00%	0.00%	0.00%	0.00%	10.43%	15.92%	0.88%	0.00%
Lakeside	1.62%	3.61%	5.36%	6.93%	1.00%	4.32%	9.99%	2.31%	6.90%	23.15%	4.53%
Other locations	6.58%	2.26%	8.71%	4.19%	7.80%	3.25%	7.56%	27.19%	17.27%	7.40%	20.66%
Sub-total, other locations	**22.74%**	**23.22%**	**26.32%**	**18.52%**	**24.81%**	**56.33%**	**37.52%**	**57.98%**	**50.88%**	**43.37%**	**97.94%**
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey results

Table C5

Café, pubs & bars market shares 2014

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Main destinations in Havering Borough											
Romford	35.37%	19.93%	28.07%	10.65%	1.66%	20.02%	11.13%	23.32%	8.23%	17.12%	0.56%
Hornchurch	5.50%	40.79%	19.48%	44.93%	6.69%	1.47%	3.23%	2.82%	2.56%	19.74%	0.00%
Upminster	0.00%	2.19%	0.81%	1.70%	48.16%	1.15%	0.00%	0.00%	0.00%	0.70%	0.56%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.38%	0.00%
Collier Row	0.59%	0.00%	0.00%	0.00%	0.00%	0.00%	12.27%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.59%	1.20%	0.00%	0.00%	0.00%	0.00%	0.00%	12.43%	0.00%
Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	2.29%	3.08%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	**41.46%**	**62.91%**	**48.95%**	**58.47%**	**56.51%**	**24.93%**	**29.72%**	**26.13%**	**10.78%**	**53.37%**	**1.12%**
Other locations											
Brentwood	1.62%	1.92%	1.63%	1.62%	2.95%	9.54%	1.63%	0.00%	0.48%	1.46%	55.10%
Central London	8.54%	7.93%	1.09%	1.38%	3.51%	8.86%	4.54%	6.56%	7.59%	1.89%	2.23%
Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.92%	12.95%	1.21%	0.00%
Chadwell Heath	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.70%	4.27%	0.00%	0.00%
Lakeside	0.00%	3.82%	0.00%	0.69%	0.63%	0.00%	0.69%	0.00%	0.65%	5.15%	0.00%
Other locations	4.89%	3.05%	7.19%	1.20%	5.00%	6.59%	2.32%	5.59%	8.77%	0.51%	6.16%
Sub-total, other locations	**16.60%**	**16.72%**	**9.91%**	**4.88%**	**12.09%**	**24.99%**	**9.18%**	**23.77%**	**34.71%**	**10.22%**	**63.49%**
Total	**58.06%**	**79.63%**	**58.85%**	**63.36%**	**68.60%**	**49.92%**	**38.89%**	**49.90%**	**45.49%**	**63.58%**	**64.61%**
(Don't know / varies)	8.54%	0.88%	3.95%	2.12%	6.93%	3.57%	2.32%	5.55%	7.22%	2.86%	6.57%
(Don't do this activity)	33.41%	19.49%	37.20%	34.52%	24.47%	46.52%	58.79%	44.54%	47.29%	33.56%	28.83%
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**
Excluding 'don't know / don't do this activity'											
Main destinations in Havering Borough											
Romford	60.92%	25.02%	47.70%	16.80%	2.42%	40.10%	28.63%	46.72%	18.08%	26.93%	0.87%
Hornchurch	9.48%	51.22%	33.09%	70.92%	9.76%	2.95%	8.30%	5.64%	5.62%	31.04%	0.00%
Upminster	0.00%	2.76%	1.37%	2.68%	70.20%	2.29%	0.00%	0.00%	0.00%	1.10%	0.87%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.31%	0.00%
Collier Row	1.02%	0.00%	0.00%	0.00%	0.00%	0.00%	31.56%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	1.01%	1.89%	0.00%	0.00%	0.00%	0.00%	0.00%	19.55%	0.00%
Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	4.59%	7.92%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	**71.41%**	**79.00%**	**83.16%**	**92.29%**	**82.37%**	**49.94%**	**76.41%**	**52.36%**	**23.70%**	**83.93%**	**1.73%**
Other locations	0.00%										
Brentwood	2.78%	2.41%	2.77%	2.56%	4.30%	19.11%	4.19%	0.00%	1.05%	2.29%	85.29%
Central London	14.70%	9.96%	1.85%	2.18%	5.12%	17.74%	11.66%	13.15%	16.68%	2.97%	3.45%
Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.85%	28.47%	1.91%	0.00%
Chadwell Heath	2.68%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	19.44%	9.39%	0.00%	0.00%
Lakeside	0.00%	4.80%	0.00%	1.09%	0.92%	0.00%	1.77%	0.00%	1.43%	8.09%	0.00%
Other locations	8.42%	3.84%	12.22%	1.89%	7.29%	13.21%	5.97%	11.20%	19.28%	0.81%	9.53%
Sub-total, other locations	**28.59%**	**21.00%**	**16.84%**	**7.71%**	**17.63%**	**50.06%**	**23.59%**	**47.64%**	**76.30%**	**16.07%**	**98.27%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey results

Table C6

Summary of A3, A4 & A5 floorspace requirements

		2016	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population	447,595	453,489	477,758	507,242	524,121	535,055
B	Total study area expenditure on food & drink	479.20	486.60	526.44	590.51	632.05	660.61
Retained expenditure							
C	Retained food & drink expenditure[1]	54%	54%	54%	54%	54%	54%
D	Retained food & drink expenditure	258.99	262.99	284.52	319.15	341.60	357.04
E	Expenditure leakage	220.21	223.61	241.91	271.36	290.45	303.57
Inflow							
F	Inflow[2]	0%	0%	0%	0%	0%	0%
G	Inflow	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover of food & drink facilities							
H	Total turnover	258.99	258.99	258.99	258.99	258.99	258.99
Initial surplus							
I	Growth in retained expenditure	0.00	4.00	25.53	60.16	82.61	98.05
Claims on expenditure							
J	Sales efficiency growth in existing operators[3]	0.00	3.90	9.20	15.97	20.12	22.92
K	Commitments for new floorspace	0	0	0	0	0	0
L	Total claims on capacity	**0.00**	**3.90**	**9.20**	**15.97**	**20.12**	**22.92**
Expenditure summary							
M	Initial surplus of expenditure	0.00	4.00	25.53	60.16	82.61	98.05
N	Total claims on capacity	0.00	3.90	9.20	15.97	20.12	22.92
O	Residual expenditure	**0.00**	**0.09**	**16.33**	**44.18**	**62.49**	**75.13**
Conversion to floorspace requirements							
P	Assumed turnover per sq.m[4]	6,500	6,598	6,731	6,901	7,005	7,075
Q	**Gross food & drink floorspace requirement[5]**	**0**	**14**	**2,426**	**6,403**	**8,921**	**10,619**

Notes
All monetary values are held constant at 2016 prices.
Sales efficiency growth rate of 0.5% per annum applied.

Table C7

Cinema & theatre market shares 2014

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Main destinations in Havering Borough											
Vue, The Brewery, Romford	25.16%	36.54%	30.32%	16.50%	7.98%	16.02%	24.56%	22.89%	25.72%	15.03%	10.74%
Premiere Cinema, Mercury Mall, Romford	23.97%	14.86%	23.18%	17.79%	4.37%	17.93%	7.58%	3.78%	1.53%	9.05%	0.76%
Brookside Theatre, Eastern Road, Romford	0.00%	0.00%	0.00%	0.00%	2.52%	0.00%	2.21%	0.00%	0.00%	0.00%	0.00%
Queens Theatre, Billet Lane, Hornchurch	1.68%	2.22%	2.88%	5.10%	2.98%	1.87%	3.70%	1.41%	0.48%	3.00%	0.00%
Sub-total, LB Havering centres	**50.81%**	**53.62%**	**56.38%**	**39.39%**	**17.85%**	**35.82%**	**38.05%**	**28.07%**	**27.73%**	**27.08%**	**11.50%**
Other locations											
Central London (West End)	14.91%	11.47%	3.17%	8.28%	16.99%	7.44%	3.84%	11.04%	6.98%	7.17%	24.63%
Vue, Dagenham Leisure Park, Dagenham	0.00%	0.66%	0.00%	1.62%	0.00%	0.00%	1.21%	3.52%	19.51%	19.65%	0.00%
Vue, Lakeside Shopping Centre, Thurrock	0.00%	5.74%	1.56%	8.10%	35.41%	2.26%	5.07%	0.00%	4.16%	17.19%	6.31%
Empire Cinemas, Festival Leisure Park, Basildon	0.00%	0.00%	0.00%	0.51%	0.86%	0.85%	0.00%	0.00%	0.00%	0.00%	25.63%
Other locations	0.00%	5.08%	4.49%	5.31%	4.90%	5.74%	1.27%	6.17%	4.19%	0.00%	1.52%
Sub-total, other locations	**14.91%**	**22.95%**	**9.21%**	**23.82%**	**58.16%**	**16.29%**	**11.39%**	**20.73%**	**34.84%**	**44.01%**	**58.09%**
Total	**65.72%**	**76.57%**	**65.59%**	**63.20%**	**76.01%**	**52.10%**	**49.44%**	**48.80%**	**62.57%**	**71.08%**	**69.59%**
(Don't know / varies)	7.73%	0.48%	3.89%	0.51%	0.86%	5.38%	3.77%	3.30%	4.74%	2.10%	6.86%
(Don't do this activity)	26.55%	22.95%	30.52%	36.29%	23.13%	42.53%	46.79%	47.90%	32.69%	26.82%	23.56%
Overall total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Excluding 'don't know / don't do this activity'											
Main destinations in Havering Borough											
Vue, The Brewery, Romford	38.29%	47.72%	46.22%	26.10%	10.50%	30.75%	49.67%	46.89%	41.11%	21.15%	15.43%
Premiere Cinema, Mercury Mall, Romford	36.47%	19.41%	35.34%	28.14%	5.75%	34.40%	15.33%	7.74%	2.44%	12.73%	1.09%
Brookside Theatre, Eastern Road, Romford	0.00%	0.00%	0.00%	0.00%	3.31%	0.00%	4.47%	0.00%	0.00%	0.00%	0.00%
Queens Theatre, Billet Lane, Hornchurch	2.56%	2.90%	4.39%	8.07%	3.92%	3.59%	7.49%	2.89%	0.76%	4.21%	0.00%
Sub-total, LB Havering centres	**77.31%**	**70.03%**	**85.95%**	**62.32%**	**23.48%**	**68.74%**	**76.96%**	**57.52%**	**44.31%**	**38.09%**	**16.53%**
Other locations											
Central London (West End)	22.69%	14.98%	4.84%	13.10%	22.35%	14.27%	7.77%	22.63%	11.16%	10.08%	35.39%
Vue, Dagenham Leisure Park, Dagenham	0.00%	0.86%	0.00%	2.56%	0.00%	0.00%	2.45%	7.21%	31.18%	27.64%	0.00%
Vue, Lakeside Shopping Centre, Thurrock	0.00%	7.49%	2.37%	12.82%	46.59%	4.34%	10.26%	0.00%	6.65%	24.18%	9.06%
Empire Cinemas, Festival Leisure Park, Basildon	0.00%	0.00%	0.00%	0.80%	1.13%	1.63%	0.00%	0.00%	0.00%	0.00%	36.84%
Other locations	0.00%	6.64%	6.84%	8.40%	6.45%	11.01%	2.57%	12.64%	6.69%	0.00%	2.19%
Sub-total, other locations	**22.69%**	**29.97%**	**14.05%**	**37.68%**	**76.52%**	**31.26%**	**23.04%**	**42.48%**	**55.69%**	**61.91%**	**83.47%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey results

APPENDIX D TECHNICAL INPUTS

Data	Source	How we have used the data
Base population	Experian	Experian's MMG3 software provides 2014-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for our analysis.
Population projections	Experian	Experian's MMG software provides annual population projections over the period to 2031, and we use these forecasts where applicable.
Base per capita expenditure	Experian	Experian's MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.
Retail and leisure expenditure growth forecasts	Experian	We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 15 (Appendix 3 Figure 6). As explained below, these make allowance for SFT. For leisure expenditure growth, we use the rates set out at Figure 1a of the same note.
Base Year Special Forms of Trading (SFT)	Experian / Household survey	Special Forms of Trading refers to the amount of money not spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian's Retail Planner Briefing Note 16 (Appendix 3) advises the following SFT discounts at the base year of the study: Comparison goods (2016): 13.5% Convenience goods (2016): 2.9% For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions.
Growth in SFT	Experian	Experian's Retail Planner Briefing Note 15 (Appendix 3 Figure 6) sets out comparison and convenience growth rates excluding SFT at the study forecast years: For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions. Experian do not project SFT to 2031 and therefore the 2026 is held constant for the remainder of the study period.
Retailer productivity changes	GLA/Experian	Experian's forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis, including a sensitivity for a higher sales efficiency in the comparison goods sector: Comparison goods: 2% (base) or 2.5% (high) Convenience goods: 0% per annum