Havering Retail & Commercial Leisure Needs Assessment

Volume 2 - Appendices

On behalf of **The London Borough of Havering**

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Appendices

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Appendix A Centre Health Checks

Appendix: Collier Row District Centre Health Check

PPG indicator	Summary for Collier Row District Centre	Traffic light score
Diversity of uses	Collier Row is a district centre located in the North Western part of the Borough. The centre appears to have an adequate diversity of uses that mostly caters to the day to day needs of the residents. The main retail frontage is along Collier Row Road with some units fronting Clockhouse Lane and Chase Cross Road. Generally, representation is geared towards convenience and service operators. The provision of comparison goods by national multiple retailers is largely limited. There seems to be fairly high provision of hot food take-aways within the district centre. In addition there are a number of services offered within the centre including a funeral home, banks, a post office, solicitors, hair salons and estate agents. There commercial leisure space within the town centre with the exception of a pub and two restaurants. Key retailers in the town include Tesco Metro, Boots Costcutters and Londis. With the exception of the Tesco, the retail units within the town centre are mostly small in size. There seemed to be no significant cultural or leisure amenities within the town centre. Similarly, the evening economy appears to be limited to the pub and two restaurants. The offering in the town centre is generally on the lower end of the market especially when the provision of hot food take aways and charity shops is taken into consideration.	
Proportion of vacant street level property	The Experian Goad survey undertaken in January 2014 identified nine vacant units. This puts the proportion of vacant units at 12.2%. At the time of the town centre visits in October 2014 however the number of vacant units stood at 11. The proportion of vacant properties has therefore grown and currently stands at 14.8%. This figure is higher than the current national average of 12.5%. There are no particular concentrations of vacant properties within the town centre though there is some evidence of clustering along Clockhouse Lane. At the same time there appears to be small scale additions to the retail mix within the town centre with the development of two retail units along Collier Row Lane which have yet to be occupied.	
Retailer representation and intentions to change representation	The majority of retailers and food outlets are independently owned. The convenience offer within Collier Row is dominated by Tesco Metro alongside Costcutter and Londis. There are no national multiple clothing and footwear retailers within the town centre except for charity shops and some independent shops. Other national multiples present include Boots, Lloyds Pharmacy, Lloyds Bank, a Post Office, Greggs, Coral Betting, a JD Wetherspoon operated pub, Domino's Pizza and Pizza Hut.	
Pedestrian flows	The flow of pedestrians within the town centre is generally good. The town centre is largely linear in nature with most of the retail units located along Collier Row Road which makes pedestrian circulation easy. While vehicular traffic moves fairly fast along the road, it is not difficult to cross from one side of the street to another. Collier Row generally has the highest amount of footfall within the town centre.	
Accessibility	Collier Row is fairly accessible from the surrounding centres such as Romford and Dagenham. The centre does not have a train station but it is served by six bus routes. Parking within the town centre is limited to pay and display parking spaces along Collier Row Road though there is a large off-street parking along rex Close behind the Tesco	

Appendix: Collier Row District Centre Health Check

PPG indicator	Summary for Collier Row District Centre	Traffic light score
	Supermarket.	
Perception of safety/ occurrence of crime	The perception crime within the district centre appears to be fairly low. There were no obvious signs of neglect or vandalism and the linear nature of the town centre increase instances of passive surveillance. The limited evening economy may perhaps make the town centre seem isolated at night. Particular areas of concern include the area at the corner of Chase Cross Road and Clockhouse Lane due to the vacant retail units.	
State of district centre environmental quality	The environmental quality of the district centre is generally good. The buildings within the district centre have a coherent architectural style which makes the town centre a pleasant place to visit. The public realm is generally clean and tidy. There seems to have been some investment within the district centre public realm with such improvements as new street lights, wide pavements and new benches along Collier Row Road.	

Appendix: Elm Park District Centre Health check

PPG indicator	Summary for Elm Park District Centre	Traffic light score
Diversity of uses	Elm Park is located in the south western part of the Borough. The major retail frontages are located either side of Elm Park Underground Station. To the South the main retail frontages are Station Parade and Tadworth Parade. To the North the majority of retail units are located along the Broadway or front onto the junction of Elm Park Avenue/St. Nicholas Avenue/The Broadway. The centre has good diversity of convenience, comparison and service uses which cater for daily shopping needs. The convenience offer comprises national multiple retailers as well as a range of independent stores including general convenience stores, a bakery and butchers. National multiples present include Co-op food, Tesco Metro and Sainsbury's Local. The comparison offer is comprised of independent stores mainly selling hardware, homeware and gift ware, however there is also a jeweller, pet shop, and cycle shop. Elm Park offers a diverse range of local services including a bank, funeral directors, mortgage centre, laptop repair, shop mobility centre, tailors, dry cleaners, travel agents, betting office and hair/beauty salons. There is no cultural or commercial leisure offer in the centre however the centre comprises four independent cafes. The evening economy is limited to a few restaurants and a total of eleven take-aways which account for 10% of all units.	
Proportion of vacant street level property	The number of vacancies within Elm Park District Centre was 16 when we undertook the town centre survey in October 2014. This is equivalent to 14% of the total number of units which is above the national average of 12.5%. There are two main areas where concentrations of vacant units have accumulated. There is a noticeably high number of vacant units along Station Parade as well as a number of vacant units either side of Nicholas Avenue.	
Retailer representation and intentions to change representation	Elm Park provides a strong local independent retail offer of local services and a diverse convenience offer. The comparison offer however is towards the lower end of the market. A high proportion of the comparison units are charity shops and discount home ware stores. There are no national multiple comparison retailers. The only National Multiple retailers present in the centre are Greggs, Dominoes, Co-op, Tesco and Sainsbury's.	
Pedestrian flows	There was relatively weak pedestrian footfall along the main retail frontages both to the north and south of Elm Park Underground Station. The pedestrian footfall was however stronger to the north of the station along streets with cafes and restaurants which seemed to generate more activity.	
Accessibility	The flow of pedestrians through the town centre is constrained by the original layout of the centre. The roundabouts at either end of The Broadway act as a barriers to pedestrian accessibility although the pedestrian crossings do help address this. The provision of off-road car parking at each end of The Broadway make local shops and services more convenient to access for car users. The centre is well connected to the London transport system and the rest of the Borough via the District Line and four bus routes (165, 252, 365, 372) that serve the centre.	

Appendix: Elm Park District Centre Health check

PPG indicator	Summary for Elm Park District Centre	Traffic light score
Perception of safety/ occurrence of crime	The perception of safety is also markedly different either side of the rail station. There is almost no perception of crime along the main shopping frontages to the north of the station. Since most of the shops are located along main roads there is plenty of natural surveillance. The only area of concern is the car park located off St. Nicholas Avenue. The car park is highly enclosed with dead frontages on three out of four sides since the only non-domestic building fronting onto the car park is vacant. The two main shopping frontages to the south of the station, Station Parade and Tadworth Parade both show signs that create a higher perception of crime. Station Parade feels particularly unsafe since it is highly enclosed, set back from the main road behind a relatively high brick wall with very limited natural surveillance. This part of the centre appears neglected, on our visit nearly half of the shops fronts were covered with security shutters either because units were vacant or occupied by take-aways which only opened in the evening. Similarly along Tadworth Parade the concentration of take-away units covered with security shutters create an impression of neglect and reduce the perception of safety.	
State of town centre environmental quality	The properties fronting on to either side of The Broadway are uniform in architectural style and have sufficient architectural detailing to create visual interest. These frontages are of a consistent height which creates a good sense of enclosure. This part of the centre is relatively free from litter and there is evidence of recent investment in upgraded paving and new street furniture. Overall this part of the centre has a good environmental quality. At the southern end of The Broadway the frontages of buildings along Tadworth Parade and Station Parade contain very little detailing and create no visual interest. The properties either side of Station Parade appear to be in a state of decay which gives the area a very poor environmental quality. At the northern end of the Broadway the buildings fronting on to the roundabout represent a variety of architectural styles. This informality creates visual interest although the appearance of some key buildings could be dramatically improved with maintenance. Again there are signs of recent investment in the form of improved paving and new street furniture. Consistent elements including the street lights and new paving and street furniture help to create uniformity between different parts of the centre.	

Appendix: Harold Hill District Centre Health Check

PPG indicator	Summary for Harold Hill District Centre	Traffic light score
Diversity of uses	Harold Hill district centre is a district centre focusing primarily on the provision of convenience goods and some services such as banking and hairdressing. In addition the centre also offers a restaurant; café and hot food take aways. The centre largely serves local residents. The centre is mixed-use as it is located within a medium density housing scheme. The centre offers a Sainsbury's Local, Iceland, Co-Operative Food, a butchers, a news agents, a discount supermarket, a charity shop, a café and restaurant. Most of the retail units are independently owned though familiar High Street names have established themselves in the centre. Services offered within the town centre include Banking (Halifax, Santander, Lloyds and NatWest), as well as a barber shop, hairdressers, Boots Optician, a post office and a dry cleaners. The centre also contains the Council's housing office. The district centre is therefore suited to meeting the day to day needs of the local residents. However the town centre lacks significant clothing and footwear retailers although this would be expected for a centre of its size. Furthermore, leisure options are limited to the café, an American themed restaurant and a few take-away restaurants. The relocated Harold Hill Library that is currently under construction will improve the diversity of uses in the district centre.	
Proportion of vacant street level property	At the time the Experian Goad survey was done (September 2012) the proportion of vacant units stood at 11 units or 15.3% of the retail offer. It is important to note that since the survey was carried out two larger retail units have been subdivided into smaller shops. Furthermore, five shop units have been closed down or demolished in order to make way for the new Harold Hill library. At the time of the district centre health check in October 2014, the proportion of vacant properties was found to be 14 units or 19.7% of the retail offer. This is significantly higher than the national average of 12.5% and is an area of concern.	
Retailer representation and intentions to change representation	For a district centre of its size there appears to be good representation of national multiple retailers. Convenience goods retailers include Iceland, Co-Operative Food and Sainsbury's Local. The convenience offer is represented by Superdrug, Boots and Boots Opticians. Furthermore, there are a number of national multiples offering banking services (Halifax, Santander and Natwest) in addition to bookmakers William Hill and Ladbrokes. It is however clear that the bulk of the retail offer within the centre is made up of independent retailers.	
Pedestrian flows	Pedestrian circulation within the district centre is generally good. Most of the retail units front Hilldene Avenue and Franham Road – the concentration of pedestrians is also highest in here. The centre is generally well laid out making navigation easy. However, the two arcades on the eastern and western sides of the town centre appear to be relatively underused.	
Accessibility	Accessibility to the centre is fairly good. Currently, four bus routes (including a night bus) serve Harold Hill district centre. The district centre seems to have adequate on-street parking for car users. The centre also has bicycle racks though the surrounding streets lacked bicycle lanes. While it is assumed that a number of shoppers would visit the centre on foot or by bus, it is important to note that a significant number of people live in the flats above the shops.	

Appendix: Harold Hill District Centre Health Check

PPG indicator	Summary for Harold Hill District Centre	Traffic light score
Perception of safety/ occurrence of crime	Perception of crime within the district centre is low. During the time of the visit the centre appeared to have significant footfall. While the centre does not have much of an evening economy, the presence of a residential night time population indicates that there is some evening activity and that occurrence of crime may be low though we have not had access to any local crime statistics. The only area of concern would be the two arcades. While the eastern arcade will benefit from the addition of the new library, the western arcade could potentially attract criminal activity.	
State of district centre environmental quality	The district centre is of relatively good environmental quality. The centre itself appears to have been developed as a comprehensive mixed-use scheme. The layout therefore allows for easy circulation and navigation while maximising visibility from Hilldene Avenue. In general the retail units appear suited for modern requirements. Some of the larger units have been sub-divided into smaller units which are likely to better suit local demand. As mentioned earlier the arcades are the main area of concern. While the eastern Arcade will benefit from the new library, the western arcade seems to suffer from high vacancy rates which degrade the overall character and appearance of the district centre.	

Appendix: Hornchurch District Centre Healthcheck

PPG indicator	Summary for Hornchurch District Centre	Traffic light score
Diversity of uses	Hornchurch District Centre is located in the centre of the Borough. The main shopping frontage is the High Street which runs through the town centre east to west. The other key retail frontages include Station Lane and North Street which both intersect with the High Street forming a major junction and gateway into the town centre. The centre has a good diversity of comparison, convenience and service retail uses as well as an impressive commercial leisure offer. The centre caters for day to day shopping needs as well as being a leisure destination for eating and drinking. The convenience offer is anchored by Sainsbury's supermarket located on the High Street. Approximately 25% of the floorspace is dedicated to comparison goods including home ware, DVD's, books and cards. The convenience offer is supplemented by an Iceland food store and a range of independent shops including general convenience stores, a bakery and butchers. There is a substantial comparison offer which accounts for 24% off all units (51 units) and is comprised of both independent stores and national multiple retailers. The centre also contains a good variety of local services including a DVLA driving centre, gym, dentists, solicitors, banks, Post Office, estate agents, betting office, opticians, travel agents and numerous hair and beauty salons. The centre has a high proportion of estate agents which account for 5% of all units. Hornchurch is largely seen as Havering's cultural centre and includes the Fairkytes Art Centre and the Queens Theatre. Commercial leisure uses account for a quarter of all units. The leisure offer which is focused on eating out comprises a bingo hall, a number of traditional pubs, bars, cafes and both national multiple outlets and independent restaurants. As such, the centre has a relatively active evening economy.	
Proportion of vacant street level property	The vacancy rate in Hornchurch was remarkably low at just 2% (equivalent to 5 out of 207 units) when the last GOAD survey was undertaken in August 2013. The vacancy rate had increased to 6% with a total of 12 vacant units when we undertook the town centre survey in October 2014. Despite the vacancy rate more than doubling over 14 months it remains well under the national average of 12.5%. Three of the five units which were vacant as of August 2014 have been re-occupied suggesting a strong uptake of smaller retail units. The former Waitrose store has remained vacant for the last 14 months suggesting a lack of interest in the centre by supermarket operators.	
Retailer representation and intentions to change representation	Within the comparison category, independent stores account for the majority of the units. National multiple retailers present include Superdrug, Boots, Argos, Shoe Zone, Peacocks and Clinton Cards. There are a high proportion of discount stores and charity shops within the centre which account for 22% off all the comparison units. The eating and drinking out offer is at the middle-to-higher end of the market. There is a range of high quality independently owned cafés and restaurants as well as national chain outlets including: Zizi, Ask, Prezzo, Starbucks, Costa and a JD Wetherspoon pub.	
Pedestrian flows	The flow of pedestrians moving East to West along the High Street is supported by the linear layout of the centre. The flow of pedestrians North to South however is constrained by the high volume of traffic moving along the High Street through the centre. The junction in the centre of the High Street also acts as a significant barrier to pedestrian access. Despite the introduction of pedestrian crossings it is difficult to navigate and poses a risk to pedestrian safety. Pedestrian footfall was relatively strong along the High Street with the greatest	

Appendix: Hornchurch District Centre Healthcheck

PPG indicator	Summary for Hornchurch District Centre	Traffic light score
	concentration of pedestrians around the junction of the High Street/North Street/Station Lane. Footfall along Station Lane was considerably weaker due to the low concentration of retail units and services.	
Accessibility	The centre is integrated into the wider London Transport Network via a range of public transport modes which connect Hornchurch to other centres and destinations in the Borough. Hornchurch underground station is a ten minute walk South of the centre and is served by the district line. Emerson Park rail station has fairly frequent services (every 30 minutes Monday to Saturday) to Romford and Upminster and is located an equal distance North of the centre. The centre is also served by seven bus routes (no's. 165, 193, 248, 252, 256, 370, 372) which connect the centre to Romford, Rainham, Thurrock, Lakeside shopping centre, Ockendon, Upminster, Elm Park and Harold Hill.	
Perception of safety/ occurrence of crime	There is generally a very low perception of crime within the centre. The majority of properties are occupied providing active frontages and appear well maintained. The high concentration of evening leisure uses ensure that the centre is well used throughout the evening and the associated natural surveillance reduces the perception of crime. The only areas of concern include the Mecca Bingo car park, this area has limited natural surveillance and the presence of CCTV cameras gives a reduced perception of safety. The other area of concern is the route from Hornchurch Station to the town centre. There is limited natural surveillance along much of this route since the frontage is made up of residential properties interspersed with retail units sets back from the main path which create inactive frontages.	
State of town centre environmental quality	The environmental quality of the centre is generally very good. The buildings and shop fronts along the main retail frontages are well maintained and on the site visit there was very little litter. There is evidence of significant investment in new paving, street furniture and traffic calming measures funded by Transport for London in order to improve the environmental quality for pedestrians. There is also evidence of private sector investment. A number of key properties fronting onto the main junction have been redeveloped mainly for leisure uses with new residential use above. The centre contains a mix of architectural styles. The restaurant units on North Street occupy small thatch cottages which represent the oldest buildings in the centre.	

Appendix: Rainham District Centre Health Check

PPG indicator	Summary for Rainham District Centre	Traffic light score
Diversity of uses	Rainham is classified as a District centre. There is a low diversity of use at the centre. The Tesco Extra is the principal attraction in the centre. The large supermarket is open 24 hours a day 6 days a week. The services offered in the supermarket include a café, a pharmacy, photo shop, an optician, a filling station, a car wash and a bureau de change. In addition to selling a wide variety of convenience goods, the supermarket also contains extensive clothing, electronics and home goods section. Tesco's Click and Collect service is also available from this store. The supermarket effectively offers many of the services that would traditionally occupy the district centre. The district centre does not contain significant retail developments except for a small number of convenience shops, a footwear shop, and a second hand furniture store. The rest of the units are dedicated to service provides including Barclays Banks, bookmakers, a funeral home, letting agents and an optician. There are also a number of hot food take-aways and a handful of pubs and restaurants. The cultural offer in Rainham is restricted to the historic sites and museums around the town centre including Rainham Hall and the Church of St Helen and St Giles. There are no cinemas or theatres. Similarly, the evening economy is dominated by a handful of pubs.	
Proportion of vacant street level property	There were no Experian Goad surveys produced for Rainham district centre. At the time of the survey in September, there were six vacant units, mostly along Upminster Road. This translates into a vacancy rate of 14.2%. The concentration of vacant units along Upminster Road is a source of concern as it is visibly affecting the rest of the town centre.	
Retailer representation and intentions to change representation	Tesco is the district's main national multiple retailer. Other national chains present are Pizza Hut, Barclays and Coral Betting. The rest of the retail offer is accounted for by independent retailers.	
Pedestrian flows	The district centre is small and compact. Pedestrian circulation is therefore relatively easy and is aided by overhead directional signs. As the town has retained its historic character walking is fairly pleasant and is marked by various local landmarks such as Church of St Helen and St Giles, the Rainham War Memorial and the new Library. There is a direct pedestrian link between the main shopping frontage along Upminster Road the Tesco Extra which makes pedestrian circulation around the centre easier. At the time of the visit pedestrian activity within the town centre was generally low. The Tesco however seemed to have fairly high customer activity. This in part could be due to the relatively low retail diversity within the town centre compared to the Tesco. The presence of the Tesco may imply that a high proportion of visitors to the centre do so by car.	

Appendix: Rainham District Centre Health Check

PPG indicator	Summary for Rainham District Centre	Traffic light score
Accessibility	Rainham is on the mainline train service from London's Fenchurch Street Station to Southend. The town centre is in Zone Six of the London Travel Zone. The town is served by four bus routes. The train station is close to the town centre is opposite the new Rainham Library which marks the entry way to the district centre. While the district centre is small, there are way-finding directional signs that point out specific historic sites within the town centre. The bulk of the town centre's parking provision is at the Tesco supermarket with a small council owned parking facility next to it. Rainham Station also has a small NPC-managed car park. On street parking is available along Upminster Road.	
Perception of safety/ occurrence of crime	The perception of crime was assessed to be low during the day time. While some parts of the town centre such as Broadway Road may be active during the evenings due to the presence of two pubs, we envisage that the rest of the town centre with the exception of the Tesco has little night time activity. The lack of a significant evening economy therefore diminishes the perception of safety at night.	
State of town centre environmental quality	The district centre can broadly be considered to be of good quality. The historic setting of the town has been preserved and enhanced with such civic buildings as the new Rainham Library. There is comparatively little traffic congestion and noise levels are low. The architectural diversity in the centre has been well preserved. The Grade 1 listed Church of St Helen and St Giles and Rainham Hall define Rainham's townscape and act as strong focal points for the district centre. This is further enhanced by the open green space surrounding these buildings. More recently there have been public realm improvements at the corner of Broadway and Upminster roads resulting in a new public space centred on the Rainham War Memorial. These improvements include new paving and benches. While there are a number of well-preserved buildings in the district centre (specifically along Broadway), the empty shop units on Upminster Road diminish the attractiveness of the district centre.	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
Diversity of uses	Romford is the principle shopping and leisure destination in the Borough of Havering. There is a strong comparison and convenience retail offer. Romford can therefore be considered to have a good diversity of uses. In many respects Romford can be considered to serve shopping needs of the Borough's residents and indeed residents from the surrounding area reflecting its designation as a Metropolitan Centre in the London Plan. While there is a strong comparison goods focus within the town centre, Romford also includes a number of convenience goods outlets as well. The town centre is hemmed in by a network of roads that include Waterloo Road, St Edwards Way, Mercury Gardens and Thurloe Gardens. Due to the network of ring roads around the centre and the size of the main retail area, Romford town centre seems to function as four distinct centres with the central retail core encompassing the primary retail frontage and, London Road, North Street and the area south of the railway viaduct (including South Street/ Victoria Road/ Atlanta Boulevard) acting as neighbourhood shopping centres. While the quality of retail in the town centre core is generally high, the quality begins to fall around the edge of centre sites. The council continues to try and improve on Romford's leisure provision. In general there is good retailer representation from most mid-level national multiple retailers. The town centre features two cinema complexes a number of restaurants, drinking establishments, gyms and a growing number of cafes. The central core area is anchored by a number of shopping centres namely the Brewery, the Mercury, and the Liberty. In addition the town centre also encompasses a shopping arcade – the Quadrant Arcade and the Romford Shopping Hall. The two shopping centres, the Mercury and the Liberty act as the town centre's primary retail pitch. The two shopping centres are connected to each other through a pedestrian subway underneath Mercury Gardens. The retail mix at the Liberty almost exclusively consists of comparison goods and is generally of higher quality than the Mercury. Generally, the retail offer at the Liberty consists of mid-range, national multiple retailers including BHS, Marks and Spencer, Topman/ Topshop, H&M and Swarovski. The Mercury has a strong emphasis on comparison goods but also includes a large Asda supermarket and Poundland as well as home goods retailers such as Tiger and Wilco. The Mercury also hosts a cinema complex and a bingo hall. The Brewery is a fairly recent development containing large format retail and leisure uses. The development is anchored by a large Sainsbury's supermarket offering a wide range of both convenience goods and comparison goods (TV's Toys, Clothing etc.), a large gym, restaurants and other shops including Mamas & Papas, Gap, Boots and Carphone Warehouse. The leisure offer includes a cinema and two children's amusement arcades. There is a marked change in the quality of retail in the peripheral areas surrounding the Brewery i.e. the North Western portion of the town centre. This area around the High Street is designated as a secondary retail frontage is dominated mainly by local retailers and includes, a Salvation Army charity shop, dry cleaners, an Afro-Caribbean convenience shop and hair salons. This is similarly mirrored in the area around London Road. In this shopping area in particular, the London Road effectively disconnects this area from the rest of the prime shopping pitch. The parade of shops along London Road which include a number of hot food take away establishments, car and motorcycle dealerships and a pub effectively function as a neighbourhood centre. The main convenience goods retailers in the town centre are Asda, Sainsbury's, Iceland, and Aldi with Lidl anchoring the Southern portion of the town centre boundary. Romford Market has historically played a significant part in the historical development of the town and continues to do so today. Currently the market operates three days a week within Market Place. Initial talks with market stall holders seem to suggest that the market is in decline. The number of stall holders seems to be falling partly due to competition from discount retailers (Aldi, Iceland and the 99p Store have a presence in Market Place) and changing consumer shopping habits. Presently, the market offers a fairly wide range of products including fresh fruit and vegetables, clothing, jewellery, toys and other specialty items. As mentioned earlier, the peripheral shopping areas tend to act as neighbourhood shopping zones. The area around North Street (towards the North East of the town centre boundary) is generally made up of a parade of small shops that include hot food take-aways and convenience shops. The	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
	street also includes a large Matalan and a recently opened Sainsbury's Local. In general there does North Street does seem to have an overprovision of take away establishments. This is similarly echoed in the shopping area along London Road where the quality of retail and eating establishments are generally of a lower quality. These areas therefore have a largely secondary role and function. The area south of the railway viaduct appears to function independently from the primary retail core. The area falls within the town centre boundary with much of it designated as a secondary retail frontage. Anchor stores in the area include a fairly large Lidl and a Fitness First. Unlike the retail core, the retail offer consists mainly of independent, locally owned shops with the offer consisting primarily of convenience shops, restaurants and a number of hot food take-aways. This is particularly apparent around Victoria Road. In general all Supermarkets with the exception of Iceland seemed fairly busy during the time of the town centre visit. The Asda and Sainsbury's in particular had a wide variety of comparison goods on sales which included clothing and televisions. The food and retail offer appears to adequately serve Romford's comparison and convenience needs. There is an under-provision of cultural amenities in the town centre with the exception of the Havering Museum. Fast links to Central London perhaps means that expenditure on cultural and leisure amenities (such as theatres) is spent in Central London. The proliferation of discount shopping chains (Poundland, 99p Stores) some of which have more than one town centre location is a source of concern which might need to be monitored.	
Proportion of vacant street level property	The most recent Experian Goad Survey undertaken in January 2014 identified a total of 41 vacant units which was the equivalent of 7.6% vacancy rate of the total retail offer. At the time of our visit in September 2014 this figure stood at 37 units or 6.9% of the retail offer. There is therefore a decrease in the number of vacant units within the town centre itself and the surrounding retail areas. It is important to note that a number of retail units along Swan Walk while vacant are currently under renovation. This is the only significant concentration of vacant retail units. At the same time individual retail units within the Romford Shopping Hall were not counted though at the time of the visit the shopping hall seemed to be trading quite well. New retailers within this area that took up vacant properties include Home Bargains in Market Place and Sainsbury's along North Street. Other units have become vacant on account of the national chains entering administration, a recent example of this being the fashion retailer La Senza. Other vacant units were taken up by independent retailers within the town centre. This level of churn is not uncommon in any centre. In general the vacant units within the town centre have varied in size from a large restaurant unit within the Brewery and a three story building within Market Place to smaller units around the town centre.	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
Retailer representation and intentions to change representation	Romford town centre enjoys good national multiple retailer representation. The central retail core includes several anchor stores offering a typical High Street mix of shops. At the Brewery key retailers present include a Sainsbury's Supermarket, The Range, Boots, 99p Store, Mamas and Papas, Gap and JD Sports. This is addition to commercial leisure brands such as Virgin Active, Vue Cinemas and Namco Funscapes. Dining options at the Brewery also include Zizzi, Nandos, Pizza Express, McDonalds and Frankie & Benny's. The offer at the Brewery is therefore aimed at a mid-market clientele. At the Liberty Centre, there is an emphasis on a fashion-oriented shopping mix. Retailers present include River island, Primark, Marks and Spencer, BHS, Sports Direct, HMV, Debenhams, New Look, Topman/ Topshop, H&M, Anne Summers and Superdry. Other retailers include Office, Swarovski, Ernest Jones, Accessorize, the Carphone Warehouse, Holland and Barrett and GNC. In addition there is a travel agent (Flight Centre), newsagents (WH Smith) and a hair salon (Supercuts) within the centre. The Mercury Shopping Centre is directly connected to the Liberty via an underground tunnel. The Mercury appears to have a much greater representation of independent retailers than the other two shopping centres. The retail offer is also slightly more down market than then other two retailers. Retail floorspace is dominated by the large Asda supermarket. Other retailers present include Wilkinson, Poundland, Game, Superdrug, Peacock, Blue Inc, Tiger, Warren James Jeweller and Thompson Travel. The centre also has fast food representation from McDonalds and Subway and a Toni & Guy hair salon. Independent retailers include home furnishing shops, a pawn broker and cafes. Elsewhere within the primary shopping frontage, there appears to be greater proportion of independent retailers than the shopping centres. However, there are still a number of national multiples. Retailers located around Market Place include, Iceland, Argos, and the 99p Store. The area around South Street includes, Tesco Express, Thompson Travel, Ladbrokes, Coral Betting, McDonalds. South Street is alos the location of a number of banks and financial service institutions including HSBC, Santander, NatWest, Halifax, Barclays, Nationwide, The Royal bank of Scotland and Lloyds. From our general observations, the retail units appeared to be flexible and cater for the different retail needs within Romford. This includes large stores for supermarket chains and department stores, to small shop units within the Romford Shopping Hall that catered to independent retailers.	
Pedestrian flows	Pedestrian circulation within the town centre is generally good. The majority of the primary retail frontage benefits from being located with a pedestrianized shopping area or a covered shopping centre/ arcade. The pedestrianized shopping zone is generally of good quality and provides an attractive setting for sopping activity. The market area in particular looked vibrant and appeared to have high pedestrian footfall. The Brewery, Parts of the Mercury and The Liberty appeared to all have a high volume of pedestrian activity moving through it. During market days, Market Place also seems to be a popular and well used civic space However, the network of ring roads surrounding the central retail core continues to act as a barrier, effectively cutting off the centre from the surrounding residential areas.	
Accessibility	Romford town centre is highly accessible from various locations within the borough as well as Central London and the surrounding region. Romford station is located within the town centre boundary and falls under Zone 6 of the London Travel Zone. The station is located on the Shenfield – London Liverpool Street railway line. There are frequent train services to Upminster, Southend and Colchester. Romford Station will also be served by Crossrail when services begin in 2018 and will connect the town to Shenfield to Reading via Central London. There are regular bus services linking Romford town centre to the surrounding areas. The town centre is collectively served by 24 bus routes (including night busses) linking Romford to the main	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
	town centres in the borough, East London and Central London. A bus interchange is located next to the train station in addition to several bus stops located around the town centre. The provision for car parking within the and around the town centre appears to be quite high. In total there are 13 public car parks within or on the edge of Romford town centre. The largest of these car parks is the Brewery car park with over 1,700 car parking spaces. The Mercury and the Liberty also offer large car parks. The council owns eight of the public car parks. On-street pay and display car parking is also provided in the surrounding streets.	
Perception of safety/ occurrence of crime	Generally, the perception of crime within the town centre is low. The town centre appeared to be clean and there was no evidence of graffiti or vandalism. The presence of cafes, bars, nightclubs and restaurants around the primary frontage suggests a fairly strong and active evening economy. This reduces the perception of crime and encourages night time visitors to the centre. However, some parts of the town centre are perhaps more vulnerable to crime than others. Such areas include the car park area adjacent to Angel Way and the northern part of North Street. The network of pedestrian underpasses while fairly well maintained were also a source of concern, especially at night.	
State of town centre environmental quality	The town centre is generally inward looking due to the high levels of traffic that flow along the perimeter of the town centre - most notably along St Edwards Way and Mercury Gardens. The town centre is generally of reasonable quality and appearance though the quality varies from one part of the town centre to another. The central retail core (including the Primary retail Frontage, the Brewery, the Mercury and the Liberty) are areas of fairly high architectural quality. The Council has undertaken a programme of public realm improvement works that have enhanced the appearance of certain parts of the town centre such as Market Place and more recently, Victoria Road and South Street. This has included new paving and street furniture. The town centre is generally inward looking due to the high levels of traffic that flow along the perimeter of the town centre - most notably along St Edwards Way and Mercury Gardens. As a historic market town, Romford has good architectural diversity. While some newer developments such as the Brewery could perhaps be better integrated with the urban fabric many historic buildings occupy prominent positions within the town centre. These include the Havering Museum and St Edward the Confessor Church within Market Place. This coupled with the pedestrianized nature of the main shopping streets makes the town centre an enjoyable place to visit for the most part. Some areas of concern include, the abandoned building site at the end of North Street generally brings down the quality of the town centre while perhaps encouraging anti-social behaviour. The same can be said of the car park behind the Salvation Army charity shop. While the car park is still in use, its location could potentially be redeveloped so as to introduce life and vitality into the north western part of the town centre. While improvements have been made to make the circulation of pedestrian easier and more pleasurable, there is a lack of significant green space within the centre. A comprehensive landscaping scheme may improve the town centre quality particularly around the South Street/ Victoria Road junction.	

Appendix: Upminster District Centre Healthcheck

PPG indicator	Summary for Upminster District Centre	Traffic light score
Diversity of uses	Upminster centre is located in the south east of the Borough. The main shopping frontage is Station Road/Corbets Tey Road (B1421). Other key retail frontages include St. Marys Lane and Springfield Gardens which both run East off the B1421. The centre has a good diversity of comparison, convenience and service retail uses which cater for the day to day shopping needs of residents. The centre also has good range of both public and commercial leisure uses. The centre has a diverse convenience offer including both high end and budget food stores. There are two supermarkets (Waitrose and Aldi) supplemented by an Iceland food store, Marks and Spencer simply food store and a range of independent shops including general convenience stores, a bakery and butchers. There is a range of local services and facilities including estate agents, dry cleaners, petrol station, opticians and numerous hair/beauty salons. There is a substantial comparison offer which accounts for 25% of all units. This is comprised of mainly local independent retailers with very few national multiple retailers. There is a concentration of charity shops and discount stores which represent 5% of all units. The centre has a good range of public and commercial leisure uses including a leisure centre, Upminster Park, numerous pubs, restaurants and cafes.	
Proportion of vacant street level property	The vacancy rate in Upminster was low by national standards at just 5% when the last GOAD survey was undertaken in August 2013. The vacancy rate had increased to 7% with a total of 14 vacant units when we undertook the town centre survey in October 2014. Despite the increased vacancy rate it remains well under the national average of 12.5%.	
Retailer representation and intentions to change representation	Within the comparison retail category independent stores account for the majority of the units. The only National Multiple comparison retailers present include Clarks and Boots. The national multiple convenience retailers present include Marks and Spencer, Waitrose, Aldi and Iceland. The eating and drinking offer is positioned in the middle of the market and is comprised of a mix of independently owned cafés and restaurants as well as National chain outlets including Costa, Café Nero, Prezzo, Pizza Express, Subway and Greggs.	
Pedestrian flows	Pedestrian footfall was relatively week along some sections of Station Road/Corbets Tey Road. Pedestrian footfall was strongest along the northern end of the B1421 around the station and along the section of the B1421 opposite Upminster Park where complimentary leisure/transport functions create increased lingering time. Pedestrian footfall was very weak along Marys Lane and Springfield Gardens, these streets have a low concentration of retail uses and are surrounded by primarily residential uses.	
Accessibility	The flow of pedestrians moving north to south along the B1421 is supported by the linear layout of the centre. The flow of pedestrians moving between each side of the road is significantly constrained by heavy traffic. Although there are pedestrian crossings, these are controlled by traffic lights which prioritise the flow of vehicular traffic. The lower section of the B1421 opposite Upminster Park is more accessible and safer for pedestrians due to the presence of on street car parking and pedestrian priority crossings. Upminster centre is well integrated into the wider London transport network via a range of public transport modes which connect it to other centres and destinations in the Borough. Upminster train station is located along Station Road at the northern end of the centre. The station is served by the District Line and train services also run in to London Fenchurch Street Station approximately every 10 minutes. The centre is also served by four bus routes	

Appendix: Upminster District Centre Healthcheck

PPG indicator	Summary for Upminster District Centre	Traffic light score
	(no's. 248, 346, 347, 370) which connect the centre to Romford, Lakeside shopping centre, Hornchurch, Cranham and Corbets Tay.	
Perception of safety/ occurrence of crime	There is generally a very low perception of crime within the centre. The majority of units along all three retail frontages are occupied providing active frontages which appear well maintained. There was little evidence to suggest the occurrence of crime when we undertook the site visit. We did not record any broken windows or similar vandalism and CCTV was not prominent throughout the centre.	
State of town centre environmental quality	The environmental quality of the centre is generally good. The main shopping streets were relatively free of litter on our site visit. Corbets Tey Road (B1421) is an attractive shopping parade, with coordinated street furniture including and planting. Station Road (B1421) is also an attractive shopping parade and there is evidence of recent private sector investment in the centre. The retail units at the northern end of Station Road occupied by Marks and Spencer's simply food and M&Co fashion store are both examples of recent developments. The centre contains a broad mix of architectural styles and types of building which give the centre a unique character. Buildings of note include Trinity United Reform Church, the old Upminster school building, the Phancem Pharmacy building on St. Marys Lane and the building at the junction of Corbets Tey Road and St. Marys Road.	

A.1 Experian Goad Town Centre Boundaries

Collier Row


HAMPDEN ROAD
CLOCKHOUSE LANE
CHASE CROSS ROAD
CARTER DRIVE
COLLIER ROW ROAD
COLLIER ROW LANE
REX CLOSE
MELVILLE ROAD

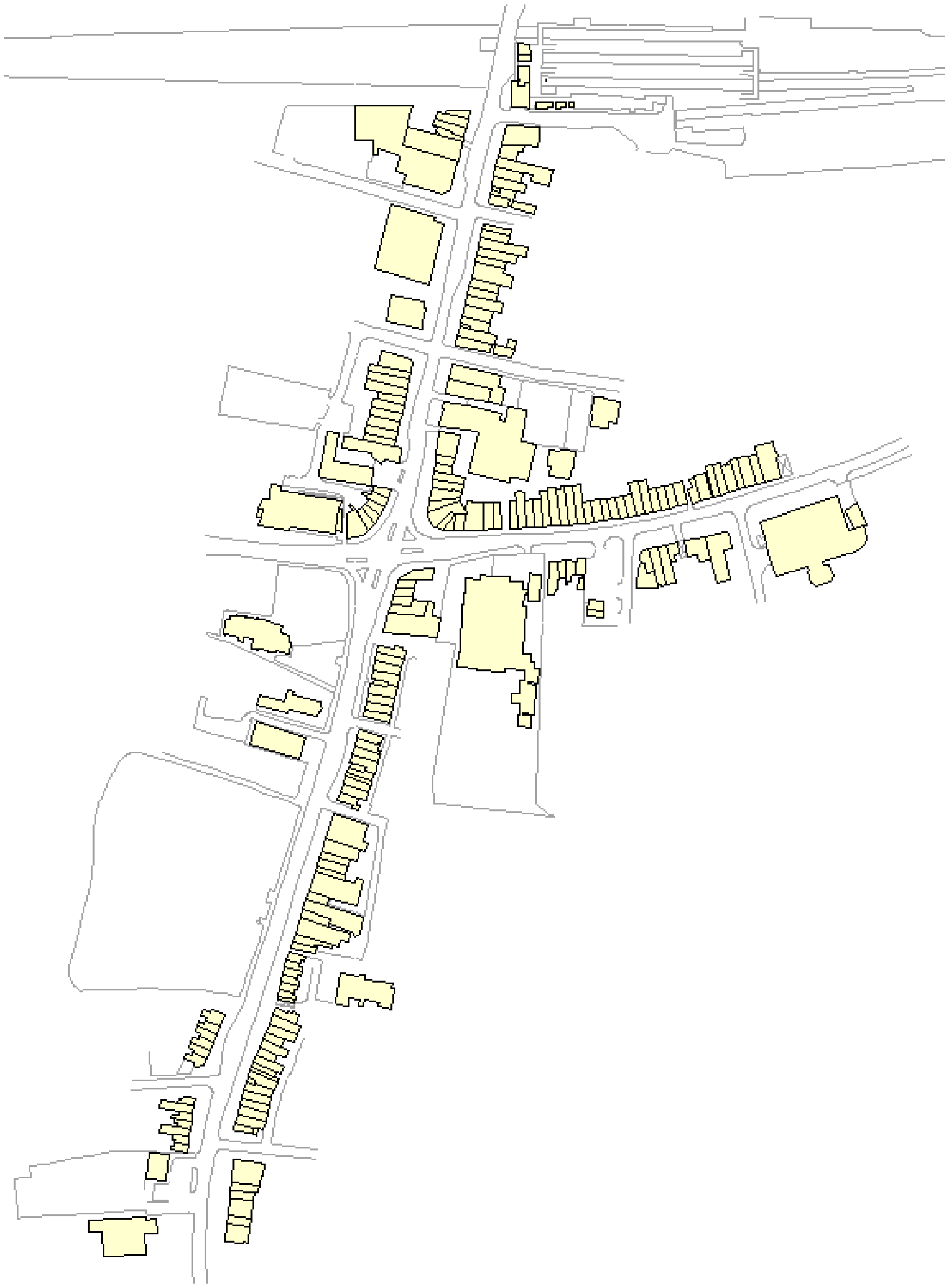
Harold Hill


HILLDENE AVENUE
FARNHAM ROAD
THE ARCADE
THE ARCADE
EAST DENE DRIVE
WEST DENE DRIVE
CHIPPENHAM ROAD
DARTFIELDS

Hornchurch

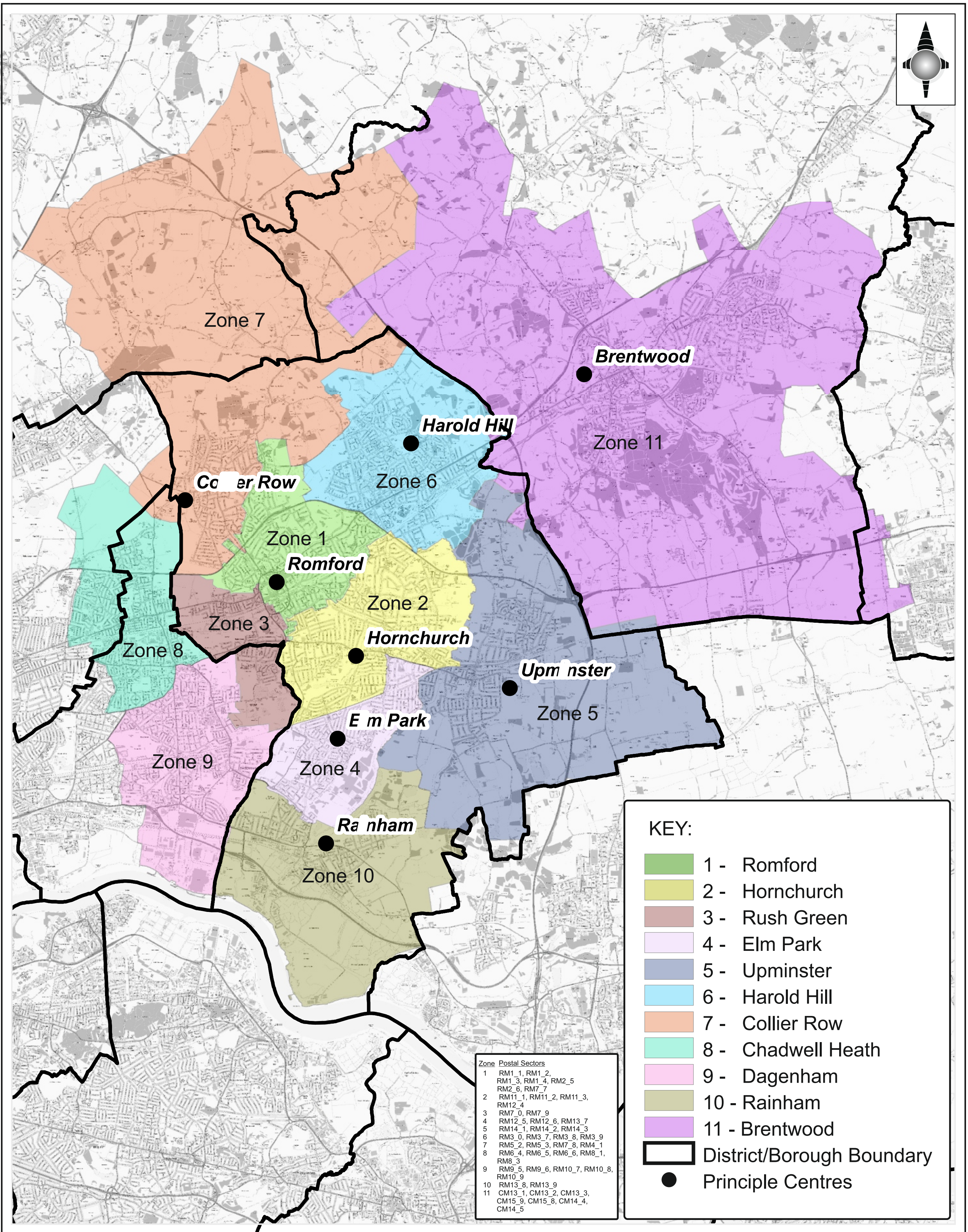
Romford

Upminster



Note: no Experian Goad plans are available for the centres of Elm Park or Rainham

Appendix B Study Area Map



Zone	Postal Sectors
1	RM1_1, RM1_2, RM1_3, RM1_4, RM2_5 RM2_6, RM7_7
2	RM11_1, RM11_2, RM11_3, RM12_4
3	RM7_0, RM7_9
4	RM12_5, RM12_6, RM13_7
5	RM14_1, RM14_2, RM14_3
6	RM3_0, RM3_7, RM3_8, RM3_9
7	RM5_2, RM5_3, RM7_8, RM4_1
8	RM6_4, RM6_5, RM6_6, RM8_1, RM8_3
9	RM9_5, RM9_6, RM10_7, RM10_8, RM10_9
10	RM13_8, RM13_9
11	CM13_1, CM13_2, CM13_3, CM15_9, CM15_8, CM14_4, CM14_5

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Client

London Borough of Havering

London Borough of Havering Retail & Commercial Leisure Study

Survey Area and Zones

Mark	Revision	Drawn	Date	Chk

Date	16.09.2014
Scale	NTS
Drawn by	ZR
Checked by	AB

J:\30904 Havering Retail Study\COREL

Appendix C Retail Capacity Tables

Table CM1 —
Population projections

	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	**429,288**	**442,231**	**462,169**	**488,678**	**520,315**	**536,975**	**547,846**	**105,615**

Notes
Source: Experian MMG3 (2012), for base year and population projections
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CM2 —
Per capita expenditure on comparison goods

	2012	2014	2017	2021	2026	2029	2031
	£	£	£	£	£	£	£
Zone 1	3,015	3,236	3,678	4,156	4,889	5,389	5,750
Zone 2	3,487	3,742	4,253	4,806	5,653	6,231	6,649
Zone 3	2,590	2,779	3,159	3,569	4,198	4,628	4,938
Zone 4	3,010	3,231	3,672	4,149	4,880	5,380	5,741
Zone 5	3,595	3,858	4,385	4,954	5,828	6,424	6,855
Zone 6	2,399	2,574	2,926	3,306	3,888	4,286	4,574
Zone 7	3,094	3,320	3,774	4,264	5,016	5,529	5,900
Zone 8	2,231	2,394	2,721	3,075	3,617	3,987	4,254
Zone 9	1,927	2,068	2,351	2,656	3,124	3,444	3,675
Zone 10	2,710	2,908	3,306	3,735	4,393	4,843	5,168
Zone 11	3,695	3,965	4,507	5,093	5,990	6,603	7,046

Notes
The following expenditure growth rates are applied (source: Experian Retail Planne
Briefing Note 12, October 2014, Figures 1a and 1b)

2012-13:	2.60%	
2013-14:	4.60%	
2014-15:	5.60%	
2015-16:	4.40%	
2016-17	3.10%	
2017-21:	3.10%	(per annum)
2020-31:	3.30%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices)
All monetary values held constant at 2012 prices

Table CM3 —
Total comparison goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	126.31	149.18	177.44	221.63	252.09	274.54
Zone 2	184.22	217.52	258.71	323.04	367.27	399.87
Zone 3	47.89	57.05	68.38	85.90	97.81	106.55
Zone 4	92.55	109.16	129.68	161.73	183.76	199.99
Zone 5	107.88	127.48	151.68	189.52	215.46	234.55
Zone 6	107.48	127.02	151.20	188.97	214.99	234.18
Zone 7	104.13	122.96	146.20	182.51	207.54	225.99
Zone 8	144.03	174.11	211.07	267.44	305.17	332.67
Zone 9	136.72	165.43	200.68	254.25	290.04	316.14
Zone 10	59.98	70.90	84.39	105.49	120.09	130.84
Zone 11	238.38	278.63	327.47	403.70	456.67	495.22
Total	**1,349.59**	**1,599.43**	**1,906.91**	**2,384.17**	**2,710.89**	**2,950.55**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2029	2031
SFT rate	11.70%	14.00%	15.90%	15.90%	15.70%	15.50%
	£m	£m	£m	£m	£m	£m
Zone 1	14.78	20.88	28.21	35.24	39.58	42.55
Zone 2	21.55	30.45	41.13	51.36	57.66	61.98
Zone 3	5.60	7.99	10.87	13.66	15.36	16.52
Zone 4	10.83	15.28	20.62	25.72	28.85	31.00
Zone 5	12.62	17.85	24.12	30.13	33.83	36.36
Zone 6	12.58	17.78	24.04	30.05	33.75	36.30
Zone 7	12.18	17.21	23.25	29.02	32.58	35.03
Zone 8	16.85	24.38	33.56	42.52	47.91	51.56
Zone 9	16.00	23.16	31.91	40.43	45.54	49.00
Zone 10	7.02	9.93	13.42	16.77	18.85	20.28
Zone 11	27.89	39.01	52.07	64.19	71.70	76.76
Total	**157.90**	**223.92**	**303.20**	**379.08**	**425.61**	**457.34**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	111.53	128.29	149.23	186.39	212.51	231.99
Zone 2	162.67	187.06	217.57	271.68	309.61	337.89
Zone 3	42.29	49.07	57.51	72.24	82.46	90.03
Zone 4	81.72	93.88	109.06	136.02	154.91	168.99
Zone 5	95.26	109.63	127.56	159.39	181.64	198.20
Zone 6	94.91	109.23	127.16	158.92	181.24	197.88
Zone 7	91.95	105.75	122.96	153.49	174.96	190.96
Zone 8	127.18	149.74	177.51	224.91	257.26	281.11
Zone 9	120.72	142.27	168.77	213.82	244.50	267.14
Zone 10	52.96	60.97	70.97	88.72	101.23	110.56
Zone 11	210.49	239.62	275.40	339.51	384.97	418.46
Total	**1,191.69**	**1,375.51**	**1,603.71**	**2,005.09**	**2,285.28**	**2,493.22**

Notes
Source: Table CM1, Table CM2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping

All monetary values are held constant at 2012 prices

Table CM4 —
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 (incl 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 (incl. 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 CM5 —

Comparison goods spending patterns, 2014

	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	*111.53*	*162.67*	*42.29*	*81.72*	*95.26*	*94.91*	*91.95*	*127.18*	*120.72*	*52.96*	*210.49*	*1,191.69*
Zone 1												
Romford town centre	66.94	50.79	23.55	23.26	10.30	37.27	47.09	57.05	35.27	8.31	14.11	373.93
Gallows Corner Retail Park, Romford	6.23	8.67	2.05	1.53	1.91	15.22	9.24	2.20	1.76	0.18	7.70	56.69
Eastern Avenue Retail Park, Romford	4.36	11.07	2.84	1.24	0.63	2.74	10.55	2.52	1.05	0.00	0.76	37.76
Other retail parks, Romford	2.24	7.20	2.98	4.08	1.22	1.01	1.98	6.29	1.31	0.57	1.33	30.21
Other locations, zone 1	1.01	1.15	0.00	0.70	0.65	0.74	1.99	0.00	0.00	0.09	0.00	6.33
Sub-total, survey zone 1	**80.78**	**78.87**	**31.41**	**30.81**	**14.71**	**56.99**	**70.85**	**68.06**	**39.40**	**9.15**	**23.90**	**504.91**
Zone 2												
Hornchurch	2.07	13.13	0.47	7.78	4.00	1.73	0.76	0.20	0.12	0.95	1.00	32.21
Other locations, zone 2	1.90	3.79	0.93	1.31	1.70	2.53	1.36	1.05	0.34	0.18	2.29	17.38
Sub-total, survey zone 2	**3.97**	**16.92**	**1.41**	**9.09**	**5.70**	**4.27**	**2.12**	**1.24**	**0.46**	**1.13**	**3.29**	**49.59**
Zone 3												
All locations, zone 3	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.57	0.81	0.00	0.00	1.52
Sub-total, survey zone 3	**0.00**	**0.00**	**0.13**	**0.00**	**0.00**	**0.00**	**0.00**	**0.57**	**0.81**	**0.00**	**0.00**	**1.52**
Zone 4												
Elm Park	0.00	0.44	0.00	1.93	0.12	0.00	0.00	0.32	0.00	0.05	0.00	2.85
Other locations, zone 4	0.00	0.06	0.00	0.78	0.22	0.00	0.00	0.00	0.00	0.00	0.00	1.07
Sub-total, survey zone 4	**0.00**	**0.50**	**0.00**	**2.71**	**0.34**	**0.00**	**0.00**	**0.32**	**0.00**	**0.05**	**0.00**	**3.92**
Zone 5												
Upminster	2.11	1.47	0.24	2.27	14.36	1.90	1.08	0.67	0.13	0.49	2.88	27.59
All locations, zone 5	0.00	0.00	0.00	0.00	0.70	0.16	0.00	0.00	0.44	0.00	0.00	1.30
Sub-total, survey zone 5	**2.11**	**1.47**	**0.24**	**2.27**	**15.07**	**2.06**	**1.08**	**0.67**	**0.57**	**0.49**	**2.88**	**28.89**
Zone 6												
Harold Hill	0.06	0.40	0.03	0.02	0.33	3.02	1.07	0.00	0.27	0.02	0.06	5.28
Tesco Extra, Bryant Avenue, Romford	5.27	1.49	0.27	0.13	0.13	2.91	2.87	0.14	0.00	0.00	0.36	13.56
Other locations, zone 6	0.00	0.00	0.00	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.55	1.44
Sub-total, survey zone 6	**5.33**	**1.89**	**0.30**	**0.15**	**0.46**	**6.81**	**3.93**	**0.14**	**0.27**	**0.02**	**0.96**	**20.27**
Zone 7												
(No centres)												
Zone 8												
Goodmayes (incl Tesco Extra, retail parks)	0.02	1.36	0.16	0.05	0.00	0.14	0.11	8.08	0.87	0.00	0.00	10.79
Other locations, zone 8	0.76	0.90	0.71	0.21	0.00	0.00	0.67	8.48	2.89	0.00	0.00	14.60
Sub-total, survey zone 8	**0.78**	**2.26**	**0.86**	**0.26**	**0.00**	**0.14**	**0.78**	**16.55**	**3.75**	**0.00**	**0.00**	**25.39**
Zone 9												
Dagenham	0.17	0.07	0.98	1.84	0.00	0.27	0.00	6.30	29.50	1.07	0.00	40.20
Other locations, zone 9	0.00	0.02	0.00	0.08	0.00	0.00	0.00	0.06	0.83	0.00	0.00	0.99
Sub-total, survey zone 9	**0.17**	**0.09**	**0.98**	**1.92**	**0.00**	**0.27**	**0.00**	**6.36**	**30.32**	**1.07**	**0.00**	**41.19**
Zone 10												
Rainham (incl. Tesco Extra)	0.00	0.12	0.00	3.24	0.99	0.47	0.00	0.20	0.75	8.58	0.54	14.90
Sub-total, survey zone 10	**0.00**	**0.12**	**0.00**	**3.24**	**0.99**	**0.47**	**0.00**	**0.20**	**0.75**	**8.58**	**0.54**	**14.90**
Zone 11												
Brentwood	0.74	0.05	0.10	0.09	1.54	1.78	0.00	0.65	0.00	0.04	80.79	85.76
Other locations, zone 11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.87	3.87
Sub-total, survey zone 11	**0.74**	**0.05**	**0.10**	**0.09**	**1.54**	**1.78**	**0.00**	**0.65**	**0.00**	**0.04**	**84.66**	**89.63**
Total for survey area	**93.87**	**102.18**	**35.42**	**50.54**	**38.79**	**72.79**	**78.75**	**94.78**	**76.34**	**20.53**	**116.22**	**780.22**
Outside survey area												
Lakeside	10.60	43.32	4.38	24.59	46.76	15.12	7.29	10.47	28.54	30.49	39.44	261.01
Central London / West End	1.74	5.30	0.22	2.47	1.78	1.43	1.50	4.98	1.91	0.44	0.88	22.65
Basildon	0.00	0.00	0.12	0.71	0.49	0.04	0.23	0.42	0.07	0.00	24.77	26.85
Stratford (incl Westfield Stratford City)	1.46	1.00	0.28	0.77	1.06	1.57	0.38	4.14	1.72	0.14	6.27	18.80
Bluewater	0.20	4.31	0.60	0.58	4.47	1.31	0.84	0.00	0.68	0.08	6.03	19.11
Ilford	0.51	2.08	0.44	0.39	0.38	0.12	1.81	9.99	1.99	0.27	0.00	17.99
Chelmsford	0.35	0.00	0.08	0.00	0.00	1.63	0.00	0.00	0.00	0.00	10.42	12.47
Beckton (superstores/ retail parks)	0.00	1.52	0.11	0.59	0.00	0.35	0.00	0.93	3.66	0.06	0.00	7.22
Barking	0.03	0.00	0.00	0.87	0.00	0.04	0.00	0.21	0.79	0.14	0.00	2.08
Other locations outside survey area	2.77	2.97	0.63	0.21	1.51	0.50	1.15	1.27	5.01	0.82	6.46	23.30
Total for outside survey area	**17.66**	**60.49**	**6.87**	**31.18**	**56.46**	**22.12**	**13.20**	**32.40**	**44.38**	**32.43**	**94.27**	**411.47**
Overall total	**111.53**	**162.67**	**42.29**	**81.72**	**95.26**	**94.91**	**91.95**	**127.18**	**120.72**	**52.96**	**210.49**	**1191.69**

Notes
Source: Table CM3, CM4

Table CM6 —

Comparison goods floorspace requirements to 2031

Basline requirement

		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total comparison goods expenditure (£m)	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	52%	52%	52%	52%	52%	52%
D	Retained comparison goods expenditure in LB Havering (£m)	624.01	720.27	839.76	1049.93	1196.65	1305.53
E	Comparison goods expenditure leakage (£m)	567.68	655.25	763.95	955.16	1,088.63	1,187.68
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)	624.01	624.01	624.01	624.01	624.01	624.01
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	96.26	215.75	425.93	572.64	681.53
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	32.37	78.15	139.90	179.53	207.08
K	Comparison goods commitments (£m)	0.00	9.89	10.59	11.52	12.11	12.53
L	Total claims on capacity	0.00	42.26	88.74	151.42	191.64	219.61
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	96.26	215.75	425.93	572.64	681.53
N	Total claims on capacity (£m)	0.00	42.26	88.74	151.42	191.64	219.61
O	Residual comparison goods expenditure (£m)	0.00	53.99	127.01	274.51	381.01	461.92
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,363	7,877	8,569	9,014	9,323
R	Comparison goods floorspace need (sq.m gross)	0	10,476	23,036	45,763	60,384	70,780

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 1.5% per annum applied.
Turnover per sq.m at 2014 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 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	4.28	4.58	4.98	5.24	5.42
Angel Way, Romford	5.61	6.00	6.53	6.87	7.11
Total	*9.89*	*10.59*	*11.52*	*12.11*	*12.53*

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Table CM7 —

Comparison goods floorspace requirements to 2031

Increasing retention requirement

		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total comparison goods expenditure (£m)	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	52%	52%	55%	55%	57%	57%
D	Retained comparison goods expenditure in LB Havering (£m)	624.01	720.26544	882.03995	1102.8	1302.6109	1421.1327
E	Comparison goods expenditure leakage (£m)	567.68	655.25	721.67	902.29	982.67	1,072.08
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)	624.01	624.01	624.01	624.01	624.01	624.01
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	96.26	258.03	478.79	678.60	797.13
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	32.37	78.15	139.90	179.53	207.08
K	Comparison goods commitments (£m)	0.00	9.89	10.59	11.52	12.11	12.53
L	Total claims on capacity	0.00	42.26	88.74	151.42	191.64	219.61
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	96.26	258.03	478.79	678.60	797.13
N	Total claims on capacity (£m)	0.00	42.26	88.74	151.42	191.64	219.61
O	Residual comparison goods expenditure (£m)	0.00	53.99	169.29	327.38	486.96	577.52
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,363	7,877	8,569	9,014	9,323
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**7,333**	**21,493**	**38,203**	**54,024**	**61,946**
R	Comparison goods floorspace need (sq.m gross)	0	10,476	30,704	54,576	77,177	88,494

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 1.5% per annum applied.
Turnover per sq.m at 2014 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 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	4.28	4.58	4.98	5.24	5.42
Angel Way, Romford	5.61	6.00	6.53	6.87	7.11
Total	*9.89*	*10.59*	*11.52*	*12.11*	*12.53*

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Table CV1 —
Population projections

Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	**429,288**	**442,231**	**462,169**	**488,678**	**520,315**	**536,975**	**547,846**	**105,615**

Notes
Source: Experian MMG3 (2012), for base year and population projections
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CV2 —
Per capita expenditure on convenience goods

	2012	2014	2017	2021	2026	2029	2031
Zone 1	1,933	1,898	1,906	1,952	2,011	2,048	2,072
Zone 2	2,178	2,139	2,147	2,199	2,266	2,307	2,335
Zone 3	1,750	1,718	1,725	1,767	1,820	1,853	1,876
Zone 4	2,034	1,997	2,005	2,054	2,116	2,154	2,180
Zone 5	2,236	2,196	2,205	2,258	2,327	2,369	2,397
Zone 6	1,766	1,734	1,741	1,783	1,837	1,870	1,893
Zone 7	2,053	2,016	2,024	2,073	2,136	2,174	2,200
Zone 8	1,670	1,640	1,646	1,686	1,737	1,769	1,790
Zone 9	1,569	1,541	1,547	1,585	1,633	1,663	1,683
Zone 10	1,860	1,827	1,834	1,878	1,935	1,970	1,994
Zone 11	2,173	2,134	2,143	2,195	2,261	2,302	2,330

Notes
The following expenditure growth rates are applied (source: Experian Retail Planne
Briefing Note 12, October 2014, Figures 1a and 1b)

2012-13:	-0.50%	
2013-14:	-1.30%	
2014-15:	-0.50%	
2015-16:	0.50%	
2016-17	0.40%	
2017-21:	0.60%	(per annum)
2021-31:	0.60%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices)
All monetary values held constant at 2012 prices

Table CV3 —
Total convenience goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	74.09	77.29	83.34	91.18	95.79	98.94
Zone 2	105.30	109.82	118.40	129.51	135.99	140.43
Zone 3	29.61	31.16	33.85	37.25	39.17	40.47
Zone 4	57.21	59.61	64.19	70.12	73.59	75.96
Zone 5	61.41	64.09	69.13	75.66	79.45	82.03
Zone 6	72.40	75.57	81.54	89.27	93.81	96.91
Zone 7	63.22	65.94	71.07	77.71	81.62	84.29
Zone 8	98.66	105.34	115.76	128.48	135.41	140.00
Zone 9	101.88	108.89	119.74	132.88	140.01	144.74
Zone 10	37.67	39.33	42.44	46.47	48.86	50.49
Zone 11	128.30	132.46	141.12	152.39	159.22	163.76
Total	**829.75**	**869.49**	**940.57**	**1,030.93**	**1,082.92**	**1,118.00**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2029	2031
SFT rate	2.60%	3.30%	4.40%	5.00%	5.30%	5.60%
	£m	£m	£m	£m	£m	£m
Zone 1	1.93	2.55	3.67	4.56	5.08	5.54
Zone 2	2.74	3.62	5.21	6.48	7.21	7.86
Zone 3	0.77	1.03	1.49	1.86	2.08	2.27
Zone 4	1.49	1.97	2.82	3.51	3.90	4.25
Zone 5	1.60	2.12	3.04	3.78	4.21	4.59
Zone 6	1.88	2.49	3.59	4.46	4.97	5.43
Zone 7	1.64	2.18	3.13	3.89	4.33	4.72
Zone 8	2.57	3.48	5.09	6.42	7.18	7.84
Zone 9	2.65	3.59	5.27	6.64	7.42	8.11
Zone 10	0.98	1.30	1.87	2.32	2.59	2.83
Zone 11	3.34	4.37	6.21	7.62	8.44	9.17
Total	**21.57**	**28.69**	**41.39**	**51.55**	**57.39**	**62.61**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	72.16	74.74	79.67	86.62	90.71	93.40
Zone 2	102.57	106.20	113.19	123.03	128.79	132.56
Zone 3	28.84	30.13	32.36	35.38	37.10	38.20
Zone 4	55.72	57.64	61.37	66.62	69.69	71.70
Zone 5	59.81	61.98	66.09	71.88	75.24	77.43
Zone 6	70.52	73.08	77.96	84.81	88.84	91.48
Zone 7	61.57	63.76	67.94	73.83	77.30	79.57
Zone 8	96.09	101.86	110.67	122.05	128.23	132.16
Zone 9	99.23	105.29	114.47	126.24	132.59	136.63
Zone 10	36.69	38.03	40.57	44.15	46.27	47.66
Zone 11	124.97	128.09	134.91	144.77	150.78	154.59
Total	**808.18**	**840.80**	**899.19**	**979.38**	**1,025.53**	**1,055.39**

Notes
Source: Table CV1, Table CV2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices

Table CV4 —
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 CV5 —

Convenience goods spending patterns, 2014

	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 convenience goods expenditure	72.16	102.57	28.84	55.72	59.81	70.52	61.57	96.09	99.23	36.69	124.97	808.18
Zone 1												
Romford town centre												
Asda, Dolphin Approach, Mercury Gardens	15.45	9.01	3.32	1.93	1.44	4.16	6.24	4.08	2.17	0.71	0.84	49.35
Sainsbury's, The Brewery, Romford	11.26	0.63	4.75	0.43	0.77	1.62	4.85	2.68	0.00	1.74	0.00	28.72
Marks & Spencer, South Street, Romford	4.77	0.15	0.79	0.08	0.00	0.75	1.49	3.58	0.30	0.12	0.00	12.03
Aldi, Market Place, Romford	2.24	0.61	0.65	0.08	0.25	2.49	1.26	1.69	0.00	0.25	0.31	9.85
Lidl, Atlanta Bvd, Romford	1.79	0.40	0.62	0.32	0.00	0.19	0.00	0.08	0.00	0.00	0.32	3.73
Other stores, Romford town centre	1.75	0.00	0.25	0.00	0.00	0.00	0.41	0.52	0.00	0.02	0.00	2.95
Sub-total, Romford town centre	**37.26**	**10.80**	**10.38**	**2.85**	**2.46**	**9.21**	**14.25**	**12.63**	**2.48**	**2.83**	**1.47**	**106.63**
Other locations												
Aldi, Marlborough Road, Romford	3.22	0.30	0.48	1.56	0.00	1.59	13.68	1.37	0.00	0.00	2.49	24.70
Gidea Park	0.52	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95
Other foodstores, Romford / zone 1	5.52	0.47	1.10	0.34	0.00	1.81	1.95	0.73	0.89	0.79	0.00	13.61
Sub-total, survey zone 1	**46.53**	**12.00**	**11.97**	**4.76**	**2.46**	**12.61**	**29.88**	**14.72**	**3.37**	**3.63**	**3.96**	**145.89**
Zone 2												
Tesco Extra, Horchurch Road, Hornchurch	3.40	29.97	7.62	2.83	3.91	0.07	0.04	1.61	4.58	1.59	0.54	56.16
Sainsbury's, High Street, Hornchurch	2.21	27.66	0.28	8.24	2.46	0.58	0.18	0.00	0.00	1.07	0.00	42.68
Iceland, North Street, Hornchurch	0.00	5.24	0.00	1.09	0.00	0.00	0.00	0.00	0.00	0.54	0.00	6.87
Other stores, Hornchurch	0.22	4.45	0.00	2.18	0.15	0.00	0.00	0.00	0.33	0.09	0.00	7.42
Elm Park	0.00	3.93	0.00	2.15	1.00	1.88	0.00	0.08	0.00	0.00	0.00	9.05
Other foodstores, zone 2	0.14	0.26	0.23	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.11
Sub-total, survey zone 2	**5.98**	**71.51**	**8.13**	**16.97**	**7.51**	**2.53**	**0.23**	**1.69**	**4.90**	**3.29**	**0.54**	**123.29**
Zone 3												
Rush Green	0.00	0.00	1.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31
Other foodstores, zone 3	0.00	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.00	1.17
Sub-total, survey zone 3	**0.00**	**0.00**	**2.05**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.43**	**0.00**	**0.00**	**2.48**
Zone 4												
Tesco, Airfield Way, Elm Park	0.00	1.50	1.23	11.63	0.36	0.00	0.00	0.00	0.12	0.00	0.00	14.84
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**	**1.50**	**1.23**	**11.63**	**0.36**	**0.00**	**0.00**	**0.00**	**0.12**	**0.00**	**0.00**	**14.84**
Zone 5												
Aldi, St Mary's Lane, Upminster	0.10	4.20	0.00	3.08	15.16	1.42	0.83	0.00	0.10	0.30	1.73	26.93
Waitrose, St Mary's Lane, Upminster	0.50	1.48	0.14	0.11	8.86	0.50	0.00	0.00	0.29	0.00	0.82	12.69
Marks & Spencer Simply Food, Station Road, Upminster	0.42	0.52	0.00	0.25	3.44	1.02	0.00	0.00	0.22	0.14	0.00	6.01
Other foodstores, Upminster	0.00	0.17	0.00	0.04	3.94	0.12	0.00	0.00	0.00	0.09	0.10	4.48
Other foodstores, zone 5	0.00	0.00	0.00	0.00	3.08	0.00	0.00	0.00	0.00	0.00	0.00	3.08
Sub-total, survey zone 5	**1.03**	**6.37**	**0.14**	**3.48**	**34.48**	**3.06**	**0.83**	**0.00**	**0.60**	**0.54**	**2.65**	**53.19**
Zone 6												
Tesco Extra, Bryant Avenue, Romford	12.41	6.74	1.84	0.28	5.08	31.65	10.47	0.00	0.00	0.55	9.11	78.12
Iceland, Farnham Road, Harold Hill	1.21	0.00	0.00	0.00	0.00	5.63	0.23	0.00	0.00	0.15	0.00	7.22
Sainsbury's Local, Farnham Road, Harold Hill	0.00	0.00	0.00	0.00	0.00	2.48	0.00	0.00	0.00	0.00	0.00	2.48
Co-Operative, Station Road, Harold Wood	0.00	0.00	0.00	0.00	0.00	2.32	0.00	0.00	0.00	0.00	0.00	2.32
Other foodstores, Harold Hill	0.00	1.16	0.00	0.00	0.00	4.05	0.27	0.00	0.00	0.07	0.00	5.54
Other foodstores, zone 6	0.05	0.00	0.00	0.00	0.00	0.97	0.00	0.00	0.00	0.00	0.00	1.02
Sub-total, survey zone 6	**13.67**	**7.90**	**1.84**	**0.28**	**5.08**	**47.10**	**10.96**	**0.00**	**0.00**	**0.77**	**9.11**	**96.72**
Zone 7												
Tesco Metro, Collier Row Lane, Collier Row	1.74	0.00	0.16	0.00	0.00	0.90	12.92	0.57	0.00	0.00	0.42	16.72
Other foodstores, zone 7	0.21	0.00	0.00	0.00	0.00	0.00	3.32	0.00	0.00	0.00	0.00	3.53
Sub-total, survey zone 7	**1.95**	**0.00**	**0.16**	**0.00**	**0.00**	**0.90**	**16.25**	**0.57**	**0.00**	**0.00**	**0.42**	**20.25**
Zone 8												
Sainsbury's, High Road, Chadwell Heath	0.84	0.00	1.00	0.28	0.00	0.00	0.97	21.73	1.13	0.08	0.00	26.03
Tesco Extra, High Road, Goodmayes	0.26	0.00	0.27	0.00	0.00	0.00	0.18	15.11	3.11	0.00	0.00	18.94
Tesco Express, High Road, Chadwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.54	0.00	0.00	0.00	5.54
Asda, Whalebone Lane, Chadwell Heath	0.00	0.00	0.41	0.00	0.00	0.00	0.00	2.50	0.87	0.00	0.00	3.79
Other foodstores, zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.98	1.89	0.00	0.00	2.86
Sub-total, survey zone 8	**1.10**	**0.00**	**1.69**	**0.28**	**0.00**	**0.00**	**1.15**	**45.87**	**6.99**	**0.08**	**0.00**	**57.16**
Zone 9												
Asda, Merrielands Crescent, Dagenham	0.00	0.06	0.14	2.92	0.05	0.00	0.75	6.43	34.31	3.09	1.46	49.21
Morrisons, Wood Lane, Becontree Heath	0.04	0.00	0.70	0.20	0.00	0.00	0.00	10.18	7.76	1.11	0.00	20.00
Iceland, Heathway, Dagenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	5.06	0.00	0.00	5.45
Tesco Express, Heathway, Dagenham	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.57	4.55	0.00	0.00	5.16
Lidl, Heathway, Dagenham	0.00	0.00	0.10	0.26	0.00	0.00	0.00	0.39	2.96	0.13	0.00	3.84
Other foodstores, zone 9	0.00	0.30	0.22	1.37	0.05	0.00	0.00	1.60	7.23	2.05	0.00	12.81
Sub-total, survey zone 9	**0.04**	**0.35**	**1.16**	**4.79**	**0.10**	**0.00**	**0.75**	**19.57**	**61.87**	**6.37**	**1.46**	**96.47**
Zone 10												
Tesco Extra, Bridge Road, Rainham	0.00	1.77	0.18	11.55	1.73	0.00	0.00	0.00	5.41	16.25	0.00	36.89
Tesco Express, Rainham Road, Rainham	0.00	0.00	0.00	1.28	0.49	0.20	0.00	0.00	0.88	3.08	0.00	5.93
Other foodstores, zone 10	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	1.74	0.00	0.00	1.90
Sub-total, survey zone 10	**0.00**	**1.77**	**0.18**	**12.99**	**2.21**	**0.20**	**0.00**	**0.00**	**8.03**	**19.33**	**0.00**	**44.71**
Zone 11												
Sainsbury's, William Hunter Way, Brentwood	0.76	0.00	0.00	0.00	1.48	1.12	0.18	0.00	0.00	0.00	60.64	64.17
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	4.68	4.68
Other foodstores, zone 11	0.29	0.17	0.00	0.00	0.00	0.69	0.00	0.50	0.00	0.00	24.36	26.02
Sub-total, survey zone 11	**1.06**	**0.17**	**0.00**	**0.00**	**1.48**	**1.81**	**0.18**	**0.50**	**0.00**	**0.00**	**89.68**	**94.87**
Total for study area	**71.35**	**101.58**	**28.55**	**55.17**	**53.68**	**68.22**	**60.22**	**82.92**	**86.33**	**34.02**	**107.83**	**749.85**
Stores outside study area												
Ilford foodstores	0.00	0.00	0.00	0.04	0.05	0.00	0.48	6.27	0.99	0.00	0.00	7.82
Lakeside / Grays / South Ockendon foodstores	0.00	0.15	0.00	0.47	4.43	0.00	0.00	0.39	0.30	2.26	0.50	8.49
Barking foodstores	0.11	0.00	0.00	0.00	0.17	0.00	0.06	0.00	0.93	0.00	0.00	1.27
Basildon foodstores	0.00	0.00	0.00	0.00	0.00	0.20	0.49	0.00	0.00	0.00	6.05	6.74
Billericay foodstores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.64	4.64
Other foodstores outside study area	0.70	0.84	0.29	0.04	1.49	2.10	0.32	6.52	10.69	0.42	5.95	29.36
Total for outside study area	**0.81**	**0.99**	**0.29**	**0.56**	**6.13**	**2.30**	**1.35**	**13.18**	**12.91**	**2.67**	**17.14**	**58.33**
Overall total	**72.16**	**102.57**	**28.84**	**55.72**	**59.81**	**70.52**	**61.57**	**96.09**	**99.23**	**36.69**	**124.97**	**808.18**

Notes
Source: Table CV3, Table CV4. All monetary values held constant at 2012 prices.
All monetary values held constant at 2012 prices.

Table CV6 —
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	49.35	4,745	56.0%	2,657	12,905	34.29	15.06
Sainsbury's, The Brewery, Romford	28.72	5,667	60.0%	3,400	13,704	46.60	-17.87
Marks & Spencer, South Street, Romford	12.03	1,473	95.0%	1,399	11,261	15.76	-3.72
Aldi, Market Place, Romford	9.85	995	80.0%	796	11,200	8.92	0.93
Lidl, Atlanta Bvd, Romford	3.73	929	80.0%	743	3,469	2.58	1.15
Aldi, Marlborough Road, Romford	24.70	1,329	80.0%	1,063	11,200	11.91	12.79
Sub-total							**8.33**
Horchurch foodstores							
Tesco Extra, Horchurch Road, Hornchurch	56.16	6,120	55.0%	3,366	11,520	38.77	17.39
Sainsbury's, High Street, Hornchurch	42.68	3,046	80.0%	2,437	13,704	33.39	9.29
Iceland, North Street, Hornchurch	6.87	502	97.0%	487	7,395	3.60	3.26
Tesco, Airfield Way, Elm Park	14.84	1,228	90.0%	1,105	11,520	12.73	2.11
Sub-total							**32.05**
Upmister foodstores							
Aldi, St Mary's Lane, Upminster	26.93	995	80.0%	796	11,200	8.92	18.01
Waitrose, St Mary's Lane, Upminster	12.69	1,379	90.0%	1,241	11,810	14.66	-1.97
Marks & Spencer Simply Food, Station Road, Upminster	6.01	718	95.0%	682	11,261	7.68	-1.67
Sub-total							**14.38**
Harold Hill / Collier Row foodstores							
Tesco Extra, Bryant Avenue, Romford	78.12	8,253	55.0%	4,539	11,520	52.29	25.84
Sainsbury's Local, Farnham Road, Harold Hill	2.48	274	97.0%	266	13,704	3.64	-1.16
Co-Operative, Station Road, Harold Wood	2.32	254	100.0%	254	4,676	1.19	1.13
Tesco Metro, Collier Row Lane, Collier Row	16.72	560	95.0%	532	11,520	6.13	10.59
Sub-total							**36.39**
Rainham foodstores							
Tesco Extra, Bridge Road, Rainham	36.89	5,224	55.0%	2,873	11,520	33.10	3.79
Tesco Express, Rainham Road, Rainham	5.93	250	95.0%	238	13,704	3.25	2.67
Sub-total							**6.46**
Aggregate overtrading of foodstores in Borough							**97.61**

Notes
Foodstores listed are 'main' food shopping destinations with a meaningful market share, as listed in Table CV4 and Table CV5
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 Verdict's 2010 UK Grocery Retailers document, updated by PBA through site visits where appropriate.
Average sales densities are goods based sales densities derived from Verdict's UK Grocery Retailers Report
A positive figure indicates that the store is overtrading compared to company averages
All monetary values held constant at 2012 prices

Table CV7 —

Convenience goods floorspace requirements to 2031

Basline requirement

		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total convenience goods expenditure (£m)	808.18	840.80	899.19	979.38	1,025.53	1,055.39
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)	501.35	521.59	557.81	607.56	636.19	654.71
E	Convenience goods expenditure leakage (£m)	306.83	319.21	341.38	371.82	389.34	400.68
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)	501.35	501.35	501.35	501.35	501.35	501.35
Initial surplus							
I	Growth in retained convenience goods expenditure (£m)	0.00	20.24	56.46	106.21	134.83	153.36
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	1.50	7.57	15.25	19.91	23.04
K	Convenience goods commitments (£m)	0.00	50.86	51.47	52.25	52.72	53.04
L	Total claims on capacity	0.00	52.37	59.04	67.50	72.63	76.08
Expenditure summary							
M	Initial surplus of convenience goods expenditure (£m)	0.00	20.24	56.46	106.21	134.83	153.36
N	Total claims on capacity (£m)	0.00	52.37	59.04	67.50	72.63	76.08
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	65.48	95.03	136.32	159.81	174.89
Conversion to floorspace need							
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074	13,272
R	**Convenience goods floorspace need (sq.m net)**	**7,809**	**5,223**	**7,489**	**10,584**	**12,223**	**13,177**
S	Convenience goods floorspace need (sq.m gross)	12,014	8,036	11,522	16,283	18,805	20,273

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 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 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 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	36.17	36.60	37.16	37.49	37.72
Angel Way, Romford	14.69	14.87	15.09	15.23	15.32
Total	*50.86*	*51.47*	*52.25*	*52.72*	*53.04*

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Appendix D Quantitative Need Methodology

Appendix: Quantitative Need Methodology

Summary of methodology

Our methodology for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
Step 2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
Step 3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at **Step 1**) with the expenditure figures (calculated at **Step 2**), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
Step 4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at **Step 3**)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
Step 7	Project the spending forecasts forward to the forecast years.
Step 8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
Step 9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix E Technical Inputs

Appendix: Technical inputs into capacity forecasts

<table>
<tr><th>Data</th><th>Source</th><th>How we have used the data</th></tr>
<tr><td>Base Population</td><td>Experian</td><td>Experian’s MMG3 software provides 2012-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.</td></tr>
<tr><td>Population Projections</td><td>Experian</td><td>Experian’s MMG software provides annual population projections over the period to 2031, and we use these forecasts where applicable.</td></tr>
<tr><td>Base Per Capita Expenditure</td><td>Experian</td><td>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.</td></tr>
<tr><td>Retail and leisure expenditure growth forecasts</td><td>Experian</td><td>We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 12 (Figures 1a and 1b), as follows:
<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th><th>Commercial leisure</th></tr>
<tr><td>2012-13</td><td>2.60%</td><td>-0.50%</td><td>-0.60%</td></tr>
<tr><td>2013-14</td><td>4.60%</td><td>-1.30%</td><td>0.00%</td></tr>
<tr><td>2014-15</td><td>5.60%</td><td>-0.50%</td><td>2.10%</td></tr>
<tr><td>2015-16</td><td>4.40%</td><td>0.50%</td><td>2.80%</td></tr>
<tr><td>2016-17</td><td>3.10%</td><td>0.40%</td><td>1.30%</td></tr>
<tr><td>2017-21*</td><td>3.10%</td><td>0.60%</td><td>1.10%</td></tr>
<tr><td>2021-31*</td><td>3.30%</td><td>0.60%</td><td>1.30%</td></tr>
</table>
*per annum growth rates</td></tr>
<tr><td>Base Year Special Forms of Trading (SFT)</td><td>Experian / Household survey</td><td>Special Forms of Trading refers to the amount of money <u>not</u> spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian’s Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the base year of the study:

Comparison goods (2014): 11.7%
Convenience goods (2014): 2.6%

For the purposes of our assessment we used the ‘adjusted’ figure presented by Experian, which makes allowance for store-picked online shopping transactions.</td></tr>
<tr><td>Growth in SFT</td><td>Experian</td><td>Experian’s Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the study forecast years:
<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th></tr>
<tr><td>2017</td><td>14.0%</td><td>3.3%</td></tr>
<tr><td>2021</td><td>15.9%</td><td>4.4%</td></tr>
<tr><td>2026</td><td>15.9%</td><td>5.0%</td></tr>
<tr><td>2031</td><td>15.5%</td><td>5.6%</td></tr>
</table>
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.</td></tr>
<tr><td>Retailer productivity changes</td><td>Experian/PBBI</td><td>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:

Comparison goods: 1.7% per annum, 2014-31
Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-31.</td></tr>
</table>

Appendix F Leisure Tables

Table L1 —
Population projections

	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	**429,288**	**442,231**	**462,169**	**488,678**	**520,315**	**536,975**	**547,846**	**105,615**

Notes
Source: Experian MMG3 (2012), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections.

Table LC2 —

Per capita expenditure on leisure services

	2012	2014	2017	2021	2026	2029	2031
	£	£	£	£	£	£	£
Accommodation services							
Zone 1	143	143	152	158	169	175	180
Zone 2	156	155	165	173	184	191	196
Zone 3	99	98	105	109	116	121	124
Zone 4	118	117	124	130	138	144	148
Zone 5	163	162	172	180	192	199	204
Zone 6	83	83	88	92	98	102	104
Zone 7	122	121	129	134	143	149	153
Zone 8	92	91	97	101	108	112	115
Zone 9	62	62	66	69	73	76	78
Zone 10	98	97	103	108	115	119	122
Zone 11	150	149	158	165	176	183	188
Cultural services							
Zone 1	272	271	288	301	320	333	342
Zone 2	301	299	318	333	354	368	378
Zone 3	253	251	267	279	297	309	317
Zone 4	275	273	291	304	323	336	345
Zone 5	308	306	326	340	362	376	386
Zone 6	240	238	253	264	282	293	300
Zone 7	287	285	303	316	337	350	359
Zone 8	213	212	225	235	250	260	267
Zone 9	200	198	211	220	235	244	250
Zone 10	258	256	272	284	303	315	323
Zone 11	320	318	338	353	376	391	401
Games of chance							
Zone 1	106	106	112	118	125	130	133
Zone 2	123	122	129	135	144	150	154
Zone 3	121	120	128	134	142	148	152
Zone 4	137	137	145	152	161	168	172
Zone 5	119	118	125	131	139	145	149
Zone 6	135	134	143	149	159	165	170
Zone 7	140	139	148	155	165	171	176
Zone 8	103	102	108	113	121	125	129
Zone 9	124	123	131	137	146	151	155
Zone 10	134	133	142	148	158	164	168
Zone 11	133	132	141	147	157	163	167
Hairdressing salons & personal grooming							
Zone 1	87	86	92	96	102	106	109
Zone 2	107	107	113	118	126	131	134
Zone 3	69	69	73	76	81	84	87
Zone 4	87	86	92	96	102	106	109
Zone 5	116	115	122	128	136	141	145
Zone 6	65	65	69	72	77	80	82
Zone 7	93	92	98	102	109	113	116
Zone 8	48	48	51	53	56	58	60
Zone 9	43	43	45	47	50	52	54
Zone 10	76	75	80	83	89	92	95
Zone 11	115	115	122	127	136	141	145
Recreational & sporting goods							
Zone 1	152	151	161	168	179	186	191
Zone 2	178	176	188	196	209	217	223
Zone 3	113	112	119	124	132	137	141
Zone 4	133	133	141	147	157	163	167
Zone 5	188	187	199	208	221	230	236
Zone 6	96	95	101	106	113	117	120
Zone 7	139	138	146	153	163	169	174
Zone 8	90	90	95	100	106	110	113
Zone 9	66	65	69	72	77	80	82
Zone 10	116	115	123	128	136	142	145
Zone 11	152	151	161	168	179	186	191
Restaurants & cafes							
Zone 1	1,084	1077	1146	1197	1274	1325	1,359
Zone 2	1,182	1175	1249	1305	1389	1444	1,482
Zone 3	907	902	959	1001	1066	1108	1,137
Zone 4	1,027	1021	1085	1134	1207	1254	1,287
Zone 5	1,208	1200	1276	1333	1420	1476	1,514
Zone 6	818	813	865	903	962	1000	1,026
Zone 7	1,015	1009	1072	1120	1193	1240	1,272
Zone 8	769	765	813	849	904	940	964
Zone 9	669	665	707	738	786	817	839
Zone 10	926	920	978	1022	1088	1131	1,160
Zone 11	1,188	1181	1256	1312	1397	1452	1,490

Notes
Source: Experian MMG for 2012 base data

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13	-0.60%	
2013-14	0.00%	
2014-15	2.10%	
2015-16	2.80%	
2016-17	1.30%	
2017-21	1.10%	
2021-31	1.30%	per annum

All monetary values are held constant at 2012 prices.

Table LC3 —

Total expenditure on leisure services

	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m	£m	£m
Accommodation services								
Zone 1	5.46	5.56	6.15	6.76	7.64	8.20	8.59	3.02
Zone 2	7.51	7.65	8.45	9.29	10.50	11.25	11.78	4.14
Zone 3	1.65	1.70	1.89	2.09	2.38	2.56	2.68	0.98
Zone 4	3.29	3.35	3.70	4.06	4.58	4.91	5.14	1.79
Zone 5	4.45	4.53	5.01	5.51	6.23	6.68	6.99	2.46
Zone 6	3.39	3.46	3.82	4.20	4.76	5.10	5.34	1.89
Zone 7	3.73	3.80	4.19	4.61	5.21	5.58	5.85	2.05
Zone 8	5.27	5.48	6.19	6.94	7.96	8.57	8.98	3.50
Zone 9	3.94	4.10	4.64	5.21	5.97	6.42	6.73	2.63
Zone 10	1.96	2.00	2.21	2.43	2.75	2.95	3.10	1.10
Zone 11	8.86	8.95	9.79	10.64	11.87	12.66	13.21	4.25
Total	**49.50**	**50.57**	**56.03**	**61.75**	**69.85**	**74.89**	**78.39**	**27.82**
Cultural services								
Zone 1	10.38	10.57	11.68	12.84	14.52	15.57	16.31	5.74
Zone 2	14.47	14.74	16.28	17.91	20.24	21.70	22.72	7.97
Zone 3	4.22	4.33	4.83	5.35	6.08	6.53	6.84	2.51
Zone 4	7.69	7.83	8.64	9.49	10.71	11.48	12.01	4.18
Zone 5	8.40	8.56	9.46	10.41	11.77	12.62	13.21	4.65
Zone 6	9.76	9.94	10.99	12.09	13.68	14.68	15.38	5.43
Zone 7	8.77	8.93	9.87	10.85	12.25	13.14	13.76	4.83
Zone 8	12.25	12.74	14.40	16.14	18.51	19.92	20.89	8.15
Zone 9	12.60	13.12	14.84	16.65	19.09	20.54	21.53	8.41
Zone 10	5.18	5.28	5.84	6.42	7.27	7.80	8.17	2.90
Zone 11	18.91	19.12	20.91	22.72	25.35	27.04	28.20	9.08
Total	**112.64**	**115.16**	**127.74**	**140.88**	**159.48**	**171.03**	**179.02**	**63.86**
Games of chance								
Zone 1	4.05	4.13	4.56	5.02	5.67	6.08	6.37	2.24
Zone 2	5.88	5.99	6.62	7.28	8.23	8.82	9.24	3.24
Zone 3	2.02	2.07	2.31	2.56	2.91	3.13	3.27	1.20
Zone 4	3.84	3.91	4.31	4.74	5.35	5.73	6.00	2.09
Zone 5	3.24	3.30	3.65	4.01	4.54	4.86	5.09	1.79
Zone 6	5.51	5.61	6.21	6.83	7.73	8.29	8.68	3.07
Zone 7	4.29	4.37	4.83	5.31	6.00	6.43	6.74	2.36
Zone 8	5.90	6.14	6.94	7.78	8.92	9.60	10.06	3.92
Zone 9	7.82	8.13	9.21	10.33	11.84	12.74	13.35	5.22
Zone 10	2.69	2.75	3.04	3.34	3.78	4.06	4.25	1.51
Zone 11	7.88	7.96	8.71	9.46	10.56	11.26	11.75	3.78
Total	**53.13**	**54.37**	**60.38**	**66.66**	**75.52**	**81.01**	**84.81**	**30.43**
Hairdressing salons & personal grooming								
Zone 1	3.31	3.37	3.72	4.09	4.63	4.96	5.20	1.59
Zone 2	5.15	5.25	5.80	6.37	7.20	7.72	8.09	2.48
Zone 3	1.15	1.18	1.32	1.46	1.66	1.78	1.87	0.60
Zone 4	2.43	2.48	2.73	3.00	3.39	3.63	3.80	1.15
Zone 5	3.16	3.22	3.55	3.91	4.42	4.74	4.96	1.53
Zone 6	2.66	2.71	2.99	3.30	3.73	4.00	4.19	1.29
Zone 7	2.83	2.88	3.19	3.50	3.96	4.24	4.44	1.36
Zone 8	2.75	2.86	3.23	3.62	4.15	4.47	4.69	1.61
Zone 9	2.70	2.81	3.18	3.57	4.09	4.40	4.62	1.59
Zone 10	1.52	1.55	1.71	1.88	2.13	2.29	2.40	0.74
Zone 11	6.81	6.89	7.53	8.19	9.13	9.74	10.16	2.85
Total	**34.47**	**35.19**	**38.96**	**42.90**	**48.50**	**51.99**	**54.41**	**19.22**
Recreational & sporting goods								
Zone 1	5.80	5.91	6.53	7.18	8.12	8.70	9.12	3.21
Zone 2	8.53	8.69	9.59	10.55	11.92	12.78	13.38	4.70
Zone 3	1.88	1.93	2.15	2.38	2.71	2.91	3.04	1.12
Zone 4	3.73	3.80	4.19	4.60	5.19	5.57	5.82	2.03
Zone 5	5.13	5.23	5.78	6.35	7.19	7.70	8.07	2.84
Zone 6	3.90	3.97	4.39	4.84	5.47	5.87	6.15	2.17
Zone 7	4.24	4.32	4.77	5.24	5.92	6.35	6.65	2.33
Zone 8	5.19	5.39	6.10	6.84	7.84	8.44	8.84	3.45
Zone 9	4.14	4.31	4.88	5.47	6.27	6.75	7.08	2.77
Zone 10	2.33	2.38	2.63	2.89	3.27	3.51	3.68	1.30
Zone 11	8.98	9.08	9.93	10.79	12.04	12.84	13.40	4.31
Total	**53.85**	**55.00**	**60.93**	**67.14**	**75.95**	**81.43**	**85.23**	**30.23**
Restaurants & cafes								
Zone 1	41.28	42.06	46.46	51.10	57.77	61.96	64.89	22.84
Zone 2	56.78	57.84	63.89	70.26	79.40	85.13	89.13	31.29
Zone 3	15.14	15.54	17.31	19.19	21.81	23.43	24.54	9.00
Zone 4	28.71	29.23	32.25	35.43	39.99	42.85	44.85	15.61
Zone 5	32.95	33.57	37.11	40.82	46.17	49.49	51.81	18.25
Zone 6	33.32	33.95	37.53	41.31	46.73	50.13	52.51	18.56
Zone 7	31.07	31.63	34.94	38.42	43.40	46.55	48.74	17.10
Zone 8	44.25	46.00	52.01	58.30	66.86	71.95	75.42	29.43
Zone 9	42.23	43.95	49.74	55.79	63.97	68.82	72.14	28.19
Zone 10	18.61	18.97	20.98	23.09	26.12	28.04	29.38	10.41
Zone 11	70.22	71.01	77.63	84.37	94.13	100.42	104.72	33.71
Total	**414.57**	**423.75**	**469.86**	**518.07**	**586.36**	**628.77**	**658.14**	**234.39**

Notes
Source: Table LC1, Table LC2
All monetary values are held constant at 2012 prices.

Table LC4 —
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 LC5 —

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 LC6 —

Summary of A3, A4 & A5 floorspace requirements

		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population	442,231	462,169	488,678	520,315	536,975	547,846
B	Total study area expenditure on food & drink	423.75	469.86	518.07	586.36	628.77	658.14
Retained expenditure							
C	Retained food & drink expenditure(1)	54%	54%	54%	54%	54%	54%
D	Retained food & drink expenditure	230.60	255.69	281.93	319.09	342.17	358.15
E	Expenditure leakage	193.15	214.17	236.14	267.27	286.60	299.99
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	230.60	230.60	230.60	230.60	230.60	230.60
Initial surplus							
I	Growth in retained expenditure	0.00	25.09	51.33	88.49	111.57	127.55
Claims on expenditure							
J	Sales efficiency growth in existing operators(3)	0.00	3.48	8.19	14.22	17.91	20.40
K	Commitments for new floorspace	0	0	0	0	0	0
L	Total claims on capacity	**0.00**	**3.48**	**8.19**	**14.22**	**17.91**	**20.40**
Expenditure summary							
M	Initial surplus of expenditure	0.00	25.09	51.33	88.49	111.57	127.55
N	Total claims on capacity	0.00	3.48	8.19	14.22	17.91	20.40
O	Residual expenditure	**0.00**	**21.62**	**43.14**	**74.27**	**93.66**	**107.15**
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**	**3,276**	**6,409**	**10,762**	**13,370**	**15,145**

Notes
All monetary values are held constant at 2012 prices.
Sales efficiency growth rate of 0.5% per annum applied.

Table LC7 —

Cinema & theatre market shares, 2014

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