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Havering Retail & Town Centres Study

VOLUME B: RETAIL CAPACITY ASSESSMENT

Prepared on behalf of

London Borough of Havering

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1.0 INTRODUCTION

- 1.1. This appendix sets out the methodology and results of the economic retail capacity ('need') assessment for new retail (convenience and comparison goods) floorspace in Havering and its main retail centres. Aligned with the NPPF and PPG the capacity forecasts take account of the expected lifetime of the plan starting from 2023 (base year) up to 2038. The detailed economic capacity tabulations are attached. These forecasts update and supersede the findings of the Council's previous evidence-based study – the Havering Retail & Commercial Leisure Needs Assessment prepared by Peter Brett Associates (PBA) in 2015.
- 1.2. The report also includes an assessment of leisure expenditure.

THE CREAT^e MODEL

- 1.3. The **CREAT^e** economic model has been specifically designed, developed and tested by the LSH team over more than 25 years to assess the capacity for and impact of new retail (convenience and comparison goods) floorspace development. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional and regional level. In brief, the CREAT^e (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested. The model is underpinned by the findings of the household survey, which provides a robust understanding of shopping patterns, market shares and the trading/turnover performance of existing centres, shops and stores.
- 1.4. At the outset it has been assumed for the purpose of the capacity assessment that the local retail market in Havering is in 'equilibrium' at the base year. In other words all existing centres/stores are broadly assumed to be trading in line with expected average ('benchmark') turnover levels. This is a reasonable approach in this case, as it reflects the impact of the economic downturn and the significant growth in online sales on the trading levels and performance of retailers and stores across the UK. It also reflects the outputs of the health checks and surveys covering the Borough's town and district centres.
- 1.5. In simple terms, any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers based on applying robust year-on-year 'productivity' ('turnover efficiency') growth rates to all existing and new retail floorspace.
- 1.6. In this case, there is no evidence to suggest a strong latent demand, or capacity for new retail floorspace across the Borough in the short-term. In fact, the main challenge and focus for the Borough's centres over the short/medium term will revolve around their response to a multitude of economic factors. They include: their response to evolving market trends, recovery from the COVID-19 pandemic, impacts from the energy and cost-of-living crisis, and rises in both interest rates and inflation. These factors will influence the ability for the Borough's centres to retain existing occupiers and to redevelop/repurpose vacant retail floorspace to attract new businesses and uses.
- 1.7. In the medium to longer term however, limited capacity for additional retail provision is expected to arise, given the anticipated increase in available expenditure and population growth in the Borough. However, this is very limited in terms of floorspace and does not make any allowance for the reuse of currently vacant floorspace or committed developments.
- 1.8. Further, it is important to state that medium to long term forecasts should be treated with caution, as they will be influenced by the dynamic changes in economic, demographic and market trends. As described in the main report (see Section 2), the NPPF (paragraph 86) states that local planning

authorities should meet the need for retail and town centre uses “looking at least ten years ahead”. The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments “*may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*”. Therefore, whilst this study assesses retail capacity up to 2038, we advise that greater weight should be placed by the local planning authority on forecasts over the next five (to 2028) to ten-year period (to 2033).

- 1.9. The updated capacity forecasts set out in this section will also help inform whether there is a need to identify and allocate sites to meet any forecast need; in accordance with the advice set out in the NPPF (paragraph 86).
- 1.10. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT^e Model are described below.

BASE YEAR POPULATION AND PROJECTIONS

- 1.11. The 2023 ('base year') study zone population estimates and projections over the study period (to 2038) have been informed by the *Office of National Statistics* (ONS) 2018-based '*Sub-National Population Projections*' (SNPP) and are set out in Appendix B2, with a map of the Study Area provided in Appendix B1. The key headlines include:
 - The population within the study area is expected to increase by 17,340 between 2023 and 2033 (+3.7%) and by nearly 26,000 by 2038 (+5.5%); and
 - The greatest increases in population are expected in Zones 6 (Harold Hill), Zone 2 (Hornchurch) and Zone 1 (Romford).

EXPENDITURE PER CAPITA LEVELS AND FORECASTS

- 1.12. The baseline expenditure per capita ('per person') figures and forecasts are set out in Table B2.2 for convenience goods and Table B2.4 (Appendix B2) for comparison goods¹. The growth in the expenditure per capita figures by zone are informed by the annual forecasts published in the latest *Experian Retail Planner Briefing Note 20* (RPBN)². As described in Section 3 of the main report, Experian forecast more limited year-on-year growth in retail expenditure than previous forecasts due to the impact of long-term economic and market trends, which have been further accelerated by the impact of the pandemic.

SPECIAL FORMS OF TRADING

- 1.13. Special Forms of Trading (SFT) is expenditure spent at locations other than traditional shops, including temporary markets and online shopping. This is therefore deducted from the forecast retail (convenience and comparison) expenditure levels over the forecast period. For the purpose of this assessment, we have used the rates suggested by Experian in their most recent RPBN.
- 1.14. The SFT market shares have been adjusted to reflect the fact that a proportion of online convenience and comparison retail sales are sourced from traditional ('physical') stores rather than from dedicated

¹ The baseline (2023) average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS (please note all expenditure and turnover figures are expressed in 2020 prices).

² Published in February 2023

('dot com') warehouses³. The baseline SFT market shares are 5.6% for convenience goods and 26.5% for comparison goods in 2023. These are forecast to increase to 7.7% and 32.0% respectively by 2038.

TOTAL AVAILABLE EXPENDITURE

1.15. Tables B2.3 and B2.5 (Appendix B2) forecast the growth in total available convenience goods and comparison goods retail expenditure across the Study Area and zones up to 2038 (excluding SFT). The tables for the ten-year period from 2023 to 2033 show that the increase in **Convenience goods expenditure** is expected to be limited, with an overall increase of just 2.3% (£24.1m) across the whole of the study area.

1.16. The increase in comparison spend will be considerably greater at £284.2m (24.9%). However this has to be seen in the context of the significant decline seen in 2020 (-18.1% excluding SFT) as a result of the Covid pandemic. With growth of 6.0% in 2021 and 2% in 2022, comparison spend is still expected to be lower than in 2019 for much of the first part of the plan period.

1.17. MARKET SHARE ANALYSIS

1.18. The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres, stores and floorspace based on the survey-derived market shares. This helps to establish the current trading performance of the main centres and stores within the Borough based on expenditure allocated from the Study Area only. It should be noted that no allowance is made at this stage for any potential 'inflow' (trade draw) of expenditure to centres and stores from outside the defined Study Area.

1.19. The market share tables are provided in Appendix B3 (Convenience) and Appendix B4 (Comparison).

1.20. Tables B3.1 and B4.1 show the overall market shares for convenience and comparison spend respectively.

1.21. Table B3.1 has been derived from the responses to the questions in the household survey relating to main food and top-up shopping habits (see Tables B3.2 – B3.5). The responses to these questions have been weighted to assume the following split of total convenience expenditure:

- 50% spent at the 'Main Food shop' destination;
- 25% spent at the 'Other Main Food shop' destination;
- 15% spent at the 'Main Top-up shop' destination and
- 10% spent at the 'Other Top-up shop' destination;

1.22. The overall market shares for convenience have then been adjusted to exclude SFT (Table B3.6) and the resulting spend by store and centre is then provided for 2023, 2028, 2033 and 2038 in Tables B3.7-10.

1.23. For the comparison market shares, Table B4.1 has been derived from the responses to the questions in the household survey relating to non-food shopping habits (see Tables B4.2 – B4.12). The

³ Experian assume 25% of SFT's market share for comparison goods and 70% for convenience goods are sales sourced from "physical" stores.

responses to these questions have been weighted to reflect the proportion of expenditure going to each category of goods, as reflected in the comparison expenditure data provided by Experian and SFT has been excluded.

- 1.24. The resulting comparison spend for 2023, 2028, 2033 and 2038 is then provided in Tables B4.13 – B4.16.

'INFLOW' FROM OUTSIDE THE STUDY AREA

- 1.25. In order to provide a complete picture of the current and likely future trading (turnover) performance of the main centres and stores in the Borough we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined Study Area. In this case our assumptions take account of:
- the scale, quality and mix of each centre's retail (convenience and comparison) offer based on the results of the health checks;
 - the scale, offer and location of all other centres and stores in the Borough, including out-of-centre shopping locations;
 - the likely competition from centres, stores and shopping facilities outside the Study Area, informed by the results of the survey-derived market share analysis; and
 - the likely retail expenditure derived from people visiting the Borough's shops and stores and those working or studying in the Borough, but who live outside the Study Area (including commuters, students, visitors and those on business).
- 1.26. Although the assessment of inflow is not an "*exact science*" due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume additional expenditure is generated by shoppers and visitors to retail destinations in the Borough. Inflows to Romford are expected to be the greatest given the centre's metropolitan centre status and the range of offer. However, even smaller centres can expect a small amount of inflow, especially where they may be located close to the edge of the study area.
- 1.27. For the purposes of this assessment we have therefore assumed an inflow of 20% for Romford (convenience and comparison) and 5% for the district centres. The effect on centre turnover is summarized in Tables B5.2 (convenience) and Table B5.15 (comparison).
- 1.28. The previous study made no allowance for inflows which we consider to be unrealistic. Just as the survey confirms that there are residents from the Havering area shopping outside the study area, there will be people travelling inwards, whether for work or personal reasons. Table B4.13 shows that Romford gets approximately 25% of its trade from the zones outside of Havering borough and, whilst it would be less from further afield, Romford's status and public transport links lead us to conclude that a 20% inflow is not unrealistic.
- 1.29. With respect to the district centres, we consider it appropriate to make some allowance for inflows, although these will be at a much lower level than for Romford.

RETAIL FLOORSPEACE COMMITMENTS

- 1.30. The next stage in the retail capacity assessment takes account of committed and planned retail (convenience and comparison) developments in the Borough. In theory this should include all

permitted convenience and comparison floorspace (and recently opened outlets where relevant) that have been or will be developed/opened after the household survey was undertaken.

1.31. However, it has been the case for some time that many developers have sought to keep commercial uses within a scheme flexible, seeking permission for a mix of uses (previously A1, A2, A3, A4, A5). The introduction of a revised Use Classes Order in 2020 and specifically Class E supports this flexibility, but means it is often more difficult now to predict what commercial space may be provided as Class E(a) (retail) or an alternative Class E use. There is also the uncertainty whether retail floorspace will be used for convenience or comparison purposes.

1.32. For this capacity assessment we have therefore reviewed the sites currently allocated for development where a retail element was expected and have identified the following as relevant, in that the scheme has been completed or there is a planning permission that is expected to be implemented:

- **Romford Ice Rink (Policy SSA 7)** - This site has been the subject of a hybrid planning application (Ref: P0615.21) for a phased mixed-use development. This includes residential development, a retail/restaurant unit (Class E) and medical or neighbourhood centre (Class E(e)) as part of the full application and residential, a medical/hospital facility (Class C2/E(e)), flexible retail and cafe space (Class E), gym facilities for residents and NHS Staff (Class E) and a medical/neighbourhood centre (Class Ee/F2) as part of the outline application.

This application was approved on 5 September 2023 and includes a condition which restricts the Class E uses to retail/restaurant and medical/neighbourhood centre only. A second condition restricts the Class E floorspace to 995 sqm in total, with 600 sqm flexible retail and 394 sqm for restaurant uses and neighbourhood centre. The gym use is also restricted to a maximum 329 sqm GIA.

For the purposes of this capacity assessment we have assumed that the maximum 600sqm of retail floorspace will be provided and this will be evenly split between convenience and comparison uses. For convenience retail, the assumed net floorspace is 210 sqm and for comparison 240 sqm; and

- **Beam Park (Policy SSA 11)** which is one of the London Riverside sites within a London Plan Opportunity Area. Residential and mixed commercial and community uses are proposed, including a new local centre.

A 266 sqm net Sainsbury's Local store opened at Halewood Way in November 2023, within the LB Havering area. This has been included within the convenience capacity assessment.

1.33. There are two further sites which have been considered for inclusion in the capacity assessment, but have been excluded for the reasons set out below:

- **Rainham West (Policy SSA 12)** – there are currently two planning applications in this area, an application at the former RTS Motors Site, 84-86 New Road, Rainham which includes 345 sqm of flexible retail floorspace (Application Ref: P1022.20). and one at 90 New Road, Rainham (Application Ref: P1039.19) which includes 1,000 sqm of flexible retail floorspace. Both are currently awaiting determination and therefore have not been included in the capacity assessment; and

- **Angel Way (Site ROMSSA1)** – Planning permission was granted on appeal in 2009 for a mixed use development of 350 residential units, a 63-bedroom hotel, ground floor mixed retail, basement car parking and a new public square (Application Ref: P2246.07). There have been subsequent applications to vary the permission and discharge conditions during the intervening period and the site is now being developed by Regency Homes. However, the quantum of retail floorspace to be included within the development is not known and therefore the proposal has not been included in the capacity assessment.

FLOORSPACE PRODUCTIVITY

- 1.34. A key input to the retail capacity assessment is the application of a year-on-year floorspace ‘*productivity*’ growth rate to all existing and new retail floorspace. As described in the main report, existing retailers will need to achieve higher annual ‘*productivity*’ growth rates to cover their increasing costs (including, for example, rising rents, business rates and wages) and to remain profitable and viable over the short, medium and long term. This is particularly the case as the competition from online retailing increases; a trend that has been significantly accelerated by the impact of the pandemic.
- 1.35. Experian provides forecasts for productivity growth rates in the form of expected changes to retail sales densities (Figures 3 and 4), with two scenarios tested, assuming (i) constant floorspace and (ii) changing floorspace. For the purposes of this assessment we have used the ‘constant’ floorspace assumptions.

RETAIL CAPACITY ASSESSMENT

- 1.36. Our assessment of both convenience and comparison retail capacity is provided in Appendix B5, with convenience in Tables B5.1 – B5.13 and comparison in Tables starting from B5.14.
- 1.37. The assessment is based on the assumption that retail market shares for the Borough (retained Study Area expenditure) and at centre level remain constant. In other words, capacity forecasts do not allow for potential changes to shopping patterns from those identified in the household survey.
- 1.38. Capacity forecasts are provided for the study area overall, Romford Metropolitan Centre and the individual district centres, with the results summarized below. The ‘Elsewhere in Havering’ refers to all other locations outside these town centres and therefore includes both outlets in the smaller defined local centres, freestanding stores and those located on out of centre retail parks.

Table 1 Forecast Capacity for Convenience Floorspace in Havering (sqm net)

	2028	2033	2038
Romford Metropolitan Centre	-136	-84	-17
Collier Row District Centre	19	25	32
Elm Park District Centre	2	5	7
Harold Hill District Centre	0	0	1
Hornchurch District Centre	57	118	182
Rainham District Centre	13	30	51
Upminster District Centre	15	35	54
Elsewhere in LB Havering	-135	48	270
Total Convenience Goods Floorspace Capacity	-164	177	580

Note: Assumes Equilibrium at Base Year (2023) and Constant Market Shares

Source: Table B5.13

Table 2 Forecast Capacity for Comparison Floorspace in Havering (sqm net)

	2028	2033	2038
Romford Metropolitan Centre	-264	279	762
Collier Row District Centre	9	27	41
Elm Park District Centre	0	14	24
Harold Hill District Centre	9	26	41
Hornchurch District Centre	16	116	197
Rainham District Centre	-5	33	66
Upminster District Centre	-10	59	108
Elsewhere in LB Havering	71	619	1,084
Total COMPARISON Goods Floorspace Capacity	-172	1,173	2,323

Note: Assumes Equilibrium at Base Year (2023) and Constant Market Shares

Source: Table B5.13

- 1.39. In terms of **convenience provision**, the projections suggest that 177 sqm net of additional convenience floorspace would be required by 2033, with more than half of this required in Hornchurch if market shares remain as now. However, the quantum of floorspace require at 116 sqm is only about half that required for a convenience store such as a Tesco Express or Sainsbury's Local.
- 1.40. This need could be met in a number of different ways and locations, either through the development of convenience floorspace in a mixed use scheme, on one of the other sites allocated for development or elsewhere, the reoccupation of currently vacant floorspace, small-scale extensions to existing stores, or the conversion of other Class E floorspace.
- 1.41. In terms of **comparison provision** the amount of additional floorspace required by 2033 (1,173 sqm net) is small compared to the amount of vacant space identified within the borough and the identified need could easily be accommodated within existing space.
- 1.42. On this basis we conclude there is **no** requirement for the Council to allocate any new sites for retail provision in the period to 2033. For the reasons set out above we advise that this timeline is more realistic, given that forecasts beyond a ten-year period are not necessarily reliable.

SUMMARY

- 1.43. The NPPF (paragraph 86d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by "*looking at least **ten years ahead***". The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "*...may need to focus on a limited period (such as the next **five years**) but will also need to take the lifetime of the plan into account and be regularly reviewed*"⁴. Notwithstanding this, to help inform the Council's longer term plan-making and strategies we have assessed the potential capacity for new retail floorspace over the lifetime of the plan, up to 2038.
- 1.44. The assessment shows there is **limited need at Borough level for new retail floorspace over the next ten years**. Where capacity is identified at centre level, this is also limited in scale and can, in our view, be accommodated by the reoccupation of existing vacant units or potentially the change of other Class E floorspace to retail use.
- 1.45. However, where market demand presents an opportunity to improve retail offer in the Borough's centres then this should not be discounted on the basis that there is no or limited identified

⁴ PPG. Paragraph 004. Reference ID: 2b-004020190722

quantitative need. Where demand for new retail floorspace should arise over the plan period, then this should be directed to the Borough's existing centres in accordance with the "*town centre first*" (sequential) approach detailed in national and local plan policy and guidance.

LEISURE EXPENDITURE

- 1.46. Appendix B6 provides information on leisure expenditure in the study area, in terms of available spend per head and expenditure on different types of activities. Commentary on the tables is provided in Volume A.

VOLUME B: RETAIL CAPACITY APPENDICES

Appendices:

B1: DEFINED STUDY AREA & ZONES

B2: POPULATION PROJECTIONS & EXPENDITURE GROWTH

B3: MARKET SHARE ANALYSIS: CONVENIENCE GOODS

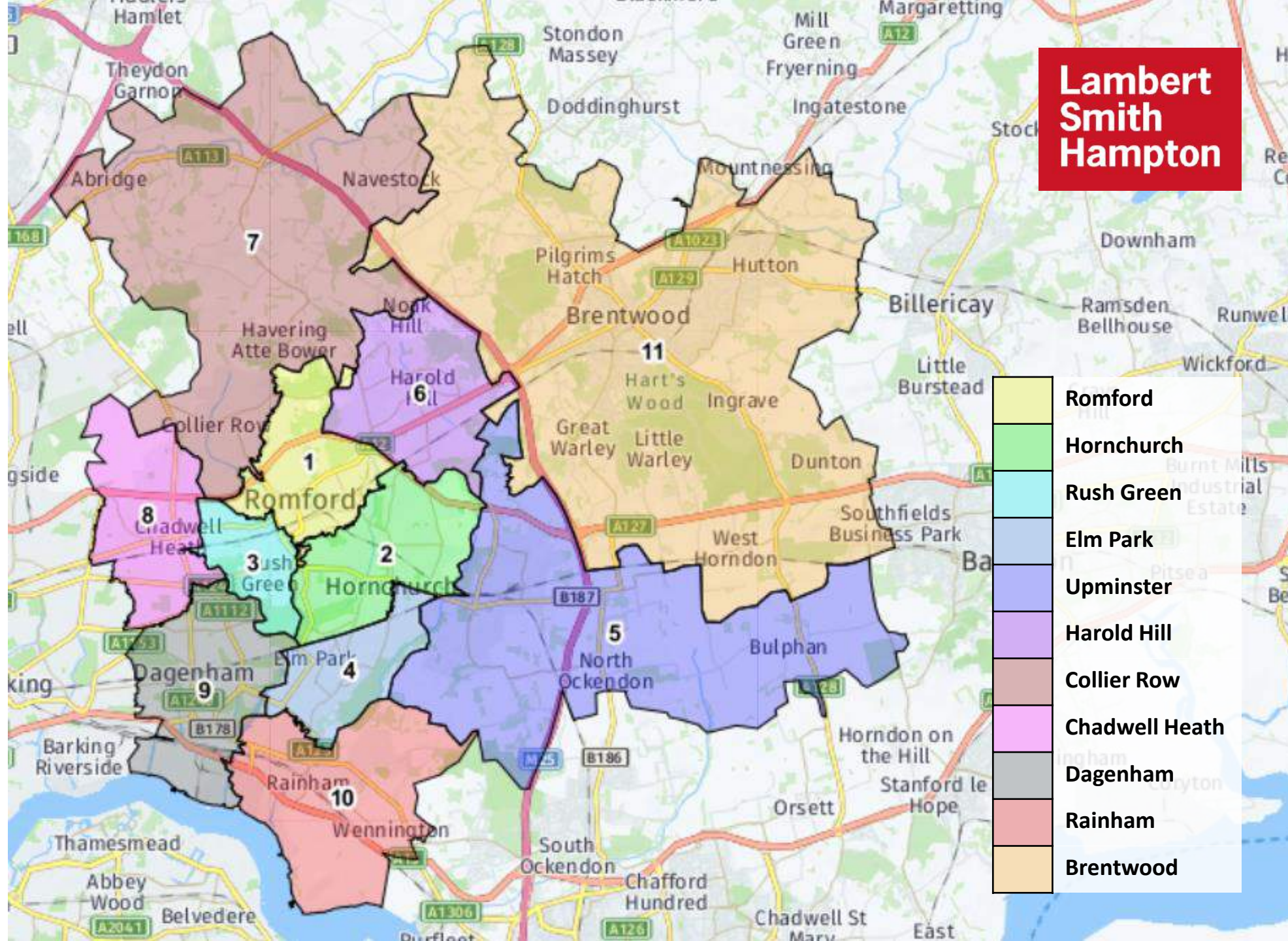
B4: MARKET SHARE ANALYSIS: COMPARISON GOODS

B5: RETAIL CAPACITY FORECASTS

B6: LEISURE EXPENDITURE

APPENDIX B1: DEFINED STUDY AREA & ZONES

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APPENDIX B2: POPULATION PROJECTIONS & EXPENDITURE GROWTH

TABLE B2.1: BASE YEAR POPULATION & PROJECTIONS (2023 - 2038) - ONS Projections (via Experian)

					Growth 2023 to 2033:		Growth 2023 to 2038:	
					%	No.	%	No.
Zone 1	Romford	42,656	43,910	44,989	5.5%	2,333	7.9%	3,379
Zone 2	Hornchurch	50,932	52,339	53,633	5.3%	2,701	7.7%	3,926
Zone 3	Rush Green	20,260	20,869	21,401	5.6%	1,141	8.3%	1,676
Zone 4	Elm Park	30,242	30,905	31,640	4.6%	1,398	6.9%	2,087
Zone 5	Upminster	29,118	29,692	30,263	3.9%	1,145	5.6%	1,631
Zone 6	Harold Hill	46,751	48,293	49,597	6.1%	2,846	8.8%	4,124
Zone 7	Collier Row	32,887	33,836	34,470	4.8%	1,583	6.7%	2,191
Zone 8	Chadwell Heath	64,913	65,392	65,926	1.6%	1,013	2.7%	1,780
Zone 9	Dagenham	69,474	70,087	70,627	1.7%	1,153	2.7%	1,877
Zone 10	Rainham	23,553	24,279	24,979	6.1%	1,426	9.0%	2,113
Zone 11	Brentwood	62,487	62,619	63,088	1.0%	601	1.9%	1,164
Total Study Area:		473,273	482,221	490,613	3.7%	17,340	5.5%	25,948
Source: Experian Business Strategies - MMG3 Geographic Information System (GIS) 'Retail Area Planner Population & Expenditure Datasets'								
Notes: Population projections (2023 to 2038) are derived from Experian and based on ONS 2018-based Sub-National Population Projections (released in June 2020).								

TABLE B2.2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2023 to 2038)

		Including SFT		Excluding Special Forms of Trading (SFT)		
		2023	2023	2028	2033	2038
Experian-based SFT Market Shares (%):			5.6%	6.8%	7.3%	7.7%
Zone 1	Romford	£2,443	£2,306	£2,274	£2,276	£2,288
Zone 2	Hornchurch	£2,420	£2,285	£2,253	£2,255	£2,267
Zone 3	Rush Green	£2,138	£2,018	£1,990	£1,992	£2,002
Zone 4	Elm Park	£2,306	£2,177	£2,146	£2,148	£2,159
Zone 5	Upminster	£2,547	£2,404	£2,371	£2,373	£2,385
Zone 6	Harold Hill	£2,257	£2,131	£2,101	£2,103	£2,114
Zone 7	Collier Row	£2,360	£2,228	£2,197	£2,199	£2,210
Zone 8	Chadwell Heath	£2,008	£1,895	£1,869	£1,871	£1,880
Zone 9	Dagenham	£1,988	£1,877	£1,850	£1,852	£1,862
Zone 10	Rainham	£2,247	£2,122	£2,092	£2,094	£2,105
Zone 11	Brentwood	£2,716	£2,564	£2,528	£2,531	£2,544

Source: Average spend per capita estimates (2021 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 20 published by Experian Business Strategies (February 2023).

Notes: At the Base Year (2023) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 20.

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 20 (February 2023).

TABLE B2.3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million) (2023 to 2038)

		Including SFT		Excluding Special Forms of Trading (SFT) (£m)			Growth 2023 to 2033 (£m)		Growth 2023 to 2038 (£m)	
		2023	2023	2028	2033	2038	%	No.	%	No.
Zone 1	Romford	£104.2	£98.4	£99.9	£102.4	£105.3	4.1%	£4.0	7.1%	£6.9
Zone 2	Hornchurch	£123.3	£116.4	£117.9	£121.0	£124.3	3.9%	£4.6	6.8%	£8.0
Zone 3	Rush Green	£43.3	£40.9	£41.5	£42.6	£43.9	4.3%	£1.7	7.4%	£3.0
Zone 4	Elm Park	£69.7	£65.8	£66.3	£68.0	£69.8	3.3%	£2.2	6.0%	£4.0
Zone 5	Upminster	£74.2	£70.0	£70.4	£71.8	£73.3	2.6%	£1.8	4.8%	£3.3
Zone 6	Harold Hill	£105.5	£99.6	£101.5	£104.3	£107.5	4.7%	£4.7	8.0%	£7.9
Zone 7	Collier Row	£77.6	£73.3	£74.3	£75.8	£77.5	3.5%	£2.5	5.8%	£4.3
Zone 8	Chadwell Heath	£130.3	£123.0	£122.2	£123.3	£125.4	0.2%	£0.3	1.9%	£2.4
Zone 9	Dagenham	£138.1	£130.4	£129.7	£130.8	£132.8	0.3%	£0.4	1.9%	£2.5
Zone 10	Rainham	£52.9	£50.0	£50.8	£52.3	£54.0	4.7%	£2.3	8.1%	£4.0
Zone 11	Brentwood	£169.7	£160.2	£158.3	£159.7	£161.9	-0.3%	-£0.6	1.0%	£1.7
Total Study Area:		£1,089.0	£1,028.0	£1,032.9	£1,052.1	£1,076.0	2.3%	£24.1	4.7%	£48.0

TABLE B2.4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2023 to 2038)

		Including SFT		Excluding Special Forms of Trading (SFT)		
		2023	2023	2028	2033	2038
Experian-based SFT Market Shares (%):			26.5%	30.0%	31.1%	32.0%
Zone 1	Romford	£3,614	£2,657	£2,811	£3,199	£3,669
Zone 2	Hornchurch	£3,651	£2,683	£2,839	£3,231	£3,705
Zone 3	Rush Green	£2,948	£2,167	£2,292	£2,609	£2,992
Zone 4	Elm Park	£3,351	£2,463	£2,606	£2,965	£3,401
Zone 5	Upminster	£3,817	£2,806	£2,968	£3,378	£3,874
Zone 6	Harold Hill	£3,094	£2,274	£2,406	£2,738	£3,140
Zone 7	Collier Row	£3,434	£2,524	£2,670	£3,039	£3,486
Zone 8	Chadwell Heath	£2,619	£1,925	£2,036	£2,317	£2,658
Zone 9	Dagenham	£2,556	£1,879	£1,987	£2,262	£2,594
Zone 10	Rainham	£3,222	£2,369	£2,506	£2,852	£3,271
Zone 11	Brentwood	£4,189	£3,079	£3,257	£3,707	£4,251

Source: Average spend per capita estimates (2021 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 20 published by Experian Business Strategies (February 2023).

Notes: At the Base Year (2023) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 20.

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 20 (February 2023).

TABLE B2.5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million) (2023 to 2038)

		Including SFT		Excluding Special Forms of Trading (SFT) (£m)			Growth 2023 to 2033 (£m)		Growth 2023 to 2038 (£m)	
		2023	2023	2028	2033	2038	%	No.	%	No.
Zone 1	Romford	£154.2	£113.3	£123.4	£143.9	£168.9	27.0%	£30.6	49.0%	£55.6
Zone 2	Hornchurch	£185.9	£136.7	£148.6	£173.3	£203.3	26.8%	£36.6	48.7%	£66.6
Zone 3	Rush Green	£59.7	£43.9	£47.8	£55.8	£65.6	27.2%	£11.9	49.5%	£21.7
Zone 4	Elm Park	£101.3	£74.5	£80.5	£93.8	£109.9	26.0%	£19.3	47.6%	£35.5
Zone 5	Upminster	£111.2	£81.7	£88.1	£102.2	£119.1	25.1%	£20.5	45.8%	£37.4
Zone 6	Harold Hill	£144.7	£106.3	£116.2	£135.8	£159.8	27.7%	£29.5	50.3%	£53.4
Zone 7	Collier Row	£112.9	£83.0	£90.4	£104.8	£122.3	26.2%	£21.7	47.3%	£39.3
Zone 8	Chadwell Heath	£170.0	£124.9	£133.2	£152.8	£177.3	22.3%	£27.8	41.9%	£52.3
Zone 9	Dagenham	£177.6	£130.5	£139.3	£159.7	£185.1	22.4%	£29.2	41.8%	£54.6
Zone 10	Rainham	£75.9	£55.8	£60.8	£71.2	£83.9	27.7%	£15.4	50.5%	£28.2
Zone 11	Brentwood	£261.7	£192.4	£204.0	£233.9	£270.6	21.6%	£41.5	40.7%	£78.2
Total Study Area:		£1,555.1	£1,143.0	£1,232.3	£1,427.2	£1,665.8	24.9%	£284.2	45.7%	£522.8

APPENDIX B3: MARKET SHARE ANALYSIS: CONVENIENCE GOODS

TABLE B3.1: TOTAL CONVENIENCE (FOOD) SHOPPING - 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Asda, Mercury Gardens	2.8%	14.1%	2.1%	3.6%	1.5%	0.0%	3.8%	2.9%	1.0%	1.1%	0.2%	0.6%
Lidl, Atlanta Boulevard	1.1%	3.6%	2.1%	2.7%	2.1%	0.3%	0.6%	0.0%	1.8%	0.1%	0.0%	0.0%
Sainsbury's, The Brewery	2.6%	9.6%	0.3%	12.1%	1.5%	0.6%	1.4%	7.4%	2.4%	0.3%	0.0%	0.0%
Other Romford Town Centre	1.5%	4.8%	1.9%	5.3%	0.4%	0.0%	2.0%	3.0%	1.2%	0.5%	0.1%	0.0%
Sub-Total Romford Metropolitan Centre	8.1%	32.1%	6.4%	23.7%	5.5%	0.9%	7.9%	13.4%	6.4%	2.0%	0.3%	0.6%
Lidl, High Street	2.9%	3.1%	13.1%	1.1%	6.9%	2.9%	0.0%	0.0%	0.9%	0.0%	4.2%	0.1%
Sainsbury's High Street	4.1%	6.1%	14.4%	0.1%	16.5%	4.7%	0.8%	0.0%	0.0%	0.2%	2.8%	0.0%
Other Hornchurch Town Centre	1.0%	0.6%	4.2%	0.0%	5.3%	0.6%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%
Sub-Total Hornchurch District Centre	8.0%	9.8%	31.8%	1.2%	28.7%	8.2%	1.0%	0.0%	0.9%	0.2%	7.2%	0.1%
Co-Op Food, Station Parade, Elm Park	0.3%	1.6%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre	0.3%	1.6%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster	1.9%	1.2%	2.3%	1.3%	2.0%	19.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster	1.5%	0.9%	2.5%	0.0%	2.4%	10.0%	0.4%	0.0%	0.2%	0.0%	2.1%	0.1%
Waitrose, St Mary's Lane, Upminster	1.6%	1.8%	0.2%	0.2%	0.9%	17.5%	0.8%	0.0%	0.0%	0.1%	0.2%	0.0%
Other Upminster Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre	5.2%	4.0%	4.9%	1.5%	5.3%	50.3%	1.1%	0.0%	0.2%	1.1%	2.3%	0.1%
Shops Harold Hill District Centre	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row	1.8%	2.8%	0.0%	0.8%	0.0%	0.3%	0.4%	18.7%	0.0%	0.2%	0.0%	0.0%
Other Collier Row Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre	1.9%	2.8%	0.0%	0.8%	0.0%	0.3%	0.4%	19.7%	0.0%	0.2%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham	2.6%	0.0%	0.0%	0.0%	6.1%	0.8%	0.0%	0.0%	0.0%	4.9%	30.3%	0.0%
Sub-Total Rainham District Centre	2.6%	0.0%	0.0%	0.0%	6.1%	0.8%	0.0%	0.0%	0.0%	4.9%	30.3%	0.0%
Sub-Total Havering Centres	26.1%	50.3%	43.1%	27.2%	47.9%	60.5%	10.5%	33.0%	7.5%	8.4%	40.1%	0.8%
Zone 1 Other	1.7%	10.7%	2.0%	1.0%	0.0%	0.6%	2.1%	2.0%	0.7%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	5.7%	4.4%	19.8%	21.6%	9.1%	2.5%	1.7%	5.8%	0.8%	2.9%	3.1%	0.0%
Zone 2 Other	1.9%	1.3%	7.3%	0.1%	3.6%	0.7%	0.2%	3.4%	1.3%	0.4%	0.0%	0.8%
Zone 3 Aldi, Rom Valley Way, Romford	1.9%	4.2%	3.5%	6.4%	2.0%	0.6%	0.7%	0.0%	1.4%	2.3%	3.6%	0.0%
Zone 3 Other	0.8%	1.1%	0.6%	8.8%	0.0%	0.0%	0.1%	1.5%	0.3%	1.1%	0.0%	0.0%
Zone 4 Tesco, Airfield Way, Hornchurch	2.2%	2.5%	3.8%	0.4%	18.9%	0.0%	0.2%	0.2%	0.0%	0.3%	1.9%	0.0%
Zone 4 Other	0.6%	0.6%	1.6%	0.0%	4.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%
Zone 5 Other	0.8%	0.0%	0.3%	0.5%	2.0%	7.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford	6.4%	7.9%	2.4%	2.7%	0.8%	5.6%	28.8%	11.4%	0.4%	0.0%	0.2%	6.6%
Zone 6 Lidl, Gooshays Drive	1.5%	0.7%	0.0%	1.0%	0.0%	0.0%	11.9%	0.2%	0.0%	0.0%	0.0%	1.6%
Zone 6 Other	2.3%	1.2%	0.0%	1.1%	0.1%	0.0%	21.9%	0.3%	0.6%	0.0%	0.8%	0.0%
Zone 7 Aldi, Collier Row Road	3.1%	2.7%	0.2%	2.5%	0.2%	0.3%	6.8%	23.9%	1.1%	0.0%	1.0%	0.2%
Zone 7 Aldi, Marlborough Road	1.7%	2.5%	1.5%	4.2%	0.3%	0.0%	2.1%	3.5%	1.6%	0.3%	0.2%	2.2%
Zone 7 Other	0.2%	0.5%	0.2%	0.1%	0.0%	0.0%	0.1%	1.9%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	7.2%	0.0%
Sub-Total Havering Borough Outside of Centres	31.2%	40.2%	43.2%	50.6%	40.8%	17.9%	76.9%	54.0%	8.3%	7.4%	18.2%	11.4%
Sub-Total Havering Borough	57.3%	90.5%	86.2%	77.8%	88.7%	78.5%	87.4%	87.1%	15.8%	15.8%	58.3%	12.2%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	1.1%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	6.8%	2.3%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath	1.7%	1.4%	0.0%	0.5%	0.0%	0.0%	0.0%	0.2%	11.8%	1.3%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes	1.9%	0.2%	1.0%	0.1%	0.2%	0.0%	0.2%	1.6%	10.9%	2.3%	0.0%	0.8%
Zone 8 Other Stores	3.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.2%	0.2%	21.0%	4.7%	0.2%	0.0%
Aldi, Merrielands Retail Park, Dagenham	1.9%	0.0%	0.0%	0.0%	0.5%	3.1%	0.0%	0.0%	0.2%	9.1%	11.7%	0.0%
Asda, Merrielands Crescent, Dagenham	2.8%	1.2%	0.0%	1.8%	0.5%	0.0%	0.0%	0.0%	4.4%	14.7%	6.7%	0.0%
Lidl, Heathway, Dagenham	1.4%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	1.1%	10.9%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath	1.4%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.3%	4.1%	6.9%	0.3%	0.0%
Zone 9 Other Stores	2.1%	0.0%	0.0%	0.1%	0.0%	0.4%	0.0%	0.0%	2.0%	16.4%	0.2%	0.0%
Sainsbury's, William Hunter Way, Brentwood	5.2%	0.2%	0.0%	0.0%	0.0%	0.2%	1.7%	0.0%	0.0%	0.0%	0.0%	32.3%
Zone 11 Other Stores	4.4%	0.0%	0.4%	0.1%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	25.2%
Other Stores Outside the Study Area	7.6%	0.6%	1.8%	4.9%	3.0%	8.5%	2.5%	2.5%	12.0%	8.8%	16.5%	17.9%
Sub-Total Havering Borough Outside of Centres	34.4%	3.6%	3.2%	15.2%	4.1%	12.3%	6.9%	4.7%	74.3%	77.3%	35.5%	76.2%
Online / internet / home delivery	8.3%	5.9%	10.6%	7.0%	7.1%	9.3%	5.7%	8.2%	9.9%	6.8%	6.2%	11.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

% Spend weighted 50% 'Main Food'; 25% 'Other main Food'; 15% 'Top-up and 10% 'Other Top-up

TABLE B3.2: MAIN FOOD SHOPPING - 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Asda, Mercury Gardens	2.7%	18.3%	1.9%	1.8%	1.0%	0.0%	2.2%	4.5%	0.4%	0.4%	0.0%	0.0%
Lidl, Atlanta Boulevard	1.5%	4.9%	3.8%	0.9%	2.4%	0.0%	0.9%	0.0%	2.9%	0.0%	0.0%	0.0%
Sainsbury's, The Brewery	2.4%	11.0%	0.0%	9.7%	1.5%	0.0%	1.3%	7.8%	1.3%	0.4%	0.0%	0.0%
Other Romford Town Centre	0.6%	1.7%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	1.3%	0.0%	0.0%	0.0%
Sub-Total Romford Metropolitan Centre	7.3%	35.8%	5.7%	12.3%	4.9%	0.0%	6.9%	12.3%	5.8%	0.7%	0.0%	0.0%
Lidl, High Street	3.0%	2.5%	13.8%	1.8%	9.9%	2.2%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Sainsbury's High Street	4.3%	4.5%	18.4%	0.0%	17.8%	5.4%	0.9%	0.0%	0.0%	0.4%	0.0%	0.0%
Other Hornchurch Town Centre	0.5%	0.0%	1.9%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Hornchurch District Centre	7.9%	7.0%	34.2%	1.8%	31.7%	7.6%	0.9%	0.0%	0.0%	0.4%	4.9%	0.0%
Co-Op Food, Station Parade, Elm Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster	1.7%	0.4%	0.8%	2.6%	0.0%	18.8%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster	0.7%	0.8%	0.4%	0.0%	0.5%	5.4%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Waitrose, St Mary's Lane, Upminster	1.7%	2.5%	0.0%	0.4%	0.0%	19.9%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Upminster Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre	4.4%	3.8%	1.2%	3.1%	0.5%	47.9%	1.3%	0.0%	0.0%	1.7%	2.7%	0.0%
Shops Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row	1.5%	4.6%	0.0%	0.9%	0.0%	0.5%	0.4%	12.5%	0.0%	0.4%	0.0%	0.0%
Other Collier Row Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre	1.5%	4.6%	0.0%	0.9%	0.0%	0.5%	0.4%	12.5%	0.0%	0.4%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham	3.2%	0.0%	0.0%	0.0%	6.5%	1.6%	0.0%	0.0%	0.0%	5.5%	39.3%	0.0%
Sub-Total Rainham District Centre	3.2%	0.0%	0.0%	0.0%	6.5%	1.6%	0.0%	0.0%	0.0%	5.5%	39.3%	0.0%
Sub-Total Havering Centres	24.3%	51.2%	41.1%	18.0%	43.6%	57.6%	9.6%	24.8%	5.8%	8.6%	46.8%	0.0%
Zone 1 Other	0.5%	2.5%	0.4%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	7.5%	7.1%	24.2%	30.2%	8.4%	2.5%	3.5%	11.2%	0.8%	3.2%	4.9%	0.0%
Zone 2 Other	0.6%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%
Zone 3 Aldi, Rom Valley Way, Romford	1.7%	1.3%	0.8%	7.1%	2.5%	0.0%	1.3%	0.0%	2.1%	4.4%	2.6%	0.0%
Zone 3 Other	0.5%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	1.9%	0.0%	2.1%	0.0%	0.0%
Zone 4 Tesco, Airfield Way, Hornchurch	2.7%	5.0%	2.3%	0.9%	25.8%	0.0%	0.4%	0.4%	0.0%	0.4%	0.9%	0.0%
Zone 4 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford	7.9%	11.0%	3.2%	4.7%	1.5%	4.3%	41.3%	15.3%	0.0%	0.0%	0.0%	3.8%
Zone 6 Lidl, Gooshays Drive	1.1%	0.4%	0.0%	2.1%	0.0%	0.0%	6.5%	0.0%	0.0%	0.0%	0.0%	2.4%
Zone 6 Other	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	7.5%	0.0%	1.3%	0.0%	0.0%	0.0%
Zone 7 Aldi, Collier Row Road	3.6%	2.1%	0.4%	3.1%	0.0%	0.5%	9.4%	27.1%	2.0%	0.0%	0.0%	0.0%
Zone 7 Aldi, Marlborough Road	2.2%	3.8%	2.8%	6.9%	0.5%	0.0%	2.6%	1.6%	2.9%	0.7%	0.5%	2.2%
Zone 7 Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Borough Outside of Centres	29.3%	33.3%	38.0%	56.7%	38.8%	7.4%	75.2%	60.4%	9.1%	10.7%	8.8%	8.4%
Sub-Total Havering Borough	53.6%	84.5%	79.0%	74.8%	82.4%	65.0%	84.8%	85.2%	14.9%	19.3%	55.6%	8.4%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	1.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	4.2%	3.7%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath	2.3%	0.8%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	17.5%	2.0%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes	2.4%	0.0%	2.0%	0.0%	0.0%	0.0%	0.4%	0.0%	14.3%	3.7%	0.0%	0.5%
Zone 8 Other Stores	2.6%	0.0%	0.0%	4.4%	0.0%	0.0%	0.4%	0.0%	16.5%	4.4%	0.0%	0.0%
Aldi, Merrilands Retail Park, Dagenham	2.2%	0.0%	0.0%	0.0%	0.5%	6.3%	0.0%	0.0%	0.0%	9.4%	11.5%	0.0%
Asda, Merrilands Crescent, Dagenham	3.6%	2.4%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	6.4%	18.3%	5.7%	0.0%
Lidl, Heathway, Dagenham	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.5%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	6.1%	7.7%	0.5%	0.0%
Zone 9 Other Stores	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%
Sainsbury's, William Hunter Way, Brentwood	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	38.9%
Zone 11 Other Stores	1.3%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%
Other Stores Outside the Study Area	7.6%	0.9%	0.8%	4.7%	2.9%	10.6%	0.9%	2.0%	8.3%	9.0%	17.0%	21.5%
Sub-Total Havering Borough Outside of Centres	32.7%	4.1%	3.2%	12.2%	4.4%	16.9%	5.3%	2.5%	73.2%	73.4%	34.7%	69.7%
(Don't do this type of shopping)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Online / internet / home delivery	13.7%	11.4%	17.8%	13.0%	13.2%	18.1%	10.0%	12.3%	11.9%	7.3%	9.7%	21.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B3.3: OTHER MAIN FOOD SHOPPING - 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Asda, Mercury Gardens	3.5%	17.6%	2.9%	7.5%	1.5%	0.0%	2.7%	0.0%	2.7%	3.6%	0.0%	0.0%
Lidl, Atlanta Boulevard	0.8%	3.8%	0.6%	6.5%	1.5%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, The Brewery	2.9%	9.8%	0.6%	15.0%	0.0%	2.2%	2.7%	5.2%	4.8%	0.6%	0.0%	0.0%
Other Romford Town Centre	2.5%	9.2%	4.1%	11.3%	0.7%	0.0%	1.4%	4.5%	0.7%	0.6%	0.0%	0.0%
Sub-Total Romford Metropolitan Centre	9.8%	40.4%	8.2%	40.3%	3.6%	3.4%	6.8%	9.8%	8.2%	4.9%	0.0%	0.0%
Lidl, High Street	3.9%	7.1%	13.7%	1.0%	5.8%	6.7%	0.0%	0.0%	3.2%	0.0%	5.5%	0.0%
Sainsbury's High Street	4.7%	13.1%	10.8%	0.0%	15.3%	4.6%	1.4%	0.0%	0.0%	0.0%	9.0%	0.0%
Other Hornchurch Town Centre	1.5%	0.0%	7.8%	0.0%	4.4%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Hornchurch District Centre	10.1%	20.2%	32.3%	1.0%	25.5%	13.6%	1.4%	0.0%	3.2%	0.0%	14.6%	0.0%
Co-Op Food, Station Parade, Elm Park	0.7%	3.9%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre	0.7%	3.9%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster	2.8%	3.9%	4.2%	0.0%	4.9%	26.8%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster	2.2%	2.0%	4.8%	0.0%	7.1%	11.3%	1.4%	0.0%	0.7%	0.0%	0.8%	0.0%
Waitrose, St Mary's Lane, Upminster	0.9%	0.0%	0.6%	0.0%	3.4%	10.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Other Upminster Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre	6.2%	5.9%	9.7%	0.0%	15.5%	52.8%	1.4%	0.0%	0.7%	0.6%	1.7%	0.0%
Shops Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row	1.7%	0.0%	0.0%	1.0%	0.0%	0.0%	0.7%	20.7%	0.0%	0.0%	0.0%	0.0%
Other Collier Row Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre	1.7%	0.0%	0.0%	1.0%	0.0%	0.0%	0.7%	20.7%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham	2.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	6.2%	16.2%	0.0%
Sub-Total Rainham District Centre	2.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	6.2%	16.2%	0.0%
Sub-Total Havering Centres	30.4%	70.4%	50.1%	42.2%	56.2%	69.8%	10.3%	30.5%	12.1%	11.7%	32.5%	0.0%
Zone 1 Other	0.4%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	5.7%	3.3%	21.3%	17.9%	13.6%	2.3%	0.0%	0.7%	1.4%	4.3%	2.5%	0.0%
Zone 2 Other	1.5%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	7.2%	3.2%	0.0%	0.0%	0.0%
Zone 3 Aldi, Rom Valley Way, Romford	2.7%	7.9%	7.1%	6.6%	2.2%	2.2%	0.0%	0.0%	1.4%	0.0%	8.7%	0.0%
Zone 3 Other	0.2%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Zone 4 Tesco, Airfield Way, Hornchurch	1.3%	0.0%	4.1%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%
Zone 4 Other	0.4%	0.7%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford	7.3%	5.2%	2.9%	1.0%	0.0%	7.9%	20.1%	10.2%	1.4%	0.0%	0.8%	18.8%
Zone 6 Lidl, Gooshays Drive	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	24.1%	0.7%	0.0%	0.0%	0.0%	1.5%
Zone 6 Other	2.3%	0.0%	0.0%	4.5%	0.0%	0.0%	20.1%	0.7%	0.0%	0.0%	0.0%	0.0%
Zone 7 Aldi, Collier Row Road	2.3%	0.7%	0.0%	2.8%	0.7%	0.0%	4.8%	21.1%	0.0%	0.0%	0.0%	0.0%
Zone 7 Aldi, Marlborough Road	1.6%	2.0%	0.0%	2.8%	0.0%	0.0%	2.7%	5.3%	0.0%	0.0%	0.0%	4.3%
Zone 7 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Sub-Total Havering Borough Outside of Centres	28.8%	21.1%	39.3%	35.6%	31.6%	12.4%	71.7%	49.8%	8.0%	4.3%	17.6%	24.6%
Sub-Total Havering Borough	59.2%	91.5%	89.4%	77.8%	87.8%	82.2%	82.0%	80.3%	20.0%	16.0%	50.0%	24.6%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	1.7%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	14.5%	0.0%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath	0.9%	3.9%	0.0%	1.0%	0.0%	0.0%	0.0%	0.7%	3.4%	0.0%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes	1.7%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	4.0%	6.8%	1.9%	0.0%	2.2%
Zone 8 Other Stores	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.2%	3.6%	0.0%	0.0%
Aldi, Merriellands Retail Park, Dagenham	2.6%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.7%	14.2%	19.1%	0.0%
Asda, Merriellands Crescent, Dagenham	2.9%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	17.8%	14.7%	0.0%
Lidl, Heathway, Dagenham	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	17.6%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath	0.8%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	2.7%	2.9%	0.0%	0.0%
Zone 9 Other Stores	2.2%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	3.2%	15.5%	0.0%	0.0%
Sainsbury's, William Hunter Way, Brentwood	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	36.7%
Zone 11 Other Stores	3.5%	0.0%	0.6%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	18.7%
Other Stores Outside the Study Area	7.5%	0.7%	4.1%	7.4%	2.9%	7.9%	3.2%	4.7%	13.9%	4.8%	11.4%	17.8%
Sub-Total Havering Borough Outside of Centres	34.6%	4.6%	4.7%	21.3%	4.4%	9.1%	7.9%	9.3%	69.4%	78.1%	45.1%	75.4%
(Don't do this type of shopping)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Online / internet / home delivery	6.2%	4.0%	5.9%	1.0%	7.7%	8.7%	10.1%	10.4%	10.6%	5.8%	4.8%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B3.4: TOP FOOD SHOPPING - 2023 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Store /Centre	Town	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
			Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Asda, Mercury Gardens		1.2%	1.2%	2.8%	3.7%	0.0%	0.0%	4.0%	3.1%	0.0%	0.0%	0.0%	0.0%
Lidl, Atlanta Boulevard		0.8%	1.2%	0.0%	0.7%	3.3%	0.0%	1.4%	0.0%	2.6%	0.5%	0.0%	0.0%
Sainsburys, The Brewery		2.1%	9.1%	0.6%	14.0%	0.0%	0.0%	0.0%	3.0%	3.3%	0.0%	0.0%	0.0%
Other Romford Town Centre		1.9%	4.3%	1.2%	4.6%	0.7%	0.0%	1.4%	10.2%	0.6%	1.0%	0.6%	0.0%
Sub-Total Romford Metropolitan Centre		6.0%	15.9%	4.6%	23.0%	4.0%	0.0%	6.7%	16.4%	6.4%	1.5%	0.6%	0.0%
Lidl, High Street		1.1%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's High Street		3.1%	3.0%	14.9%	0.0%	11.0%	3.5%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%
Other Hornchurch Town Centre		1.7%	3.1%	7.0%	0.0%	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Sub-Total Hornchurch District Centre		5.9%	6.1%	32.0%	0.0%	20.7%	3.5%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%
Co-Op Food, Station Parade, Elm Park		0.5%	3.6%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre		0.5%	3.6%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster		0.6%	0.0%	0.6%	0.0%	0.7%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster		2.1%	0.0%	6.6%	0.0%	0.7%	15.8%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%
Waitrose, St Mary's Lane, Upminster		1.9%	3.6%	0.0%	0.0%	0.0%	20.8%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Upminster Town Centre		0.2%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre		4.8%	3.6%	7.2%	0.0%	1.4%	45.7%	0.7%	0.0%	0.0%	0.0%	3.7%	0.0%
Shops Harold Hill District Centre		0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre		0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row		2.5%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	31.0%	0.0%	0.0%	0.0%	0.0%
Other Collier Row Town Centre		0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre		2.9%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	35.7%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham		2.8%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	3.5%	41.8%	0.0%
Sub-Total Rainham District Centre		2.8%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	3.5%	41.8%	0.0%
Sub-Total Havering Centres		23.0%	29.9%	43.8%	23.7%	33.7%	49.2%	8.1%	52.1%	6.4%	5.0%	49.9%	0.0%
Zone 1 Other		4.8%	42.0%	1.8%	5.2%	0.0%	0.0%	4.1%	3.6%	0.0%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch		2.0%	0.0%	10.0%	11.4%	3.5%	1.4%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Zone 2 Other		5.1%	3.6%	20.0%	0.0%	5.4%	3.3%	1.4%	3.1%	2.6%	3.0%	0.0%	5.5%
Zone 3 Aldi, Rom Valley Way, Romford		0.8%	4.3%	3.4%	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 Other		1.7%	1.2%	0.0%	38.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.5%	0.0%	0.0%
Zone 4 Tesco, Airfield Way, Hornchurch		2.8%	0.0%	9.2%	0.0%	23.5%	0.0%	0.0%	0.0%	0.0%	0.5%	2.9%	0.0%
Zone 4 Other		1.4%	2.9%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Zone 5 Other		3.7%	0.0%	1.2%	0.0%	8.2%	39.4%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford		1.7%	3.5%	0.0%	0.7%	0.0%	0.0%	14.8%	1.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Lidl, Gooshays Drive		1.2%	3.0%	0.0%	0.0%	0.0%	0.0%	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Other		4.6%	3.6%	0.0%	0.0%	0.7%	0.0%	47.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 Aldi, Collier Row Road		2.2%	2.9%	0.0%	0.0%	0.0%	0.0%	4.1%	19.7%	0.0%	0.0%	0.0%	0.0%
Zone 7 Aldi, Mariborough Road		0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.1%	0.0%	0.0%	0.0%
Zone 7 Other		1.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.7%	9.7%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other		1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	23.3%	0.0%
Sub-Total Havering Borough Outside of Centres		34.5%	67.7%	46.9%	55.8%	58.8%	44.1%	85.0%	37.7%	3.7%	5.0%	27.5%	5.5%
Sub-Total Havering Borough		57.5%	97.6%	90.7%	79.5%	92.5%	93.2%	93.1%	89.8%	10.1%	10.0%	77.4%	5.5%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath		0.7%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	2.2%	2.4%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath		1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.7%	1.0%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes		1.0%	1.2%	0.0%	0.7%	0.0%	0.0%	0.0%	3.1%	4.9%	0.0%	0.0%	0.0%
Zone 8 Other Stores		4.8%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	1.0%	30.4%	8.3%	0.0%	0.0%
Aldi, Merrilands Retail Park, Dagenham		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.6%	0.0%
Asda, Merrilands Crescent, Dagenham		0.6%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	2.6%	2.5%	0.0%	0.0%
Lidl, Heathway, Dagenham		1.6%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	12.1%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath		1.6%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	2.2%	9.8%	0.6%	0.0%
Zone 9 Other Stores		4.7%	0.0%	0.0%	0.7%	0.0%	0.7%	0.0%	0.0%	3.1%	35.3%	0.0%	0.0%
Sainsbury's, William Hunter Way, Brentwood		2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.8%
Zone 11 Other Stores		11.8%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	71.5%
Other Stores Outside the Study Area		6.6%	0.0%	2.4%	0.7%	4.2%	5.4%	6.9%	0.5%	18.6%	7.7%	13.3%	7.6%
Sub-Total Havering Borough Outside of Centres		38.0%	1.2%	2.4%	17.3%	4.2%	6.1%	6.9%	4.7%	77.8%	82.8%	14.6%	93.9%
(Don't do this type of shopping)		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Don't know / varies)		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Nowhere else)		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Online / internet / home delivery		4.5%	1.2%	6.9%	3.2%	3.3%	0.7%	0.0%	5.5%	12.2%	7.2%	8.0%	0.6%
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B3.5: OTHER TOP FOOD SHOPPING - 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Town	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Store /Centre	Total Zones	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Asda, Mercury Gardens	3.1%	1.6%	0.0%	2.2%	5.7%	0.0%	13.2%	2.1%	0.0%	0.0%	1.7%	5.7%
Lidl, Atlanta Boulevard	0.3%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, The Brewery	2.9%	1.6%	0.0%	13.8%	7.8%	0.0%	0.0%	16.3%	0.0%	0.0%	0.0%	0.0%
Other Romford Town Centre	3.1%	9.3%	6.4%	17.3%	1.2%	0.0%	1.5%	2.1%	2.8%	1.4%	0.0%	0.0%
Sub-Total Romford Metropolitan Centre	9.4%	12.4%	6.4%	38.7%	14.7%	0.0%	14.7%	20.5%	2.8%	1.4%	1.7%	5.7%
Lidl, High Street	1.8%	0.0%	10.5%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	1.2%
Sainsbury's High Street	2.0%	0.0%	1.4%	1.1%	18.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Hornchurch Town Centre	1.0%	1.6%	1.4%	0.0%	6.6%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Hornchurch District Centre	4.8%	1.6%	13.3%	1.1%	28.4%	2.2%	1.5%	0.0%	0.0%	0.0%	3.3%	1.2%
Co-Op Food, Station Parade, Elm Park	0.7%	0.0%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre	0.7%	0.0%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster	2.5%	0.0%	6.8%	0.0%	5.8%	12.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster	2.1%	0.0%	0.0%	0.0%	1.2%	18.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Waitrose, St Mary's Lane, Upminster	1.8%	0.0%	0.0%	0.0%	0.0%	16.5%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Other Upminster Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre	6.6%	0.0%	6.8%	0.0%	6.9%	50.0%	0.0%	0.0%	0.0%	1.4%	0.0%	1.2%
Shops Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row	2.2%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	20.4%	0.0%	0.0%	0.0%	0.0%
Other Collier Row Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre	2.3%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	22.5%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Sub-Total Rainham District Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Sub-Total Havering Centres	23.9%	18.6%	26.4%	39.8%	58.0%	52.2%	16.2%	43.1%	2.8%	2.8%	6.7%	8.1%
Zone 1 Other	5.6%	27.7%	15.5%	2.2%	0.0%	6.3%	1.5%	3.2%	6.6%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	1.8%	0.0%	5.5%	3.3%	6.9%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 Other	4.0%	7.7%	24.4%	1.1%	6.6%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 Aldi, Rom Valley Way, Romford	2.1%	9.2%	6.8%	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Zone 3 Other	2.7%	9.1%	2.7%	22.6%	0.0%	0.0%	0.0%	4.9%	1.4%	0.0%	0.0%	1.0%
Zone 4 Tesco, Airfield Way, Hornchurch	0.6%	0.0%	1.4%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 Other	2.3%	0.0%	8.1%	0.0%	14.9%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 Other	2.7%	0.0%	1.4%	5.4%	7.8%	16.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford	2.5%	4.6%	0.0%	0.0%	0.0%	13.1%	3.0%	7.2%	0.0%	0.0%	0.0%	0.0%
Zone 6 Lidl, Gooshays Drive	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Other	5.7%	6.2%	0.0%	0.0%	0.0%	0.0%	54.5%	1.1%	0.0%	0.0%	7.8%	0.0%
Zone 7 Aldi, Collier Row Road	3.4%	10.7%	0.0%	2.2%	0.0%	0.0%	1.5%	15.3%	1.4%	0.0%	9.7%	2.4%
Zone 7 Aldi, Marlborough Road	1.1%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%
Zone 7 Other	0.4%	4.6%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	33.0%	0.0%
Sub-Total Havering Borough Outside of Centres	36.6%	79.8%	67.2%	48.8%	40.8%	42.3%	66.5%	42.9%	9.5%	1.4%	50.5%	2.4%
Sub-Total Havering Borough	60.5%	98.4%	93.6%	88.6%	98.8%	94.5%	82.7%	86.0%	12.3%	4.2%	57.2%	10.5%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	0.5%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	2.8%	1.4%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%
Zone 8 Other Stores	3.1%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	25.2%	2.8%	1.7%	0.0%
Aldi, Merrields Retail Park, Dagenham	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	8.2%	0.0%
Asda, Merrields Crescent, Dagenham	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	4.2%	0.0%	0.0%
Lidl, Heathway, Dagenham	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	7.9%	0.0%	0.0%
Zone 9 Other Stores	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	35.3%	1.7%	0.0%
Sainsbury's, William Hunter Way, Brentwood	2.8%	1.6%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%
Zone 11 Other Stores	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%	53.8%
Other Stores Outside the Study Area	7.6%	0.0%	0.0%	5.1%	1.2%	2.2%	1.5%	1.1%	12.3%	18.8%	29.6%	15.6%
Sub-Total Havering Borough Outside of Centres	31.9%	1.6%	0.0%	11.4%	1.2%	4.4%	10.3%	2.1%	66.2%	74.6%	41.1%	83.8%
(Don't do this type of shopping)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Online / internet / home delivery	7.6%	0.0%	6.4%	0.0%	0.0%	1.1%	7.0%	11.9%	21.5%	21.2%	1.7%	5.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B3.6: TOTAL CONVENIENCE (FOOD) SHOPPING - 2023 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1 Romford	Zone 2 Hornchurch	Zone 3 Rush Green	Zone 4 Elm Park	Zone 5 Upminster	Zone 6 Harold Hill	Zone 7 Collier Row	Zone 8 Chadwell Heath	Zone 9 Dagenham	Zone 10 Rainham	Zone 11 Brentwood
Asda, Mercury Gardens	3.1%	14.9%	2.4%	3.8%	1.6%	0.0%	4.0%	3.2%	1.1%	1.2%	0.2%	0.6%
Lidl, Atlanta Boulevard	1.2%	3.8%	2.3%	2.9%	2.2%	0.3%	0.7%	0.0%	2.0%	0.1%	0.0%	0.0%
Sainsburys, The Brewery	2.8%	10.2%	0.3%	13.0%	1.6%	0.7%	1.5%	8.1%	2.7%	0.4%	0.0%	0.0%
Other Romford Town Centre	1.7%	5.1%	2.1%	5.7%	0.5%	0.0%	2.1%	3.3%	1.3%	0.5%	0.1%	0.0%
Sub-Total Romford Metropolitan Centre	8.8%	34.1%	7.1%	25.4%	5.9%	1.0%	8.3%	14.6%	7.2%	2.2%	0.3%	0.6%
Lidl, High Street	3.2%	3.3%	14.7%	1.2%	7.4%	3.2%	0.0%	0.0%	1.0%	0.0%	4.5%	0.1%
Sainsbury's High Street	4.5%	6.5%	16.1%	0.1%	17.8%	5.2%	0.9%	0.0%	0.0%	0.2%	3.0%	0.0%
Other Hornchurch Town Centre	1.1%	0.7%	4.7%	0.0%	5.7%	0.7%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%
Sub-Total Hornchurch District Centre	8.7%	10.4%	35.5%	1.3%	30.9%	9.1%	1.0%	0.0%	1.0%	0.2%	7.7%	0.1%
Co-Op Food, Station Parade, Elm Park	0.4%	1.7%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Elm Park District Centre	0.4%	1.7%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, St Mary's Lane, Upminster	2.1%	1.3%	2.6%	1.4%	2.2%	20.9%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%
Marks & Spencer, Station Road, Upminster	1.6%	1.0%	2.8%	0.0%	2.6%	11.0%	0.4%	0.0%	0.2%	0.0%	2.3%	0.1%
Waitrose, St Mary's Lane, Upminster	1.7%	1.9%	0.2%	0.2%	1.0%	19.3%	0.8%	0.0%	0.0%	0.2%	0.2%	0.0%
Other Upminster Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Upminster District Centre	5.7%	4.2%	5.5%	1.6%	5.8%	55.4%	1.2%	0.0%	0.2%	1.2%	2.5%	0.1%
Shops Harold Hill District Centre	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Harold Hill District Centre	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Collier Row Lane, Collier Row	2.0%	3.0%	0.0%	0.8%	0.0%	0.3%	0.4%	20.4%	0.0%	0.2%	0.0%	0.0%
Other Collier Row Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Collier Row District Centre	2.1%	3.0%	0.0%	0.8%	0.0%	0.3%	0.4%	21.4%	0.0%	0.2%	0.0%	0.0%
Tesco Extra, Bridge Road, Rainham	2.8%	0.0%	0.0%	0.0%	6.5%	0.9%	0.0%	0.0%	0.0%	5.3%	32.3%	0.0%
Sub-Total Rainham District Centre	2.8%	0.0%	0.0%	0.0%	6.5%	0.9%	0.0%	0.0%	0.0%	5.3%	32.3%	0.0%
Sub-Total Havering Centres	28.4%	53.4%	48.1%	29.3%	51.6%	66.7%	11.1%	36.0%	8.4%	9.1%	42.8%	0.9%
Zone 1 Other	1.8%	11.3%	2.3%	1.1%	0.0%	0.7%	2.2%	2.1%	0.7%	0.0%	0.0%	0.0%
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	6.2%	4.7%	22.1%	23.3%	9.8%	2.8%	1.8%	6.3%	0.9%	3.1%	3.3%	0.0%
Zone 2 Other	2.0%	1.4%	8.2%	0.1%	3.9%	0.8%	0.2%	3.7%	1.4%	0.5%	0.0%	0.9%
Zone 3 Aldi, Rom Valley Way, Romford	2.1%	4.5%	3.9%	6.9%	2.1%	0.7%	0.7%	0.0%	1.6%	2.5%	3.8%	0.0%
Zone 3 Other	0.9%	1.2%	0.7%	9.5%	0.0%	0.0%	0.1%	1.6%	0.4%	1.2%	0.0%	0.0%
Zone 4 Tesco, Airfield Way, Hornchurch	2.4%	2.7%	4.2%	0.5%	20.3%	0.0%	0.2%	0.2%	0.0%	0.3%	2.0%	0.0%
Zone 4 Other	0.6%	0.6%	1.8%	0.0%	4.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%
Zone 5 Other	0.9%	0.0%	0.4%	0.6%	2.2%	8.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Tesco Extra, Bryant Avenue, Romford	7.0%	8.3%	2.6%	2.9%	0.8%	6.2%	30.5%	12.4%	0.4%	0.0%	0.2%	7.4%
Zone 6 Lidl, Gooshays Drive	1.7%	0.7%	0.0%	1.1%	0.0%	0.0%	12.6%	0.2%	0.0%	0.0%	0.0%	1.8%
Zone 6 Other	2.5%	1.2%	0.0%	1.2%	0.1%	0.0%	23.2%	0.3%	0.7%	0.0%	0.8%	0.0%
Zone 7 Aldi, Collier Row Road	3.4%	2.9%	0.2%	2.6%	0.2%	0.3%	7.2%	26.1%	1.3%	0.0%	1.0%	0.3%
Zone 7 Aldi, Marlborough Road	1.8%	2.7%	1.7%	4.5%	0.3%	0.0%	2.2%	3.8%	1.8%	0.4%	0.2%	2.5%
Zone 7 Other	0.2%	0.5%	0.2%	0.1%	0.0%	0.0%	0.1%	2.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 Out Other	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	7.7%	0.0%
Sub-Total Havering Borough Outside of Centres	34.0%	42.8%	48.3%	54.4%	44.0%	19.8%	81.6%	58.9%	9.2%	7.9%	19.4%	12.9%
Sub-Total Havering Borough	62.4%	96.2%	96.4%	83.6%	95.5%	86.5%	92.7%	94.8%	17.5%	17.0%	62.2%	13.8%
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	1.2%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	7.5%	2.5%	0.0%	0.0%
Zone 8 Sainsbury's, High Road, Chadwell Heath	1.8%	1.5%	0.0%	0.5%	0.0%	0.0%	0.0%	0.2%	13.1%	1.4%	0.0%	0.0%
Zone 8 Tesco, High Road, Goodmayes	2.1%	0.2%	1.1%	0.1%	0.2%	0.0%	0.2%	1.7%	12.1%	2.5%	0.0%	0.9%
Zone 8 Other Stores	3.3%	0.0%	0.0%	3.3%	0.0%	0.0%	0.2%	0.2%	23.3%	5.0%	0.2%	0.0%
Aldi, Merrilands Retail Park, Dagenham	2.1%	0.0%	0.0%	0.0%	0.5%	3.4%	0.0%	0.0%	0.2%	9.8%	12.5%	0.0%
Asda, Merrilands Crescent, Dagenham	3.0%	1.3%	0.0%	1.9%	0.5%	0.0%	0.0%	4.9%	15.8%	7.1%	0.0%	0.0%
Lidl, Heathway, Dagenham	1.6%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	1.2%	11.7%	0.0%	0.0%	0.0%
Morrisons, Wood Lane, Beacontree Heath	1.5%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.3%	4.6%	7.4%	0.3%	0.0%
Zone 9 Other Stores	2.3%	0.0%	0.0%	0.1%	0.0%	0.5%	0.0%	0.0%	2.3%	17.6%	0.2%	0.0%
Sainsbury's, William Hunter Way, Brentwood	5.7%	0.2%	0.0%	0.0%	0.0%	0.2%	1.8%	0.0%	0.0%	0.0%	0.0%	36.5%
Zone 11 Other Stores	4.8%	0.0%	0.4%	0.1%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	28.5%
Other Stores Outside the Study Area	8.2%	0.6%	2.1%	5.2%	3.2%	9.4%	2.7%	2.7%	13.4%	9.5%	17.6%	20.3%
Sub-Total Havering Borough Outside of Centres	37.6%	3.8%	3.6%	16.4%	4.5%	13.5%	7.3%	5.2%	82.5%	83.0%	37.9%	86.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B3.7: TOTAL CONVENIENCE (FOOD) SHOPPING SPEND 2023

Excluding Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1 Romford	Zone 2 Hornchurch	Zone 3 Rush Green	Zone 4 Elm Park	Zone 5 Upminster	Zone 6 Harold Hill	Zone 7 Collier Row	Zone 8 Chadwell Heath	Zone 9 Dagenham	Zone 10 Rainham	Zone 11 Brentwood	Total Zones
Available Expenditure 2023 (£m)	£98.4	£116.4	£40.9	£65.8	£70.0	£99.6	£73.3	£123.0	£130.4	£50.0	£160.2	£1,028.0
Asda, Mercury Gardens	£14.7	£2.8	£1.6	£1.0	£0.0	£4.0	£2.3	£1.3	£1.6	£0.1	£1.0	£30.5
Lidl, Atlanta Boulevard	£3.8	£2.7	£1.2	£1.5	£0.2	£0.7	£0.0	£2.5	£0.1	£0.0	£0.0	£12.6
Sainsbury's, The Brewery	£10.0	£0.3	£5.3	£1.1	£0.5	£1.5	£5.9	£3.3	£0.5	£0.0	£0.0	£28.5
Other Romford Town Centre	£5.0	£2.5	£2.3	£0.3	£0.0	£2.1	£2.4	£1.6	£0.6	£0.1	£0.0	£17.0
Sub-Total Romford Metropolitan Centre	£33.5	£8.3	£10.4	£3.9	£0.7	£8.3	£10.7	£8.8	£2.8	£0.1	£1.0	£88.6
Lidl, High Street	£3.2	£17.1	£0.5	£4.9	£2.3	£0.0	£0.0	£1.2	£0.0	£2.3	£0.2	£31.6
Sainsbury's High Street	£6.4	£18.8	£0.0	£11.7	£3.6	£0.9	£0.0	£0.0	£0.2	£1.5	£0.0	£43.2
Other Hornchurch Town Centre	£0.6	£5.5	£0.0	£3.8	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£10.6
Sub-Total Hornchurch District Centre	£10.3	£41.3	£0.5	£20.4	£6.4	£1.0	£0.0	£1.2	£0.2	£3.8	£0.2	£85.4
Co-Op Food, Station Parade, Elm Park	£1.6	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2
Sub-Total Elm Park District Centre	£1.6	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2
Aldi, St Mary's Lane, Upminster	£1.3	£3.0	£0.6	£1.4	£14.6	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£22.3
Marks & Spencer, Station Road, Upminster	£1.0	£3.2	£0.0	£1.7	£7.7	£0.4	£0.0	£0.3	£0.0	£1.1	£0.2	£15.6
Waitrose, St Mary's Lane, Upminster	£1.9	£0.2	£0.1	£0.7	£13.5	£0.8	£0.0	£0.0	£0.2	£0.1	£0.0	£17.5
Other Upminster Town Centre	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9
Sub-Total Upminster District Centre	£4.1	£6.4	£0.7	£3.8	£38.8	£1.2	£0.0	£0.3	£1.6	£1.2	£0.2	£58.3
Shops Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Sub-Total Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Tesco, Collier Row Lane, Collier Row	£2.9	£0.0	£0.3	£0.0	£0.2	£0.4	£15.0	£0.0	£0.2	£0.0	£0.0	£19.1
Other Collier Row Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7
Sub-Total Collier Row District Centre	£2.9	£0.0	£0.3	£0.0	£0.2	£0.4	£15.7	£0.0	£0.2	£0.0	£0.0	£19.8
Tesco Extra, Bridge Road, Rainham	£0.0	£0.0	£0.0	£4.3	£0.6	£0.0	£0.0	£0.0	£6.9	£16.2	£0.0	£28.0
Sub-Total Rainham District Centre	£0.0	£0.0	£0.0	£4.3	£0.6	£0.0	£0.0	£0.0	£6.9	£16.2	£0.0	£28.0
Sub-Total Havering Centres	£52.6	£56.0	£12.0	£33.9	£46.7	£11.1	£26.4	£10.3	£11.8	£21.4	£1.5	£283.6
Zone 1 Other	£11.1	£2.6	£0.4	£0.0	£0.5	£2.2	£1.6	£0.9	£0.0	£0.0	£0.0	£19.4
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	£4.6	£25.8	£9.5	£6.5	£2.0	£1.8	£4.6	£1.1	£4.0	£1.6	£0.0	£61.5
Zone 2 Other	£1.4	£9.6	£0.0	£2.5	£0.5	£0.2	£2.7	£1.8	£0.6	£0.0	£1.5	£20.9
Zone 3 Aldi, Rom Valley Way, Romford	£4.4	£4.5	£2.8	£1.4	£0.5	£0.7	£0.0	£1.9	£3.3	£1.9	£0.0	£21.5
Zone 3 Other	£1.1	£0.8	£3.9	£0.0	£0.0	£0.1	£1.2	£0.5	£1.6	£0.0	£0.0	£9.1
Zone 4 Tesco, Airfield Way, Hornchurch	£2.6	£4.9	£0.2	£13.4	£0.0	£0.2	£0.0	£0.0	£0.4	£1.0	£0.0	£22.8
Zone 4 Other	£0.6	£2.0	£0.0	£2.8	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£5.8
Zone 5 Other	£0.0	£0.4	£0.2	£1.4	£5.8	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.1
Zone 6 Tesco Extra, Bryant Avenue, Romford	£8.2	£3.1	£1.2	£0.5	£4.3	£30.4	£9.1	£0.5	£0.0	£0.1	£11.9	£69.4
Zone 6 Lidl, Gooshays Drive	£0.7	£0.0	£0.5	£0.0	£0.0	£12.6	£0.2	£0.0	£0.0	£0.0	£2.8	£16.7
Zone 6 Other	£1.2	£0.0	£0.5	£0.1	£0.0	£23.1	£0.2	£0.9	£0.0	£0.4	£0.0	£26.4
Zone 7 Aldi, Collier Row Road	£2.9	£0.3	£1.1	£0.1	£0.2	£7.1	£19.1	£1.5	£0.0	£0.5	£0.4	£33.3
Zone 7 Aldi, Marlborough Road	£2.6	£2.0	£1.8	£0.2	£0.0	£2.2	£2.8	£2.2	£0.5	£0.1	£4.0	£18.4
Zone 7 Other	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£1.5	£0.0	£0.0	£0.0	£0.0	£2.4
Zone 10 Out Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£3.9	£0.0	£4.0
Sub-Total Havering Borough Outside of Centres	£42.1	£56.2	£22.2	£28.9	£13.8	£81.3	£43.1	£11.3	£10.3	£9.7	£20.7	£339.6
Sub-Total Havering Borough	£94.6	£112.2	£34.2	£62.9	£60.5	£92.4	£69.5	£21.6	£22.2	£31.1	£22.1	£623.2
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£9.2	£3.3	£0.0	£0.0	£13.7
Zone 8 Sainsbury's, High Road, Chadwell Heath	£1.5	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£16.1	£1.8	£0.0	£0.0	£19.7
Zone 8 Tesco, High Road, Goodmayes	£0.2	£1.3	£0.0	£0.1	£0.0	£0.2	£1.3	£14.9	£3.3	£0.0	£1.5	£22.8
Zone 8 Other Stores	£0.0	£0.0	£1.4	£0.0	£0.0	£0.2	£0.1	£28.6	£6.6	£0.1	£0.0	£37.0
Aldi, Merriellands Retail Park, Dagenham	£0.0	£0.0	£0.0	£0.3	£2.4	£0.0	£0.0	£0.3	£12.8	£6.2	£0.0	£22.0
Asda, Merriellands Crescent, Dagenham	£1.3	£0.0	£0.8	£0.4	£0.0	£0.0	£0.0	£6.0	£20.5	£3.6	£0.0	£32.5
Lidl, Heathway, Dagenham	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£1.5	£15.2	£0.0	£0.0	£16.9
Morrisons, Wood Lane, Beacontree Heath	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.2	£5.6	£9.6	£0.2	£0.0	£16.4
Zone 9 Other Stores	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£2.8	£22.9	£0.1	£0.0	£26.1
Sainsbury's, William Hunter Way, Brentwood	£0.2	£0.0	£0.0	£0.0	£0.2	£1.8	£0.0	£0.0	£0.0	£0.0	£58.6	£60.7
Zone 11 Other Stores	£0.0	£0.5	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£45.6	£48.5
Other Stores Outside the Study Area	£0.6	£2.4	£2.1	£2.1	£6.6	£2.7	£2.0	£16.5	£12.3	£8.8	£32.5	£88.5
Sub-Total Havering Borough Outside of Centres	£3.8	£4.2	£6.7	£2.9	£9.5	£7.3	£3.8	£101.5	£108.2	£18.9	£138.1	£404.8
Total	£98.4	£116.4	£40.9	£65.8	£70.0	£99.6	£73.3	£123.0	£130.4	£50.0	£160.2	£1,028.0

TABLE B3.8: TOTAL CONVENIENCE (FOOD) SHOPPING SPEND 2028

Excluding Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1 Romford	Zone 2 Hornchurch	Zone 3 Rush Green	Zone 4 Elm Park	Zone 5 Upminster	Zone 6 Harold Hill	Zone 7 Collier Row	Zone 8 Chadwell Heath	Zone 9 Dagenham	Zone 10 Rainham	Zone 11 Brentwood	Total Zones
Available Expenditure 2023 (£m)	£99.9	£117.9	£41.5	£66.3	£70.4	£101.5	£74.3	£122.2	£129.7	£50.8	£158.3	£1,032.9
Asda, Mercury Gardens	£14.9	£2.8	£1.6	£1.0	£0.0	£4.1	£2.4	£1.3	£1.6	£0.1	£1.0	£30.8
Lidl, Atlanta Boulevard	£3.8	£2.7	£1.2	£1.5	£0.2	£0.7	£0.0	£2.5	£0.1	£0.0	£0.0	£12.8
Sainsbury's, The Brewery	£10.2	£0.3	£5.4	£1.1	£0.5	£1.5	£6.0	£3.3	£0.5	£0.0	£0.0	£28.8
Other Romford Town Centre	£5.1	£2.5	£2.4	£0.3	£0.0	£2.2	£2.4	£1.6	£0.6	£0.1	£0.0	£17.2
Sub-Total Romford Metropolitan Centre	£34.0	£8.4	£10.6	£3.9	£0.7	£8.4	£10.8	£8.7	£2.8	£0.1	£1.0	£89.6
Lidl, High Street	£3.3	£17.3	£0.5	£4.9	£2.3	£0.0	£0.0	£1.2	£0.0	£2.3	£0.2	£32.0
Sainsbury's High Street	£6.5	£19.0	£0.0	£11.8	£3.6	£0.9	£0.0	£0.0	£0.2	£1.5	£0.0	£43.7
Other Hornchurch Town Centre	£0.7	£5.5	£0.0	£3.8	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£10.7
Sub-Total Hornchurch District Centre	£10.4	£41.9	£0.6	£20.5	£6.4	£1.1	£0.0	£1.2	£0.2	£3.9	£0.2	£86.4
Co-Op Food, Station Parade, Elm Park	£1.6	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3
Sub-Total Elm Park District Centre	£1.6	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3
Aldi, St Mary's Lane, Upminster	£1.3	£3.0	£0.6	£1.4	£14.7	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£22.5
Marks & Spencer, Station Road, Upminster	£1.0	£3.3	£0.0	£1.7	£7.8	£0.4	£0.0	£0.3	£0.0	£1.1	£0.2	£15.8
Waitrose, St Mary's Lane, Upminster	£1.9	£0.2	£0.1	£0.7	£13.6	£0.8	£0.0	£0.0	£0.2	£0.1	£0.0	£17.6
Other Upminster Town Centre	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9
Sub-Total Upminster District Centre	£4.2	£6.5	£0.7	£3.8	£39.0	£1.2	£0.0	£0.3	£1.6	£1.3	£0.2	£58.8
Shops Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Sub-Total Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Tesco, Collier Row Lane, Collier Row	£2.9	£0.0	£0.3	£0.0	£0.2	£0.4	£15.2	£0.0	£0.2	£0.0	£0.0	£19.4
Other Collier Row Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7
Sub-Total Collier Row District Centre	£2.9	£0.0	£0.3	£0.0	£0.2	£0.4	£15.9	£0.0	£0.2	£0.0	£0.0	£20.1
Tesco Extra, Bridge Road, Rainham	£0.0	£0.0	£0.0	£4.3	£0.6	£0.0	£0.0	£0.0	£6.9	£16.4	£0.0	£28.3
Sub-Total Rainham District Centre	£0.0	£0.0	£0.0	£4.3	£0.6	£0.0	£0.0	£0.0	£6.9	£16.4	£0.0	£28.3
Sub-Total Havering Centres	£53.3	£56.8	£12.2	£34.2	£46.9	£11.3	£26.7	£10.2	£11.8	£21.7	£1.5	£286.6
Zone 1 Other	£11.3	£2.7	£0.4	£0.0	£0.5	£2.2	£1.6	£0.9	£0.0	£0.0	£0.0	£19.6
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	£4.7	£26.1	£9.7	£6.5	£2.0	£1.9	£4.7	£1.1	£4.0	£1.7	£0.0	£62.3
Zone 2 Other	£1.4	£9.7	£0.0	£2.6	£0.5	£0.2	£2.8	£1.7	£0.6	£0.0	£1.5	£21.1
Zone 3 Aldi, Rom Valley Way, Romford	£4.5	£4.6	£2.9	£1.4	£0.5	£0.7	£0.0	£1.9	£3.3	£1.9	£0.0	£21.7
Zone 3 Other	£1.2	£0.8	£4.0	£0.0	£0.0	£0.1	£1.2	£0.5	£1.5	£0.0	£0.0	£9.2
Zone 4 Tesco, Airfield Way, Hornchurch	£2.6	£5.0	£0.2	£13.5	£0.0	£0.2	£0.0	£0.0	£0.4	£1.0	£0.0	£23.1
Zone 4 Other	£0.6	£2.1	£0.0	£2.9	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£5.8
Zone 5 Other	£0.0	£0.4	£0.2	£1.4	£5.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2
Zone 6 Tesco Extra, Bryant Avenue, Romford	£8.3	£3.1	£1.2	£0.5	£4.4	£31.0	£9.2	£0.5	£0.0	£0.1	£11.8	£70.2
Zone 6 Lidl, Gooshays Drive	£0.7	£0.0	£0.5	£0.0	£0.0	£12.8	£0.2	£0.0	£0.0	£0.0	£2.8	£16.9
Zone 6 Other	£1.2	£0.0	£0.5	£0.1	£0.0	£23.5	£0.2	£0.9	£0.0	£0.4	£0.0	£26.8
Zone 7 Aldi, Collier Row Road	£2.9	£0.3	£1.1	£0.1	£0.2	£7.3	£19.4	£1.5	£0.0	£0.5	£0.4	£33.8
Zone 7 Aldi, Marlborough Road	£2.7	£2.0	£1.9	£0.2	£0.0	£2.2	£2.8	£2.2	£0.5	£0.1	£3.9	£18.5
Zone 7 Other	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£1.5	£0.0	£0.0	£0.0	£0.0	£2.4
Zone 10 Out Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£3.9	£0.0	£4.0
Sub-Total Havering Borough Outside of Centres	£42.7	£56.9	£22.6	£29.2	£13.9	£82.8	£43.8	£11.2	£10.3	£9.8	£20.4	£343.6
Sub-Total Havering Borough	£96.0	£113.7	£34.7	£63.4	£60.9	£94.1	£70.5	£21.4	£22.0	£31.6	£21.9	£630.2
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£9.2	£3.2	£0.0	£0.0	£13.6
Zone 8 Sainsbury's, High Road, Chadwell Heath	£1.5	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£16.0	£1.8	£0.0	£0.0	£19.7
Zone 8 Tesco, High Road, Goodmayes	£0.2	£1.3	£0.0	£0.1	£0.0	£0.2	£1.3	£14.8	£3.2	£0.0	£1.4	£22.7
Zone 8 Other Stores	£0.0	£0.0	£1.4	£0.0	£0.0	£0.2	£0.1	£28.4	£6.5	£0.1	£0.0	£36.8
Aldi, Merriellands Retail Park, Dagenham	£0.0	£0.0	£0.0	£0.3	£2.4	£0.0	£0.0	£0.3	£12.7	£6.3	£0.0	£22.0
Asda, Merriellands Crescent, Dagenham	£1.3	£0.0	£0.8	£0.4	£0.0	£0.0	£0.0	£6.0	£20.4	£3.6	£0.0	£32.5
Lidl, Heathway, Dagenham	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£1.5	£15.1	£0.0	£0.0	£16.8
Morrisons, Wood Lane, Beacontree Heath	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.3	£5.6	£9.6	£0.2	£0.0	£16.3
Zone 9 Other Stores	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£2.8	£22.8	£0.1	£0.0	£26.0
Sainsbury's, William Hunter Way, Brentwood	£0.2	£0.0	£0.0	£0.0	£0.2	£1.9	£0.0	£0.0	£0.0	£0.0	£57.9	£60.1
Zone 11 Other Stores	£0.0	£0.5	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£45.1	£48.0
Other Stores Outside the Study Area	£0.6	£2.4	£2.2	£2.1	£6.6	£2.7	£2.0	£16.3	£12.3	£8.9	£32.1	£88.3
Sub-Total Havering Borough Outside of Centres	£3.8	£4.2	£6.8	£3.0	£9.5	£7.4	£3.8	£100.8	£107.7	£19.2	£136.5	£402.7
Total	£99.9	£117.9	£41.5	£66.3	£70.4	£101.5	£74.3	£122.2	£129.7	£50.8	£158.3	£1,032.9

TABLE B3.9: TOTAL CONVENIENCE (FOOD) SHOPPING SPEND 2033

Excluding Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1 Romford	Zone 2 Hornchurch	Zone 3 Rush Green	Zone 4 Elm Park	Zone 5 Upminster	Zone 6 Harold Hill	Zone 7 Collier Row	Zone 8 Chadwell Heath	Zone 9 Dagenham	Zone 10 Rainham	Zone 11 Brentwood	Total Zones
Available Expenditure 2023 (£m)	£102.4	£121.0	£42.6	£68.0	£71.8	£104.3	£75.8	£123.3	£130.8	£52.3	£159.7	£1,052.1
Asda, Mercury Gardens	£15.3	£2.9	£1.6	£1.1	£0.0	£4.2	£2.4	£1.3	£1.6	£0.1	£1.0	£31.6
Lidl, Atlanta Boulevard	£3.9	£2.8	£1.2	£1.5	£0.2	£0.7	£0.0	£2.5	£0.1	£0.0	£0.0	£13.1
Sainsbury's, The Brewery	£10.4	£0.3	£5.6	£1.1	£0.5	£1.6	£6.1	£3.4	£0.5	£0.0	£0.0	£29.5
Other Romford Town Centre	£5.2	£2.6	£2.4	£0.3	£0.0	£2.2	£2.5	£1.6	£0.6	£0.1	£0.0	£17.6
Sub-Total Romford Metropolitan Centre	£34.9	£8.6	£10.9	£4.0	£0.7	£8.7	£11.0	£8.8	£2.8	£0.1	£1.0	£91.7
Lidl, High Street	£3.4	£17.7	£0.5	£5.1	£2.3	£0.0	£0.0	£1.2	£0.0	£2.4	£0.2	£32.8
Sainsbury's High Street	£6.7	£19.5	£0.1	£12.1	£3.7	£0.9	£0.0	£0.0	£0.2	£1.6	£0.0	£44.8
Other Hornchurch Town Centre	£0.7	£5.7	£0.0	£3.9	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£11.0
Sub-Total Hornchurch District Centre	£10.7	£43.0	£0.6	£21.0	£6.5	£1.1	£0.0	£1.2	£0.2	£4.0	£0.2	£88.6
Co-Op Food, Station Parade, Elm Park	£1.7	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Sub-Total Elm Park District Centre	£1.7	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Aldi, St Mary's Lane, Upminster	£1.3	£3.1	£0.6	£1.5	£15.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£22.9
Marks & Spencer, Station Road, Upminster	£1.0	£3.3	£0.0	£1.8	£7.9	£0.4	£0.0	£0.3	£0.0	£1.2	£0.2	£16.1
Waitrose, St Mary's Lane, Upminster	£1.9	£0.2	£0.1	£0.7	£13.9	£0.8	£0.0	£0.0	£0.2	£0.1	£0.0	£18.0
Other Upminster Town Centre	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0
Sub-Total Upminster District Centre	£4.3	£6.7	£0.7	£3.9	£39.8	£1.3	£0.0	£0.3	£1.6	£1.3	£0.2	£60.0
Shops Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Sub-Total Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Tesco, Collier Row Lane, Collier Row	£3.0	£0.0	£0.4	£0.0	£0.2	£0.5	£15.5	£0.0	£0.2	£0.0	£0.0	£19.8
Other Collier Row Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.8
Sub-Total Collier Row District Centre	£3.0	£0.0	£0.4	£0.0	£0.2	£0.5	£16.2	£0.0	£0.2	£0.0	£0.0	£20.5
Tesco Extra, Bridge Road, Rainham	£0.0	£0.0	£0.0	£4.4	£0.6	£0.0	£0.0	£0.0	£6.9	£16.9	£0.0	£28.9
Sub-Total Rainham District Centre	£0.0	£0.0	£0.0	£4.4	£0.6	£0.0	£0.0	£0.0	£6.9	£16.9	£0.0	£28.9
Sub-Total Havering Centres	£54.7	£58.2	£12.5	£35.1	£47.9	£11.6	£27.3	£10.3	£11.9	£22.4	£1.5	£293.3
Zone 1 Other	£11.6	£2.7	£0.5	£0.0	£0.5	£2.3	£1.6	£0.9	£0.0	£0.0	£0.0	£20.1
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	£4.8	£26.8	£9.9	£6.7	£2.0	£1.9	£4.8	£1.1	£4.0	£1.7	£0.0	£63.8
Zone 2 Other	£1.4	£9.9	£0.1	£2.6	£0.6	£0.2	£2.8	£1.8	£0.6	£0.0	£1.5	£21.5
Zone 3 Aldi, Rom Valley Way, Romford	£4.6	£4.7	£2.9	£1.4	£0.5	£0.7	£0.0	£1.9	£3.3	£2.0	£0.0	£22.1
Zone 3 Other	£1.2	£0.8	£4.1	£0.0	£0.0	£0.1	£1.2	£0.5	£1.6	£0.0	£0.0	£9.4
Zone 4 Tesco, Airfield Way, Hornchurch	£2.7	£5.1	£0.2	£13.8	£0.0	£0.2	£0.0	£0.0	£0.4	£1.1	£0.0	£23.7
Zone 4 Other	£0.7	£2.1	£0.0	£2.9	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£6.0
Zone 5 Other	£0.0	£0.4	£0.2	£1.5	£6.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.4
Zone 6 Tesco Extra, Bryant Avenue, Romford	£8.6	£3.2	£1.2	£0.5	£4.5	£31.8	£9.4	£0.5	£0.0	£0.1	£11.9	£71.7
Zone 6 Lidl, Gooshays Drive	£0.7	£0.0	£0.5	£0.0	£0.0	£13.2	£0.2	£0.0	£0.0	£0.0	£2.8	£17.3
Zone 6 Other	£1.3	£0.0	£0.5	£0.1	£0.0	£24.2	£0.2	£0.9	£0.0	£0.4	£0.0	£27.6
Zone 7 Aldi, Collier Row Road	£3.0	£0.3	£1.1	£0.1	£0.2	£7.5	£19.8	£1.6	£0.0	£0.5	£0.4	£34.5
Zone 7 Aldi, Marlborough Road	£2.7	£2.1	£1.9	£0.2	£0.0	£2.3	£2.9	£2.2	£0.5	£0.1	£4.0	£18.9
Zone 7 Other	£0.5	£0.2	£0.1	£0.0	£0.0	£0.1	£1.5	£0.0	£0.0	£0.0	£0.0	£2.5
Zone 10 Out Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.0	£0.0	£4.1
Sub-Total Havering Borough Outside of Centres	£43.8	£58.4	£23.2	£29.9	£14.2	£85.1	£44.6	£11.3	£10.4	£10.1	£20.6	£351.6
Sub-Total Havering Borough	£98.5	£116.6	£35.7	£64.9	£62.1	£96.7	£71.9	£21.6	£22.2	£32.5	£22.1	£644.8
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£9.3	£3.3	£0.0	£0.0	£13.8
Zone 8 Sainsbury's, High Road, Chadwell Heath	£1.6	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£16.1	£1.8	£0.0	£0.0	£19.9
Zone 8 Tesco, High Road, Goodmayes	£0.2	£1.4	£0.0	£0.1	£0.0	£0.2	£1.3	£14.9	£3.3	£0.0	£1.4	£22.9
Zone 8 Other Stores	£0.0	£0.0	£1.4	£0.0	£0.0	£0.2	£0.1	£28.7	£6.6	£0.1	£0.0	£37.2
Aldi, Merriellands Retail Park, Dagenham	£0.0	£0.0	£0.0	£0.3	£2.5	£0.0	£0.0	£0.3	£12.8	£6.5	£0.0	£22.4
Asda, Merriellands Crescent, Dagenham	£1.3	£0.0	£0.8	£0.4	£0.0	£0.0	£0.0	£6.0	£20.6	£3.7	£0.0	£32.9
Lidl, Heathway, Dagenham	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£1.5	£15.3	£0.0	£0.0	£17.0
Morrisons, Wood Lane, Beacontree Heath	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.3	£5.7	£9.7	£0.2	£0.0	£16.5
Zone 9 Other Stores	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£2.8	£23.0	£0.1	£0.0	£26.2
Sainsbury's, William Hunter Way, Brentwood	£0.2	£0.0	£0.0	£0.0	£0.2	£1.9	£0.0	£0.0	£0.0	£0.0	£58.4	£60.6
Zone 11 Other Stores	£0.0	£0.5	£0.0	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£45.5	£48.4
Other Stores Outside the Study Area	£0.7	£2.5	£2.2	£2.2	£6.7	£2.8	£2.1	£16.5	£12.4	£9.2	£32.3	£89.5
Sub-Total Havering Borough Outside of Centres	£3.9	£4.3	£7.0	£3.0	£9.7	£7.6	£3.9	£101.7	£108.6	£19.8	£137.6	£407.2
Total	£102.4	£121.0	£42.6	£68.0	£71.8	£104.3	£75.8	£123.3	£130.8	£52.3	£159.7	£1,052.1

TABLE B3.10: TOTAL CONVENIENCE (FOOD) SHOPPING SPEND 2038

Excluding Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total Zones
Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood		
Available Expenditure 2023 (£m)	£105.3	£124.3	£43.9	£69.8	£73.3	£107.5	£77.5	£125.4	£132.8	£54.0	£161.9	£1,076.0
Asda, Mercury Gardens	£15.7	£3.0	£1.7	£1.1	£0.0	£4.3	£2.5	£1.4	£1.6	£0.1	£1.0	£32.4
Lidl, Atlanta Boulevard	£4.0	£2.9	£1.3	£1.6	£0.3	£0.7	£0.0	£2.6	£0.1	£0.0	£0.0	£13.4
Sainsbury's, The Brewery	£10.7	£0.4	£5.7	£1.2	£0.5	£1.6	£6.3	£3.4	£0.5	£0.0	£0.0	£30.2
Other Romford Town Centre	£5.4	£2.7	£2.5	£0.3	£0.0	£2.3	£2.5	£1.6	£0.7	£0.1	£0.0	£18.0
Sub-Total Romford Metropolitan Centre	£35.9	£8.8	£11.2	£4.1	£0.7	£9.0	£11.3	£9.0	£2.9	£0.2	£1.0	£94.1
Lidl, High Street	£3.5	£18.2	£0.5	£5.2	£2.4	£0.0	£0.0	£1.2	£0.0	£2.4	£0.2	£33.7
Sainsbury's High Street	£6.9	£20.1	£0.1	£12.4	£3.8	£0.9	£0.0	£0.0	£0.3	£1.6	£0.0	£46.0
Other Hornchurch Town Centre	£0.7	£5.9	£0.0	£4.0	£0.5	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£11.3
Sub-Total Hornchurch District Centre	£11.0	£44.2	£0.6	£21.6	£6.7	£1.1	£0.0	£1.2	£0.3	£4.1	£0.2	£91.0
Co-Op Food, Station Parade, Elm Park	£1.7	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Sub-Total Elm Park District Centre	£1.7	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Aldi, St Mary's Lane, Upminster	£1.4	£3.2	£0.6	£1.5	£15.3	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£23.5
Marks & Spencer, Station Road, Upminster	£1.1	£3.4	£0.0	£1.8	£8.1	£0.4	£0.0	£0.3	£0.0	£1.2	£0.2	£16.5
Waitrose, St Mary's Lane, Upminster	£2.0	£0.2	£0.1	£0.7	£14.2	£0.9	£0.0	£0.0	£0.2	£0.1	£0.0	£18.4
Other Upminster Town Centre	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0
Sub-Total Upminster District Centre	£4.4	£6.8	£0.7	£4.0	£40.6	£1.3	£0.0	£0.3	£1.6	£1.3	£0.2	£61.4
Shops Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Sub-Total Harold Hill District Centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Tesco, Collier Row Lane, Collier Row	£3.1	£0.0	£0.4	£0.0	£0.2	£0.5	£15.8	£0.0	£0.3	£0.0	£0.0	£20.2
Other Collier Row Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.8
Sub-Total Collier Row District Centre	£3.1	£0.0	£0.4	£0.0	£0.2	£0.5	£16.6	£0.0	£0.3	£0.0	£0.0	£21.0
Tesco Extra, Bridge Road, Rainham	£0.0	£0.0	£0.0	£4.6	£0.7	£0.0	£0.0	£0.0	£7.0	£17.5	£0.0	£29.7
Sub-Total Rainham District Centre	£0.0	£0.0	£0.0	£4.6	£0.7	£0.0	£0.0	£0.0	£7.0	£17.5	£0.0	£29.7
Sub-Total Havering Centres	£56.3	£59.9	£12.8	£36.0	£48.9	£12.0	£27.9	£10.5	£12.0	£23.1	£1.5	£300.9
Zone 1 Other	£11.9	£2.8	£0.5	£0.0	£0.5	£2.3	£1.7	£0.9	£0.0	£0.0	£0.0	£20.7
Zone 2 Tesco Extra, Hornchurch Road, Hornchurch	£4.9	£27.5	£10.2	£6.8	£2.1	£2.0	£4.9	£1.1	£4.1	£1.8	£0.0	£65.5
Zone 2 Other	£1.5	£10.2	£0.1	£2.7	£0.6	£0.2	£2.9	£1.8	£0.6	£0.0	£1.5	£22.1
Zone 3 Aldi, Rom Valley Way, Romford	£4.8	£4.8	£3.0	£1.5	£0.5	£0.8	£0.0	£2.0	£3.3	£2.1	£0.0	£22.7
Zone 3 Other	£1.2	£0.8	£4.2	£0.0	£0.0	£0.1	£1.2	£0.5	£1.6	£0.0	£0.0	£9.6
Zone 4 Tesco, Airfield Way, Hornchurch	£2.8	£5.2	£0.2	£14.2	£0.0	£0.3	£0.2	£0.0	£0.4	£1.1	£0.0	£24.3
Zone 4 Other	£0.7	£2.2	£0.0	£3.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£6.1
Zone 5 Other	£0.0	£0.4	£0.3	£1.5	£6.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.6
Zone 6 Tesco Extra, Bryant Avenue, Romford	£8.8	£3.3	£1.3	£0.6	£4.6	£32.8	£9.6	£0.5	£0.0	£0.1	£12.1	£73.6
Zone 6 Lidl, Gooshays Drive	£0.8	£0.0	£0.5	£0.0	£0.0	£13.6	£0.2	£0.0	£0.0	£0.0	£2.8	£17.8
Zone 6 Other	£1.3	£0.0	£0.5	£0.1	£0.0	£24.9	£0.3	£0.9	£0.0	£0.5	£0.0	£28.4
Zone 7 Aldi, Collier Row Road	£3.1	£0.3	£1.2	£0.2	£0.2	£7.7	£20.2	£1.6	£0.0	£0.6	£0.4	£35.4
Zone 7 Aldi, Marlborough Road	£2.8	£2.1	£2.0	£0.2	£0.0	£2.4	£2.9	£2.2	£0.5	£0.1	£4.0	£19.3
Zone 7 Other	£0.5	£0.2	£0.1	£0.0	£0.0	£0.1	£1.6	£0.0	£0.0	£0.0	£0.0	£2.5
Zone 10 Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.2	£0.0	£4.3
Sub-Total Havering Borough Outside of Centres	£45.0	£60.0	£23.9	£30.7	£14.5	£87.7	£45.6	£11.5	£10.5	£10.5	£20.9	£360.9
Sub-Total Havering Borough	£101.3	£119.9	£36.7	£66.7	£63.4	£99.7	£73.5	£22.0	£22.6	£33.6	£22.4	£661.7
Zone 8 Asda, Whalebone Lane South, Chadwell Heath	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£9.4	£3.3	£0.0	£0.0	£14.0
Zone 8 Sainsbury's, High Road, Chadwell Heath	£1.6	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£16.4	£1.9	£0.0	£0.0	£20.2
Zone 8 Tesco, High Road, Goodmayes	£0.2	£1.4	£0.0	£0.2	£0.0	£0.3	£1.3	£15.2	£3.3	£0.0	£1.5	£23.3
Zone 8 Other Stores	£0.0	£0.0	£1.5	£0.0	£0.0	£0.3	£0.1	£29.2	£6.7	£0.1	£0.0	£37.8
Aldi, Merriellands Retail Park, Dagenham	£0.0	£0.0	£0.0	£0.3	£2.5	£0.0	£0.0	£0.3	£13.0	£6.7	£0.0	£22.9
Asda, Merriellands Crescent, Dagenham	£1.4	£0.0	£0.8	£0.4	£0.0	£0.0	£0.0	£6.1	£20.9	£3.9	£0.0	£33.5
Lidl, Heathway, Dagenham	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£1.5	£15.5	£0.0	£0.0	£17.2
Morrisons, Wood Lane, Beacontree Heath	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.3	£5.7	£9.8	£0.2	£0.0	£16.7
Zone 9 Other Stores	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£2.8	£23.3	£0.1	£0.0	£26.6
Sainsbury's, William Hunter Way, Brentwood	£0.2	£0.0	£0.0	£0.0	£0.2	£2.0	£0.0	£0.0	£0.0	£0.0	£59.2	£61.5
Zone 11 Other Stores	£0.0	£0.5	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0	£0.0	£46.1	£49.2
Other Stores Outside the Study Area	£0.7	£2.6	£2.3	£2.2	£6.9	£2.9	£2.1	£16.8	£12.6	£9.5	£32.8	£91.2
Sub-Total Havering Borough Outside of Centres	£4.0	£4.5	£7.2	£3.1	£9.9	£7.9	£4.0	£103.4	£110.3	£20.4	£139.5	£414.2
Total	£105.3	£124.3	£43.9	£69.8	£73.3	£107.5	£77.5	£125.4	£132.8	£54.0	£161.9	£1,076.0

APPENDIX B4: MARKET SHARE ANALYSIS: COMPARISON GOODS

Excluding Internet Shopping and other Special Forms of Trading

[illegible]

TABLE B4.2: COMPARISON SHOPPING - CLOTHING 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	25.9%	30.3%	29.3%	36.2%	21.8%	9.1%	40.6%	49.2%	31.3%	30.8%	5.1%	4.5%
Collier Row District Centre	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	1.1%	0.5%	5.5%	0.0%	3.7%	0.0%	0.0%	0.4%	0.0%	0.0%	2.6%	0.0%
Rainham District Centre	0.2%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.4%	0.0%	0.0%	1.9%	0.0%
Upminster District Centre	1.0%	3.5%	0.0%	0.0%	0.5%	9.4%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Sub-Total Havering Main Centres	28.5%	34.7%	34.9%	36.2%	26.5%	18.5%	42.0%	50.0%	31.3%	30.8%	10.1%	4.5%
Elsewhere in Havering	2.5%	5.7%	2.1%	0.5%	0.0%	1.1%	8.8%	3.4%	0.0%	0.4%	0.0%	2.4%
Sub-Total Havering Borough	30.9%	40.4%	37.0%	36.6%	26.5%	19.6%	50.8%	53.5%	31.3%	31.2%	10.1%	6.9%
Outside of Havering												
Elsewhere in Study Area	4.7%	0.5%	0.0%	3.5%	0.0%	0.6%	0.5%	0.0%	1.9%	12.2%	0.0%	18.5%
Lakeside	19.6%	11.4%	20.9%	6.1%	33.1%	39.7%	16.6%	6.7%	14.8%	15.4%	50.2%	16.9%
Elsewhere outside of Study Area	9.5%	8.0%	5.3%	4.8%	1.1%	7.2%	7.7%	5.1%	26.5%	7.4%	0.9%	16.6%
Sub-Total Outside of Havering	33.8%	19.8%	26.2%	14.4%	34.2%	47.4%	24.7%	11.8%	43.2%	35.0%	51.1%	52.0%
Online / internet / home delivery	35.3%	39.8%	36.8%	49.0%	39.3%	32.9%	24.5%	34.7%	25.6%	33.8%	38.8%	41.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.3 COMPARISON SHOPPING - RECORDED MEDIA 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	13.4%	7.5%	5.0%	4.4%	4.0%	11.1%	13.9%	11.8%	5.8%	0.9%	3.1%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rainham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	3.6%
Upminster District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	13.4%	7.5%	5.0%	5.2%	4.0%	11.1%	14.7%	11.8%	5.8%	1.9%	6.7%
Elsewhere in Havering	0.0%	0.6%	3.9%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Borough	13.4%	8.2%	8.9%	5.2%	4.0%	11.1%	18.6%	11.8%	5.8%	1.9%	6.7%
Elsewhere in Study Area	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	11.3%	5.0%	0.0%	9.7%
Lakeside	0.0%	3.7%	3.9%	9.3%	10.6%	1.0%	0.0%	0.0%	2.2%	12.0%	6.1%
Elsewhere outside of Study Area	5.8%	3.7%	0.0%	0.9%	2.7%	1.0%	3.9%	8.6%	4.8%	0.0%	0.8%
Sub-Total Outside of Havering	5.8%	7.3%	8.8%	10.2%	13.3%	1.9%	3.9%	19.9%	12.0%	12.0%	16.5%
Online / internet / home delivery	80.8%	84.5%	82.4%	84.6%	82.7%	87.0%	77.5%	68.3%	82.3%	86.2%	76.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.4:COMPARISON SHOPPING - AUDIO VISUAL 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	6.4%	10.9%	9.0%	9.5%	4.9%	0.0%	9.3%	6.9%	6.9%	4.9%	3.4%	3.2%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	1.0%	0.5%	2.3%	0.5%	3.8%	2.6%	0.6%	0.6%	0.0%	0.5%	0.0%	0.0%
Rainham District Centre	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	3.2%
Upminster District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	8.0%	11.4%	11.3%	10.1%	8.6%	2.6%	10.4%	7.4%	6.9%	5.4%	6.9%	6.4%
Elsewhere in Havering	18.0%	15.7%	28.3%	23.5%	13.0%	22.9%	35.3%	36.1%	10.7%	2.3%	4.0%	10.1%
Sub-Total Havering Borough	26.1%	27.2%	39.6%	33.5%	21.6%	25.5%	45.7%	43.5%	17.6%	7.7%	10.9%	16.4%
Havering												
Elsewhere in Study Area	4.9%	0.0%	0.0%	4.6%	0.0%	0.0%	0.6%	1.7%	20.1%	13.4%	7.8%	4.1%
Lakeside	10.6%	7.9%	11.2%	5.1%	19.9%	26.3%	1.2%	1.1%	3.0%	9.2%	39.9%	8.7%
Elsewhere outside of Study Area	7.3%	4.7%	2.6%	7.4%	5.5%	4.6%	6.3%	3.8%	16.6%	13.3%	0.6%	9.5%
Sub-Total Outside of Havering	22.9%	12.6%	13.8%	17.1%	25.4%	30.9%	8.1%	6.6%	39.6%	35.9%	48.3%	22.3%
Online / internet / home delivery	51.0%	60.3%	46.6%	49.4%	53.0%	43.6%	46.2%	49.9%	42.8%	56.5%	40.9%	61.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.5: COMPARISON SHOPPING - DOMESTIC APPLIANCES 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	7.0%	3.7%	0.5%	0.5%	0.6%	4.9%	1.4%	4.8%	3.4%	2.4%	0.0%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	5.1%	7.4%	4.7%	21.2%	11.6%	2.8%	0.5%	0.5%	0.9%	2.0%	0.0%
Rainham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	12.7%	0.0%
Upminster District Centre	0.0%	0.9%	0.5%	2.2%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	12.1%	13.0%	5.7%	24.0%	18.8%	7.7%	1.9%	5.3%	5.1%	17.1%	0.0%
Elsewhere in Havering	22.0%	33.0%	31.2%	18.7%	13.5%	49.9%	42.9%	6.3%	5.5%	2.5%	2.2%
Sub-Total Havering Borough	34.2%	46.0%	37.0%	42.7%	32.3%	57.6%	44.8%	11.6%	10.6%	19.6%	2.2%
Havering											
Elsewhere in Study Area	0.0%	0.0%	6.3%	3.6%	1.2%	1.5%	1.9%	29.6%	23.1%	3.0%	14.5%
Lakeside	4.1%	9.0%	4.7%	10.9%	18.2%	2.9%	0.9%	2.3%	3.4%	34.3%	5.5%
Elsewhere outside of Study Area	3.2%	2.7%	1.5%	7.3%	4.1%	6.4%	4.1%	7.6%	15.0%	0.5%	14.8%
Sub-Total Outside of Havering	7.3%	11.6%	12.4%	21.8%	23.5%	10.8%	6.8%	39.5%	41.5%	37.8%	34.8%
Online / internet / home delivery	58.5%	42.4%	50.6%	35.5%	44.2%	31.6%	48.4%	48.9%	47.9%	42.6%	63.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.6: COMPARISON SHOPPING - BOOKS & STATIONARY 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	35.6%	23.1%	34.5%	17.7%	12.8%	28.7%	23.8%	17.3%	20.9%	6.1%	0.6%
Collier Row District Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.6%
Elm Park District Centre	0.0%	1.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.0%	7.5%	0.0%	12.4%	0.0%	0.6%	0.0%	0.0%	0.0%	3.2%	0.0%
Rainham District Centre	0.0%	0.0%	2.5%	0.7%	3.0%	0.0%	0.5%	0.0%	4.2%	23.3%	2.7%
Upminster District Centre	0.0%	3.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Sub-Total Havering Main Centres	36.1%	34.6%	37.0%	31.5%	22.2%	35.6%	25.3%	17.3%	25.1%	33.2%	3.9%
Elsewhere in Havering	7.9%	5.0%	6.9%	10.8%	3.2%	12.1%	7.8%	0.0%	1.2%	2.9%	0.0%
Sub-Total Havering Borough	43.9%	39.6%	44.0%	42.2%	25.4%	47.7%	33.1%	17.3%	26.3%	36.1%	3.9%
Havering											
Elsewhere in Study Area	1.6%	0.0%	4.0%	3.2%	1.3%	5.2%	0.0%	13.9%	23.7%	2.8%	31.8%
Lakeside	0.5%	3.4%	2.4%	8.3%	20.2%	2.9%	0.0%	0.0%	4.0%	18.4%	0.0%
Elsewhere outside of Study Area	3.6%	0.0%	2.4%	4.4%	5.7%	1.7%	5.3%	11.9%	6.4%	1.1%	2.3%
Sub-Total Outside of Havering	5.7%	3.4%	8.8%	15.9%	27.2%	9.9%	5.3%	25.8%	34.1%	22.4%	34.1%
Online / internet / home delivery	50.3%	57.0%	47.3%	41.9%	47.4%	42.5%	61.6%	57.0%	39.6%	41.6%	62.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.7: COMPARISON SHOPPING - GAMES, SPORTS, BIKES, PETS & PET PRODUCTS, CAMPING ETC 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	16.7%	14.4%	23.7%	15.1%	6.0%	23.8%	18.5%	19.1%	12.1%	2.3%	0.0%
Collier Row District Centre	0.0%	1.0%	0.6%	0.0%	0.0%	0.0%	1.8%	0.0%	0.6%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.0%	0.7%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.6%	1.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rainham District Centre	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	3.5%	10.6%	0.0%
Upminster District Centre	0.0%	0.0%	1.2%	0.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	17.3%	16.4%	25.6%	21.6%	16.8%	24.4%	20.9%	19.1%	16.2%	12.9%	0.0%
Elsewhere in Havering	14.7%	24.8%	27.8%	23.5%	10.9%	27.0%	8.3%	3.4%	3.5%	6.1%	6.5%
Sub-Total Havering Borough	32.0%	41.2%	53.4%	45.0%	27.7%	51.5%	29.2%	22.5%	19.6%	18.9%	6.5%
Havering											
Elsewhere in Study Area	0.0%	0.0%	1.2%	0.7%	0.0%	3.1%	0.0%	8.7%	13.3%	7.7%	15.9%
Lakeside	0.0%	12.4%	10.7%	8.7%	27.0%	8.3%	4.7%	0.0%	15.2%	30.4%	2.5%
Elsewhere outside of Study Area	0.0%	0.5%	3.5%	4.9%	3.1%	3.2%	2.8%	22.3%	9.6%	0.6%	11.6%
Sub-Total Outside of Havering	0.0%	12.9%	15.5%	14.2%	30.2%	14.6%	7.6%	31.0%	38.1%	38.7%	30.0%
Online / internet / home delivery	68.0%	45.9%	31.1%	40.7%	42.1%	33.9%	63.3%	46.5%	42.3%	42.3%	63.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.8: COMPARISON SHOPPING - FURNITURE, FLOORINGS & CARPETS, HOUSEHOLD TEXTILES AND FURNISHINGS 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	5.8%	3.5%	8.9%	6.5%	3.8%	6.0%	2.6%	11.7%	4.3%	1.2%	4.3%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.6%	0.0%	2.5%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.6%	0.0%	0.0%	1.2%	0.0%
Hornchurch District Centre	1.7%	1.8%	3.2%	3.2%	0.6%	0.6%	0.0%	0.0%	0.0%	2.5%	0.7%
Rainham District Centre	0.0%	0.0%	0.6%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	3.5%
Upminster District Centre	8.6%	2.4%	3.8%	5.6%	49.2%	5.0%	4.4%	2.1%	0.5%	4.3%	3.0%
Sub-Total Havering Main Centres	16.2%	8.3%	16.4%	19.1%	54.8%	16.6%	7.7%	13.8%	4.8%	10.5%	11.5%
Elsewhere in Havering	28.0%	42.0%	22.3%	23.8%	16.0%	52.9%	35.9%	15.0%	16.1%	10.2%	5.2%
Sub-Total Havering Borough	44.2%	50.4%	38.7%	42.8%	70.9%	69.5%	43.6%	28.8%	20.8%	20.7%	16.7%
Elsewhere in Study Area	0.0%	0.0%	0.6%	0.0%	0.0%	4.2%	0.0%	8.1%	11.7%	3.5%	12.6%
Lakeside	21.6%	29.2%	19.0%	24.8%	19.3%	8.6%	5.7%	13.0%	15.2%	53.8%	17.4%
Elsewhere outside of Study Area	1.2%	0.6%	5.0%	1.2%	1.3%	5.0%	2.6%	12.7%	12.8%	3.7%	8.7%
Sub-Total Outside of Havering	22.8%	29.8%	24.6%	26.0%	20.6%	17.7%	8.3%	33.8%	39.7%	60.9%	38.7%
Online / internet / home delivery	33.0%	19.9%	36.7%	31.1%	8.6%	12.8%	48.1%	37.4%	39.5%	18.4%	44.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.9: COMPARISON SHOPPING - DIY AND GARDENING PRODUCTS 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	6.6%	3.2%	0.0%	0.6%	0.6%	3.3%	2.9%	4.2%	2.9%	0.0%	0.0%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rainham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Upminster District Centre	0.5%	0.0%	0.0%	0.0%	3.6%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	7.6%	3.7%	0.5%	0.6%	4.3%	4.4%	4.9%	4.2%	2.9%	1.2%	0.0%
Elsewhere in Havering	75.5%	76.5%	82.9%	81.6%	69.4%	76.9%	69.5%	40.6%	31.1%	33.8%	38.7%
Sub-Total Havering Borough	83.1%	80.1%	83.4%	82.2%	73.7%	81.4%	74.5%	44.8%	34.0%	35.0%	38.7%
Havering											
Elsewhere in Study Area	0.5%	0.0%	2.0%	0.6%	1.3%	2.3%	4.0%	19.8%	32.5%	0.0%	32.5%
Lakeside	0.5%	1.9%	0.0%	2.9%	17.8%	0.6%	0.0%	0.0%	3.3%	45.5%	0.0%
Elsewhere outside of Study Area	0.5%	2.2%	3.0%	4.7%	1.9%	4.0%	4.4%	19.5%	12.6%	2.3%	19.0%
Sub-Total Outside of Havering	1.5%	4.1%	5.0%	8.2%	21.0%	6.8%	8.4%	39.2%	48.4%	47.8%	51.5%
Online / internet / home delivery	15.4%	15.7%	11.6%	9.6%	5.4%	11.8%	17.1%	16.0%	17.6%	17.2%	9.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.10: COMPARISON SHOPPING - PERSONAL GOODS & APPLIANCES, COSMETICS ETC 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	45.9%	14.1%	25.8%	8.5%	7.1%	20.4%	19.9%	19.7%	13.8%	4.3%	2.5%
Collier Row District Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%	31.4%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	0.0%	4.0%	0.0%	9.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.5%	17.1%	1.4%	22.5%	3.0%	1.0%	0.0%	0.0%	0.4%	4.4%	0.0%
Rainham District Centre	0.0%	0.0%	2.4%	7.9%	1.2%	0.0%	0.0%	0.0%	0.8%	28.2%	0.0%
Upminster District Centre	0.0%	0.5%	2.2%	0.6%	31.3%	0.5%	2.3%	0.0%	0.0%	0.0%	0.5%
Sub-Total Havering Main Centres	46.8%	35.7%	31.8%	48.5%	42.5%	23.3%	53.9%	19.7%	14.9%	37.5%	3.1%
Elsewhere in Havering	10.7%	11.7%	19.2%	19.8%	7.8%	40.2%	18.2%	10.6%	2.9%	3.5%	3.7%
Sub-Total Havering Borough	57.5%	47.4%	51.1%	68.4%	50.3%	63.5%	72.1%	30.3%	17.9%	41.0%	6.7%
Havering											
Elsewhere in Study Area	0.5%	0.0%	2.8%	0.6%	0.6%	3.8%	0.9%	26.4%	32.8%	3.3%	41.2%
Lakeside	0.9%	8.9%	2.7%	6.2%	13.0%	3.3%	0.0%	3.5%	5.2%	28.9%	1.1%
Elsewhere outside of Study Area	3.1%	2.6%	5.7%	8.3%	3.0%	2.4%	1.4%	14.4%	7.4%	1.5%	7.0%
Sub-Total Outside of Havering	4.4%	11.5%	11.3%	15.1%	16.7%	9.5%	2.3%	44.3%	45.4%	33.7%	49.3%
Online / internet / home delivery	38.1%	41.1%	37.7%	16.5%	33.0%	27.0%	25.6%	25.4%	36.7%	25.3%	44.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.11: COMPARISON SHOPPING - MEDICAL GOODS AND THERAPUTIC APPLIANCES ETC 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Total Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
		Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	14.1%	51.2%	9.5%	38.8%	5.1%	1.2%	14.6%	14.5%	13.4%	13.2%	3.4%	0.0%
Collier Row District Centre	4.9%	4.6%	0.0%	0.0%	0.0%	0.0%	1.0%	53.9%	0.0%	0.0%	0.0%	0.0%
Elm Park District Centre	1.6%	0.0%	5.1%	0.0%	13.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Harold Hill District Centre	1.8%	0.0%	0.5%	0.0%	0.0%	0.0%	16.6%	0.4%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	7.5%	2.6%	36.4%	1.0%	33.3%	1.7%	2.0%	0.0%	0.0%	0.5%	3.0%	0.0%
Rainham District Centre	3.5%	0.0%	0.0%	0.0%	4.0%	1.2%	0.0%	0.4%	0.0%	3.6%	53.3%	0.0%
Upminster District Centre	5.2%	3.2%	0.5%	2.9%	0.6%	60.8%	0.0%	2.2%	0.0%	0.0%	1.0%	0.0%
Sub-Total Havering Main Centres	38.5%	61.5%	52.0%	42.8%	56.4%	65.5%	34.2%	71.4%	13.4%	17.3%	61.3%	0.0%
Elsewhere in Havering	16.8%	22.3%	26.1%	39.4%	18.4%	19.8%	50.4%	13.5%	2.4%	0.9%	8.1%	0.0%
Sub-Total Havering Borough	55.3%	83.9%	78.1%	82.2%	74.8%	85.3%	84.5%	85.0%	15.8%	18.2%	69.5%	0.0%
Havering												
Elsewhere in Study Area	24.5%	2.6%	0.0%	8.8%	1.2%	0.6%	2.9%	1.3%	48.5%	62.7%	3.6%	75.6%
Lakeside	1.6%	0.9%	3.1%	0.0%	5.8%	1.2%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%
Elsewhere outside of Study Area	3.7%	0.0%	2.2%	0.5%	0.0%	1.7%	0.5%	2.7%	13.8%	2.2%	0.0%	9.4%
Sub-Total Outside of Havering	29.8%	3.6%	5.3%	9.3%	6.9%	3.5%	3.4%	4.0%	62.3%	64.9%	16.2%	85.0%
Online / internet / home delivery	14.9%	12.6%	16.6%	8.5%	18.3%	11.2%	12.1%	11.0%	21.9%	16.9%	14.4%	15.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.12: COMPARISON SHOPPING - OTHER GOODS (INC JEWELLERY, WATCHES, GLASSWARE, CHINA, TABLEWARE & KITCHEN UTENSILS ETC) 2023 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood
Romford Metropolitan Centre	19.3%	14.9%	30.8%	14.1%	6.8%	22.8%	15.0%	15.6%	11.4%	0.8%	0.0%
Collier Row District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Elm Park District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harold Hill District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hornchurch District Centre	0.7%	5.0%	0.0%	5.8%	1.0%	0.8%	0.0%	0.0%	0.0%	1.6%	0.0%
Rainham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%
Upminster District Centre	0.0%	2.2%	0.0%	1.7%	23.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Havering Main Centres	20.0%	22.0%	30.8%	21.6%	30.9%	23.6%	15.0%	15.6%	12.0%	9.9%	0.0%
Elsewhere in Havering	9.0%	1.4%	8.3%	0.8%	0.0%	19.1%	5.3%	4.3%	3.9%	1.7%	5.3%
Sub-Total Havering Borough	29.0%	23.5%	39.0%	22.4%	30.9%	42.7%	20.3%	19.8%	15.9%	11.5%	5.3%
Havering											
Elsewhere in Study Area	0.0%	3.4%	0.6%	0.0%	1.0%	1.6%	0.0%	2.2%	6.3%	0.0%	20.6%
Lakeside	22.7%	23.9%	21.9%	20.0%	38.5%	20.0%	12.7%	0.8%	14.8%	57.4%	10.8%
Elsewhere outside of Study Area	15.8%	6.2%	11.9%	6.4%	7.7%	4.8%	5.1%	28.3%	9.6%	2.5%	19.5%
Sub-Total Outside of Havering	38.5%	33.5%	34.4%	26.4%	47.2%	26.4%	17.8%	31.3%	30.7%	59.8%	50.9%
Online / internet / home delivery	32.5%	43.0%	26.5%	51.2%	21.9%	30.8%	61.9%	48.9%	53.4%	28.6%	43.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE B4.13: COMPARISON SHOPPING - TOTAL COMPARISON SPEND 2023 (£m)*Excluding Internet Shopping and other Special Forms of Trading*

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood	
Available Spend 2023	£113.3	£136.7	£43.9	£74.5	£81.7	£106.3	£83.0	£124.9	£130.5	£55.8	£192.4	£1,143.0
Romford Metropolitan Centre	£43.8	£32.3	£17.3	£14.0	£6.5	£31.6	£30.2	£34.2	£31.6	£2.7	£6.4	£250.5
Collier Row District Centre	£1.0	£0.3	£0.0	£0.0	£0.0	£0.2	£7.8	£0.0	£0.2	£0.0	£0.1	£9.7
Elm Park District Centre	£0.0	£1.8	£0.0	£2.3	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.2
Harold Hill District Centre	£0.0	£0.1	£0.0	£0.0	£0.0	£4.6	£0.4	£0.0	£0.0	£0.1	£0.0	£5.2
Hornchurch District Centre	£3.2	£15.8	£0.9	£10.8	£2.6	£1.1	£0.2	£0.1	£0.4	£1.6	£0.4	£37.1
Rainham District Centre	£0.0	£0.0	£0.2	£1.3	£0.4	£0.0	£0.2	£0.0	£2.4	£9.5	£3.1	£16.9
Upminster District Centre	£4.6	£1.8	£0.7	£1.6	£21.5	£0.9	£1.4	£0.6	£0.2	£0.7	£1.6	£35.6
Sub-Total Havering Main Centres	£52.6	£52.1	£19.1	£30.0	£32.0	£38.4	£40.3	£34.9	£34.7	£14.6	£11.7	£360.3
Elsewhere in Havering	£36.2	£45.7	£13.6	£18.1	£14.3	£45.4	£29.2	£11.9	£11.4	£4.5	£18.5	£248.8
Sub-Total Havering Borough	£88.8	£97.8	£32.7	£48.1	£46.3	£83.8	£69.5	£46.8	£46.1	£19.1	£30.2	£609.1
Outside of Havering												
Elsewhere in Study Area	£0.9	£0.5	£2.7	£1.0	£0.7	£3.1	£0.8	£30.3	£42.6	£2.2	£84.8	£169.6
Lakeside	£15.5	£32.0	£5.7	£21.8	£29.5	£12.5	£6.7	£12.1	£22.2	£33.4	£30.7	£222.0
Elsewhere outside of Study Area	£8.2	£6.4	£2.8	£3.7	£5.2	£7.0	£6.0	£35.8	£19.6	£1.0	£46.7	£142.3
Sub-Total Outside of Havering	£24.5	£38.9	£11.2	£26.4	£35.4	£22.6	£13.5	£78.1	£84.4	£36.7	£162.2	£534.0
Total	£113.3	£136.7	£43.9	£74.5	£81.7	£106.3	£83.0	£124.9	£130.5	£55.8	£192.4	£1,143.0

TABLE B4.14: COMPARISON SHOPPING - TOTAL COMPARISON SPEND 2028 (£m)*Excluding Internet Shopping and other Special Forms of Trading*

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood	
Available Spend 2028	£123.4	£148.6	£47.8	£80.5	£88.1	£116.2	£90.4	£133.2	£139.3	£60.8	£204.0	£1,232.3
Romford Metropolitan Centre	£47.7	£35.1	£18.8	£15.2	£7.0	£34.5	£32.8	£36.4	£33.7	£2.9	£6.8	£271.0
Collier Row District Centre	£1.1	£0.3	£0.1	£0.0	£0.0	£0.2	£8.5	£0.0	£0.2	£0.0	£0.1	£10.6
Elm Park District Centre	£0.0	£1.9	£0.0	£2.5	£1.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£5.6
Harold Hill District Centre	£0.0	£0.1	£0.0	£0.0	£0.0	£5.0	£0.5	£0.0	£0.0	£0.1	£0.0	£5.7
Hornchurch District Centre	£3.5	£17.2	£0.9	£11.6	£2.8	£1.2	£0.3	£0.1	£0.4	£1.8	£0.4	£40.2
Rainham District Centre	£0.0	£0.0	£0.2	£1.4	£0.4	£0.0	£0.3	£0.0	£2.5	£10.3	£3.3	£18.3
Upminster District Centre	£5.0	£1.9	£0.8	£1.8	£23.1	£1.0	£1.6	£0.7	£0.2	£0.7	£1.7	£38.4
Sub-Total Havering Main Centres	£57.2	£56.6	£20.8	£32.4	£34.5	£41.9	£43.9	£37.2	£37.1	£15.9	£12.4	£390.0
Elsewhere in Havering	£39.5	£49.7	£14.8	£19.6	£15.5	£49.6	£31.8	£12.6	£12.2	£4.9	£19.6	£269.7
Sub-Total Havering Borough	£96.7	£106.3	£35.6	£52.0	£50.0	£91.5	£75.7	£49.9	£49.2	£20.8	£32.0	£659.6
Outside of Havering												
Elsewhere in Study Area	£0.9	£0.5	£3.0	£1.0	£0.8	£3.4	£0.9	£32.3	£45.4	£2.4	£89.9	£180.6
Lakeside	£16.9	£34.8	£6.2	£23.5	£31.8	£13.7	£7.3	£12.8	£23.7	£36.5	£32.5	£239.7
Elsewhere outside of Study Area	£8.9	£6.9	£3.1	£3.9	£5.6	£7.6	£6.5	£38.2	£21.0	£1.1	£49.6	£152.3
Sub-Total Outside of Havering	£26.7	£42.3	£12.3	£28.5	£38.2	£24.7	£14.7	£83.3	£90.1	£40.0	£172.0	£572.7
Total	£123.4	£148.6	£47.8	£80.5	£88.1	£116.2	£90.3	£133.2	£139.3	£60.8	£204.0	£1,232.3

TABLE B4.15: COMPARISON SHOPPING - TOTAL COMPARISON SPEND 2033 (£m)*Excluding Internet Shopping and other Special Forms of Trading*

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood	
Available Spend 2033	£143.9	£173.3	£55.8	£93.8	£102.2	£135.8	£104.8	£152.8	£159.7	£71.2	£233.9	£1,427.2
Romford Metropolitan Centre	£55.6	£41.0	£21.9	£17.7	£8.1	£40.3	£38.1	£41.8	£38.7	£3.4	£7.8	£314.4
Collier Row District Centre	£1.3	£0.4	£0.1	£0.0	£0.0	£0.3	£9.8	£0.0	£0.3	£0.0	£0.1	£12.3
Elm Park District Centre	£0.0	£2.2	£0.0	£2.9	£1.4	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£6.5
Harold Hill District Centre	£0.0	£0.1	£0.0	£0.0	£0.0	£5.9	£0.5	£0.0	£0.0	£0.2	£0.0	£6.7
Hornchurch District Centre	£4.1	£20.1	£1.1	£13.6	£3.3	£1.4	£0.3	£0.2	£0.4	£2.1	£0.5	£46.9
Rainham District Centre	£0.0	£0.0	£0.2	£1.6	£0.5	£0.0	£0.3	£0.0	£2.9	£12.1	£3.7	£21.3
Upminster District Centre	£5.8	£2.2	£0.9	£2.0	£26.8	£1.2	£1.8	£0.8	£0.2	£0.9	£2.0	£44.6
Sub-Total Havering Main Centres	£66.7	£66.0	£24.3	£37.8	£40.0	£49.0	£50.8	£42.7	£42.5	£18.6	£14.2	£452.8
Elsewhere in Havering	£46.0	£57.9	£17.3	£22.8	£17.9	£58.0	£36.9	£14.5	£14.0	£5.8	£22.5	£313.4
Sub-Total Havering Borough	£112.8	£123.9	£41.5	£60.6	£58.0	£107.0	£87.7	£57.2	£56.4	£24.4	£36.6	£766.2
Outside of Havering												
Elsewhere in Study Area	£1.1	£0.6	£3.5	£1.2	£0.9	£3.9	£1.0	£37.0	£52.1	£2.9	£103.1	£207.4
Lakeside	£19.7	£40.6	£7.3	£27.4	£36.9	£16.0	£8.5	£14.7	£27.2	£42.7	£37.3	£278.2
Elsewhere outside of Study Area	£10.4	£8.1	£3.6	£4.6	£6.5	£8.9	£7.5	£43.8	£24.0	£1.3	£56.8	£175.5
Sub-Total Outside of Havering	£31.1	£49.3	£14.3	£33.2	£44.3	£28.8	£17.0	£95.6	£103.3	£46.8	£197.2	£661.0
Total	£143.9	£173.3	£55.8	£93.8	£102.2	£135.8	£104.7	£152.8	£159.8	£71.2	£233.8	£1,427.2

TABLE B4.16: COMPARISON SHOPPING - TOTAL COMPARISON SPEND 2038 (£m)*Excluding Internet Shopping and other Special Forms of Trading*

Store /Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	Romford	Hornchurch	Rush Green	Elm Park	Upminster	Harold Hill	Collier Row	Chadwell Heath	Dagenham	Rainham	Brentwood	
Available Spend 2038	£168.9	£203.3	£65.6	£109.9	£119.1	£159.8	£122.3	£177.3	£185.1	£83.9	£270.6	£1,665.8
Romford Metropolitan Centre	£65.2	£48.1	£25.8	£20.7	£9.4	£47.4	£44.4	£48.5	£44.8	£4.0	£9.0	£367.6
Collier Row District Centre	£1.5	£0.5	£0.1	£0.0	£0.0	£0.3	£11.5	£0.0	£0.3	£0.0	£0.2	£14.4
Elm Park District Centre	£0.0	£2.6	£0.0	£3.4	£1.6	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£7.7
Harold Hill District Centre	£0.0	£0.1	£0.0	£0.0	£0.0	£6.9	£0.6	£0.0	£0.0	£0.2	£0.0	£7.9
Hornchurch District Centre	£4.8	£23.5	£1.3	£15.9	£3.8	£1.6	£0.3	£0.2	£0.5	£2.5	£0.6	£55.0
Rainham District Centre	£0.0	£0.0	£0.3	£1.9	£0.5	£0.0	£0.4	£0.0	£3.3	£14.2	£4.3	£24.9
Upminster District Centre	£6.8	£2.6	£1.1	£2.4	£31.3	£1.4	£2.1	£0.9	£0.2	£1.0	£2.3	£52.1
Sub-Total Havering Main Centres	£78.3	£77.5	£28.5	£44.3	£46.7	£57.7	£59.3	£49.6	£49.2	£21.9	£16.4	£529.5
Elsewhere in Havering	£54.0	£67.9	£20.3	£26.7	£20.9	£68.2	£43.0	£16.8	£16.2	£6.8	£26.0	£366.9
Sub-Total Havering Borough	£132.3	£145.4	£48.8	£71.0	£67.5	£125.9	£102.4	£66.4	£65.4	£28.7	£42.4	£896.3
Outside of Havering												
Elsewhere in Study Area	£1.3	£0.7	£4.1	£1.4	£1.0	£4.6	£1.2	£43.0	£60.4	£3.4	£119.3	£240.4
Lakeside	£23.1	£47.7	£8.5	£32.1	£43.0	£18.8	£9.9	£17.1	£31.5	£50.3	£43.1	£325.1
Elsewhere outside of Study Area	£12.2	£9.5	£4.2	£5.4	£7.6	£10.5	£8.8	£50.8	£27.8	£1.5	£65.7	£204.0
Sub-Total Outside of Havering	£36.5	£57.9	£16.8	£38.9	£51.6	£33.9	£19.9	£110.9	£119.7	£55.2	£228.2	£769.5
Total	£168.9	£203.3	£65.6	£109.9	£119.1	£159.8	£122.3	£177.3	£185.1	£83.9	£270.6	£1,665.8

APPENDIX B5: RETAIL CAPACITY FORECASTS

B5.1 CONVENIENCE GOODS RETAIL CAPACITY FORECAST TABLES:

TABLE B5.1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)

	2023	2028	2033	2038
Romford Metropolitan Centre	£88.6	£89.6	£91.7	£94.1
Collier Row District Centre	£19.8	£20.1	£20.5	£21.0
Elm Park District Centre	£3.2	£3.3	£3.4	£3.4
Harold Hill District Centre	£0.2	£0.2	£0.2	£0.2
Hornchurch District Centre	£85.4	£86.4	£88.6	£91.0
Rainham District Centre	£28.0	£28.3	£28.9	£29.7
Upminster District Centre	£58.3	£58.8	£60.0	£61.4
Elsewhere in LB Havering	£339.6	£343.6	£351.6	£360.9
TOTAL CONVENIENCE TURNOVER OF BOROUGH STORES/CENTRES:	£623.2	£630.2	£644.8	£661.7

Notes:

Excludes SFT & 'Inflow' from outside Study Area

Assume constant market shares over forecast period.

TABLE B5.2: ESTIMATION OF INFLOW/ VISITOR EXPENDITURE

	Assumed Inflow	2023	2028	2033	2038
Romford Metropolitan Centre	20%	£110.7	£112.0	£114.6	£117.6
Collier Row District Centre	5%	£20.9	£21.2	£21.6	£22.1
Elm Park District Centre	5%	£3.4	£3.4	£3.5	£3.6
Harold Hill District Centre	5%	£0.2	£0.2	£0.2	£0.2
Hornchurch District Centre	5%	£89.9	£90.9	£93.2	£95.8
Rainham District Centre	5%	£29.5	£29.7	£30.4	£31.3
Upminster District Centre	5%	£61.4	£61.8	£63.2	£64.6
Elsewhere in LB Havering	5%	£357.5	£361.7	£370.1	£379.9
TOTAL		£673.5	£681.0	£696.9	£715.1

TABLE B5.3: COMMITTED CONVENIENCE GOODS FLOORSPACE

Location	Planning Application Reference	Net Sales Area (Sq m)	Sales Density (£/sq m)	2023	2028	2033	2038
Romford Ice Rink (Policy SSA 7)	P0615.21	210	£10,000	£2.1	£2.1	£2.1	£2.2
Sainsbury's Local, Beam Park (Policy SSA 11)		266	£13,939	£3.7	£3.7	£3.8	£3.9
TOTAL COMMITTED CONVENIENCE GOODS TURNOVER				£5.8	£5.8	£5.9	£6.1

Source: LBTH, LSH

Details of the various commitments are provided in the main report (Section 7). It is assumed that the proposed retail floorspace will achieve average convenience sales densities of £10,000 per sqm in 2023 where the operator is unknown. For Sainsbury's the sales density is informed by data from Globaldata

TABLE B5.4: HAVERING - CONVENIENCE GOODS CAPACITY

	2023	2028	2033	2038
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£673.5	£681.0	£696.9	£715.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£673.5	£676.9	£689.1	£703.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£4.2	£7.8	£12.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£5.8	£5.9	£6.1
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.6	£1.8	£6.1
STEP 6: CAPACITY FOR CONVENIENCE FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
(ii) Net Floorspace Capacity (sq m):	-	-164	177	580
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-234	253	828

Notes:

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

STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2023) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2028.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance of superstore operators (i.e. Tesco, Asda,

TABLE B5.5: ROMFORD METROPOLITAN CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£110.7	£112.0	£114.6	£117.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£110.7	£111.3	£113.3	£115.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.7	£1.3	£2.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£2.1	£2.1	£2.2
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.4	-£0.9	-£0.2
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	-136	-84	-17
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-194	-121	-24

TABLE B5.6: COLLIER ROW DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£20.9	£21.2	£21.6	£22.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£20.9	£21.0	£21.4	£21.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.3	£0.3
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.2	£0.3	£0.3
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	19	25	32
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		28	36	46

TABLE B5.7: ELM PARK DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£3.4	£3.4	£3.5	£3.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£3.4	£3.4	£3.5	£3.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.1
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.0	£0.0	£0.1
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	2	5	7
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		3	6	10

TABLE B5.8: HAROLD HILL DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£0.2	£0.2	£0.2	£0.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£0.2	£0.2	£0.2	£0.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.0	£0.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.0	£0.0	£0.0
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	0	0	1
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		0	1	1

TABLE B5.9: HORNCHURCH DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£89.9	£90.9	£93.2	£95.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£89.9	£90.4	£92.0	£93.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.6	£1.2	£1.9
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.6	£1.2	£1.9
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	57	118	182
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		82	169	260

TABLE B5.10: RAINHAM DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£29.5	£29.7	£30.4	£31.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£29.5	£29.6	£30.1	£30.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.3	£0.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.1	£0.3	£0.5
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	13	30	51
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		19	42	72

TABLE B5.11: UPMINSTER DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£61.4	£61.8	£63.2	£64.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£61.4	£61.7	£62.8	£64.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.4	£0.6
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.1	£0.4	£0.6
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	15	35	54
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		21	51	77

TABLE B5.12: ELSEWHERE IN HAVERING - CONVENIENCE GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£357.5	£361.7	£370.1	£379.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£357.5	£359.3	£365.8	£373.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£2.4	£4.3	£6.7
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£3.7	£3.8	£3.9
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.4	£0.5	£2.8
STEP 6:	CAPACITY FOR CONVENIENCE FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,050	£10,232	£10,438
	(ii) Net Floorspace Capacity (sq m):	-	-135	48	270
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-193	69	386

TABLE B5.13: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT (NET SQ M)

	2028	2033	2038
Romford Metropolitan Centre	-136	-84	-17
Collier Row District Centre	19	25	32
Elm Park District Centre	2	5	7
Harold Hill District Centre	0	0	1
Hornchurch District Centre	57	118	182
Rainham District Centre	13	30	51
Upminster District Centre	15	35	54
Elsewhere in LB Havering	-135	48	270
Total Convenience Goods Floorspace Capacity	164	177	580

Note: Assumes Equilibrium at Base Year (2023) and Constant Market Shares

B5.2 Comparison GOODS RETAIL CAPACITY FORECAST TABLES:

TABLE B5.14: TOTAL ALLOCATED Comparison GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)

	2023	2028	2033	2038
Romford Metropolitan Centre	£250.5	£271.0	£314.4	£367.6
Collier Row District Centre	£9.7	£10.6	£12.3	£14.4
Elm Park District Centre	£5.2	£5.6	£6.5	£7.7
Harold Hill District Centre	£5.2	£5.7	£6.7	£7.9
Hornchurch District Centre	£37.1	£40.2	£46.9	£55.0
Rainham District Centre	£16.9	£18.3	£21.3	£24.9
Upminster District Centre	£35.6	£38.4	£44.6	£52.1
Elsewhere in LB Havering	£248.8	£269.7	£313.4	£366.9
TOTAL COMPARISON TURNOVER OF BOROUGH STORES/CENTRES:	£609.1	£659.6	£766.2	£896.3

Notes:

Excludes SFT & 'Inflow' from outside Study Area

Assume constant market shares over forecast period.

TABLE B5.15: ESTIMATION OF INFLOW/ VISITOR EXPENDITURE

	Assumed Inflow	2023	2028	2033	2038
Romford Metropolitan Centre	20%	£313.1	£338.8	£393.0	£459.4
Collier Row District Centre	5%	£10.3	£11.2	£12.9	£15.1
Elm Park District Centre	5%	£5.5	£5.9	£6.9	£8.1
Harold Hill District Centre	5%	£5.5	£6.0	£7.0	£8.3
Hornchurch District Centre	5%	£39.0	£42.4	£49.4	£57.9
Rainham District Centre	5%	£17.8	£19.3	£22.4	£26.2
Upminster District Centre	5%	£37.4	£40.5	£47.0	£54.9
Elsewhere in LB Havering	5%	£261.9	£283.8	£329.9	£386.2
TOTAL		£690.6	£747.8	£868.6	£1,016.0

TABLE B5.16: COMMITTED COMPARISON GOODS FLOORSPACE

Location	Planning Application Reference	Net Sales Area (Sq m)	Sales Density (£/sq m)	2023	2028	2033	2038
Romford Ice Rink (Policy SSA 7)	P0615.21	240	£5,500	£1.3	£1.4	£1.6	£1.9
TOTAL COMMITTED COMPARISON GOODS TURNOVER				£1.3	£1.4	£1.6	£1.9

Source: LBTH, LSH

Details of the various commitments are provided in the main report (Section 7). It is assumed that the proposed retail floorspace will achieve average comparison sales densities of £5,500 per sqm in 2023.

TABLE B5.17: HAVERING - COMPARISON GOODS CAPACITY

	2023	2028	2033	2038
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£690.6	£747.8	£868.6	£1,016.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£690.6	£747.4	£858.9	£995.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£9.7	£20.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£1.4	£1.6	£1.9
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.0	£8.0	£18.4
STEP 6: CAPACITY FOR COMPARISON FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
(ii) Net Floorspace Capacity (sq m):	-	-172	1,173	2,323
(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
(iv) Gross Floorspace Capacity (sq m):		-215	1,466	2,903

Notes:

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

STEP 2: It has been assumed for the purpose of this assessment that the Borough's COMPARISON retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2023) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2028.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance of superstore operators (i.e. Tesco, Asda,

TABLE B5.18: ROMFORD METROPOLITAN CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£313.1	£338.8	£393.0	£459.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£313.1	£338.9	£389.5	£451.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£3.6	£7.9
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£1.4	£1.6	£1.9
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.6	£1.9	£6.0
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	-264	279	762
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		-329	349	953

TABLE B5.19: COLLIER ROW DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£10.3	£11.2	£12.9	£15.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£10.3	£11.1	£12.8	£14.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.2	£0.3
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.1	£0.2	£0.3
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	9	27	41
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		12	34	52

TABLE B5.20: ELM PARK DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£5.5	£5.9	£6.9	£8.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£5.5	£5.9	£6.8	£7.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.1	£0.2
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.0	£0.1	£0.2
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	0	14	24
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		1	17	30

TABLE B5.21: HAROLD HILL DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£5.5	£6.0	£7.0	£8.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£5.5	£6.0	£6.9	£8.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.2	£0.3
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.1	£0.2	£0.3
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	9	26	41
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		12	32	51

TABLE B5.22: HORNCHURCH DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£39.0	£42.4	£49.4	£57.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£39.0	£42.3	£48.6	£56.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.8	£1.6
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.1	£0.8	£1.6
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	16	116	197
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		20	145	246

TABLE B5.23: RAINHAM DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£17.8	£19.3	£22.4	£26.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£17.8	£19.3	£22.2	£25.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.0	£0.2	£0.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.0	£0.2	£0.5
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	-5	33	66
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		-6	41	82

TABLE B5.24: UPMINSTER DISTRICT CENTRE - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£37.4	£40.5	£47.0	£54.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£37.4	£40.5	£46.6	£54.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	£0.4	£0.9
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£0.1	£0.4	£0.9
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	-10	59	108
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		-13	74	135

TABLE B5.25: ELSEWHERE IN HAVERING - COMPARISON GOODS CAPACITY

		2023	2028	2033	2038
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£261.9	£283.8	£329.9	£386.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£261.9	£283.4	£325.7	£377.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£4.2	£8.6
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.4	£4.2	£8.6
STEP 6:	CAPACITY FOR COMPARISON FLOORSPACE:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,953	£6,841	£7,930
	(ii) Net Floorspace Capacity (sq m):	-	71	619	1,084
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		89	774	1,355

TABLE B5.26: SUMMARY TABLE - COMPARISON GOODS CAPACITY ASSESSMENT (NET SQ M)

	2028	2033	2038
Romford Metropolitan Centre	-264	279	762
Collier Row District Centre	9	27	41
Elm Park District Centre	0	14	24
Harold Hill District Centre	9	26	41
Hornchurch District Centre	16	116	197
Rainham District Centre	-5	33	66
Upminster District Centre	-10	59	108
Elsewhere in LB Havering	71	619	1,084
Total COMPARISON Goods Floorspace Capacity	172	1,173	2,323

Note: Assumes Equilibrium at Base Year (2023) and Constant Market Shares

B6: LEISURE EXPENDITURE

TABLE B2.1: BASE YEAR POPULATION & PROJECTIONS (2023 - 2038) - ONS Projections (via Experian)

	2023	2028	2033	2038	Growth 2023 to 2033:		Growth 2023 to 2038:	
					%	No.	%	No.
Zone 1 Romford	42,656	43,910	44,989	46,035	5.5%	2,333	7.9%	3,379
Zone 2 Hornchurch	50,932	52,339	53,633	54,858	5.3%	2,701	7.7%	3,926
Zone 3 Rush Green	20,260	20,869	21,401	21,936	5.6%	1,141	8.3%	1,676
Zone 4 Elm Park	30,242	30,905	31,640	32,329	4.6%	1,398	6.9%	2,087
Zone 5 Upminster	29,118	29,692	30,263	30,749	3.9%	1,145	5.6%	1,631
Zone 6 Harold Hill	46,751	48,293	49,597	50,875	6.1%	2,846	8.8%	4,124
Zone 7 Collier Row	32,887	33,836	34,470	35,078	4.8%	1,583	6.7%	2,191
Zone 8 Chadwell Heath	64,913	65,392	65,926	66,693	1.6%	1,013	2.7%	1,780
Zone 9 Dagenham	69,474	70,087	70,627	71,351	1.7%	1,153	2.7%	1,877
Zone 10 Rainham	23,553	24,279	24,979	25,666	6.1%	1,426	9.0%	2,113
Zone 11 Brentwood	62,487	62,619	63,088	63,651	1.0%	601	1.9%	1,164
Total Study Area:	473,273	482,221	490,613	499,221	3.7%	17,340	5.5%	25,948

Source: Experian Business Strategies - MMG3 Geographic Information System (GIS) 'Retail Area Planner Population & Expenditure Datasets'

Notes: Population projections (2023 to 2038) are derived from Experian and based on ONS 2018-based Sub-National Population Projections (released in June 2020).

TABLE B6.1: LEISURE EXPENDITURE PER HEAD (2021 prices)

	Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total 2021	Total 2023
Zone 1 Romford	£240	£364	£163	£88	£279	£1,578	£2,712	£3,290
Zone 2 Hornchurch	£232	£360	£172	£90	£299	£1,457	£2,610	£3,166
Zone 3 Rush Green	£169	£295	£121	£64	£200	£1,410	£2,259	£2,741
Zone 4 Elm Park	£195	£320	£154	£84	£235	£1,346	£2,334	£2,831
Zone 5 Upminster	£251	£389	£189	£101	£331	£1,470	£2,731	£3,313
Zone 6 Harold Hill	£166	£297	£162	£64	£221	£1,291	£2,201	£2,670
Zone 7 Collier Row	£194	£322	£163	£76	£227	£1,331	£2,313	£2,806
Zone 8 Chadwell Heath	£146	£251	£106	£50	£155	£1,335	£2,043	£2,478
Zone 9 Dagenham	£129	£237	£118	£44	£150	£1,233	£1,911	£2,318
Zone 10 Rainham	£173	£307	£150	£73	£232	£1,266	£2,201	£2,670
Zone 11 Brentwood	£271	£369	£229	£95	£190	£1,582	£2,736	£3,319

Source: Expenditure data from Experian Business Strategies - Location Analyst

Expenditure growth 2021 - 2023 from ERPBN 20 Figure 1a

TABLE B6.2: TOTAL AVAILABLE LEISURE EXPENDITURE - 2023 to 2038

	2023	2028	2033	2038	Growth 2023 2033		Growth 2023 2038	
Zone 1 Romford	£140.3	£150.0	£160.9	£172.2	£20.6	14.7%	£31.9	22.7%
Zone 2 Hornchurch	£161.3	£172.1	£184.6	£197.5	£23.4	14.5%	£36.2	22.5%
Zone 3 Rush Green	£55.5	£59.4	£63.8	£68.4	£8.2	14.8%	£12.8	23.1%
Zone 4 Elm Park	£85.6	£90.9	£97.4	£104.1	£11.8	13.7%	£18.4	21.5%
Zone 5 Upminster	£96.5	£102.2	£109.0	£115.8	£12.5	13.0%	£19.4	20.1%
Zone 6 Harold Hill	£124.8	£133.9	£144.0	£154.5	£19.1	15.3%	£29.6	23.7%
Zone 7 Collier Row	£92.3	£98.6	£105.2	£111.9	£12.9	14.0%	£19.6	21.3%
Zone 8 Chadwell Heath	£160.9	£168.3	£177.6	£187.9	£16.8	10.4%	£27.1	16.8%
Zone 9 Dagenham	£161.1	£168.7	£178.0	£188.1	£16.9	10.5%	£27.0	16.8%
Zone 10 Rainham	£62.9	£67.3	£72.5	£77.9	£9.6	15.3%	£15.0	23.9%
Zone 11 Brentwood	£207.4	£215.9	£227.7	£240.2	£20.3	9.8%	£32.8	15.8%
Total Study Area:	£3,371.6	£3,455.3	£3,553.7	£3,656.5	£182.1	5.4%	£284.9	8.4%

TABLE B6.3: STUDY AREA LEISURE EXPENDITURE GROWTH BY LEISURE CATEGORY - 2023 to 2038

	2023	2028	2033	2038	Growth (£m):	
					2023 2033	2023 2038
Accommodation services (hotels, guesthouses, B&Bs)	£276.9	£283.8	£291.9	£300.4	£15.0	£23.4
Cultural services (cinema, theatre, concerts, etc)	£452.9	£464.2	£477.4	£491.2	£24.5	£38.3
Games of chance (bingo, casino, betting)	£222.0	£227.5	£234.0	£240.8	£12.0	£18.8
Personal grooming (hairdressers, barbers, etc)	£105.9	£108.5	£111.6	£114.9	£5.7	£8.9
Recreational and sporting services (gym, fitness, etc)	£323.6	£331.6	£341.0	£350.9	£17.5	£27.3
Restaurants, cafes, bars, etc	£1,990.2	£2,039.7	£2,097.7	£2,158.4	£107.5	£168.2
Total Study Area Expenditure:	£3,371.6	£3,455.3	£3,553.7	£3,656.5	£182.1	£284.9