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Havering Retail & Town Centres Study

VOLUME C: HEALTH CHECKS

Prepared on behalf of

London Borough of Havering

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HAVERING – TOWN CENTRE HEALTH CHECKS

ROMFORD

Description

Romford is the largest town in Havering and acts as the principal shopping centre for the borough's residents and visitors from further afield including east London and Essex.

The defined town centre of Romford comprises the area within the A125/A12451 Ring road, along with an area to the north east (which includes the Mercury Shopping Centre, an Asda foodstore and various public and civic buildings).

It has a strong retail offer, anchored by the three shopping centres (The Liberty, The Mercury and The Brewery) and Romford Shopping Hall, but is also an important office and leisure destination with an evening and night-time offer. Romford Market also operates four days a week from Market Place with over 150 stalls on offer.

Romford has a distinctive historic core, focussed around the Market Place, which is an important part of its overall attractiveness as a commercial centre. The Council has identified that the regeneration of the wider town centre is required to ensure further development and new facilities can be delivered.

The Primary Shopping Area (PSA) comprises South Street, much of which is pedestrianised, along with Market Place. This area includes The Liberty shopping centre which is the focus of the centre's retail provision.

The Secondary Shopping Area (SSA) comprises High Street to the north and the South Street / Victoria Road area south of the railway station.

Romford Conservation Area covers part of the centre – most of High Street, some of South Street, Market Place and North Street. This designation recognises the architectural and historical significance of the area and looks to preserve and enhance this in the future.

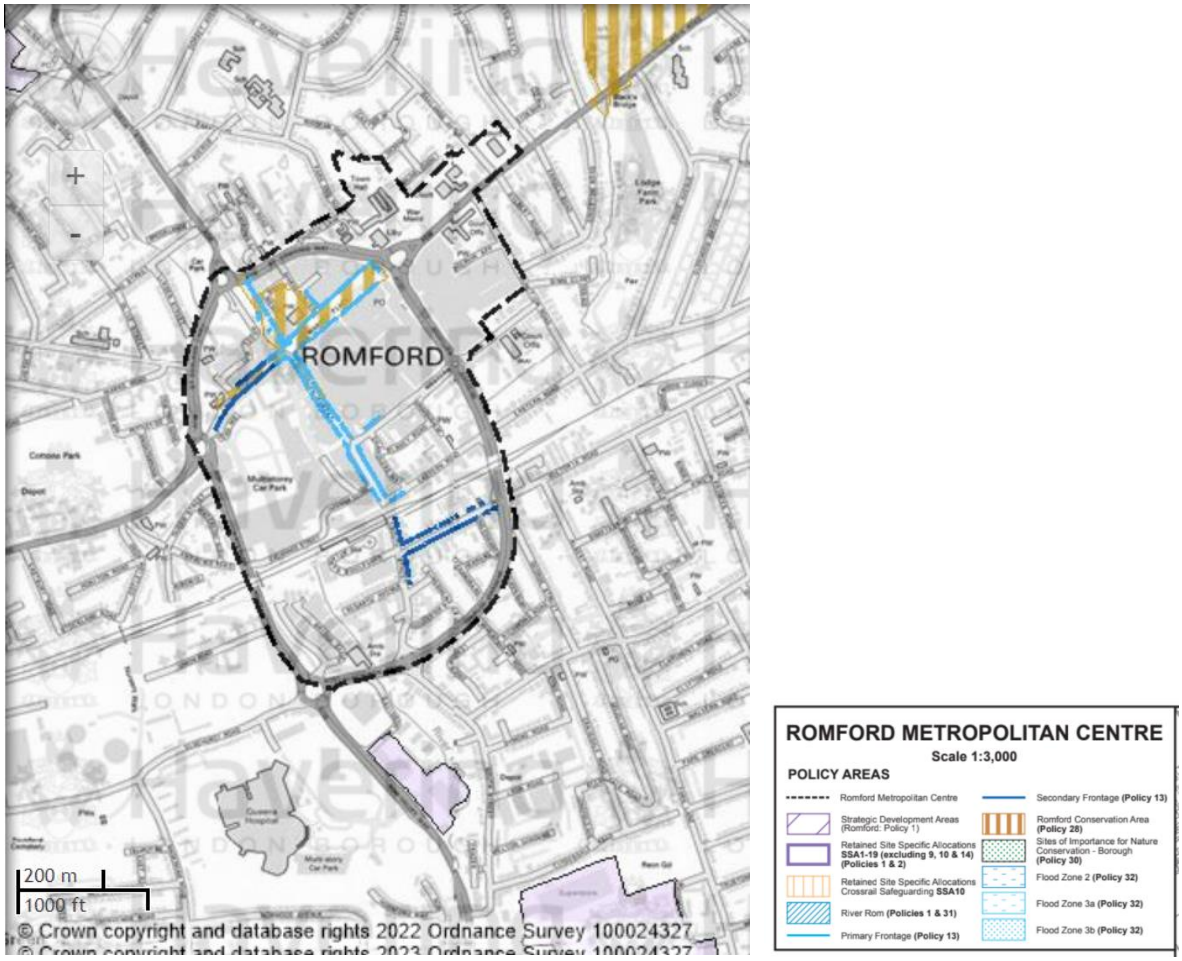
The main centres comprise:

- **The Liberty Centre**, a covered shopping centre built in 1968 providing 432,000 square feet (40,100 m^2) of floorspace in 100 units and an 800 space car park.
- **The Mercury Centre,** an enclosed shopping centre which opened in June 1990 providing 188,000 square feet (17,500 m2) of floorspace.
- **The Brewery Centre**, a large mixed-use retail and leisure park extending to 530,000 sqft on a 7.56ha site. It includes both surface and multi-storey parking and uses include food stores, retail units, restaurants, a cinema, petrol station, tenpin bowling and games centre and a fitness & wellbeing gym.

Current Designation:

Romford is defined as a Metropolitan Centre in both The London Plan 2021 and Havering's Local Plan (adopted 2021). It is the highest order centre within the London Borough of Havering.

Figure 1.1: Romford Town Centre



Source: Havering Local Plan Policies Map

Current Planning Policies / Designations:

- Romford is identified as having high potential for commercial and residential growth in The London Plan.
- It is also within a Strategic Area for Regeneration within the London Plan.
- The centre has a B grade for Office Guidance (London Plan) which means it has the capacity, demand and viability to accommodate new office development, generally as part of mixed-use development.
- Romford is identified in the NT2 night-time economy classification in the London Plan, meaning the centre is of regional or sub-regional significance.
- The regeneration of Romford Town Centre, to provide a more diverse and higher quality retail, leisure, cultural and employment offer is promoted in the Havering's Local Plan (adopted 2021). Policy 1 (Romford Strategic Development Area) seeks to strengthen Romford's role as a metropolitan centre and to realise its potential as one of Outer London's largest and most successful town centres.
- Sites allocated for development (2008) include:
    - **Romford Ice Rink** (Policy SSA 7) which is allocated for mixed use development comprising residential, leisure and retail facilities on the site. Planning permission for

the development of the site was granted in September 2023 (see main report for further details);

- **Angel Way** (Site ROMSSA1) which is allocated for a mix of residential, retail, leisure and commercial development. Planning permission for the development of the site has been granted (see main report for further details);
- **Bridge Close** (Site ROMSSA2) which is allocated for residential development with some commercial (A3) uses;
- **Como Street** (Site ROMSSA3) which is allocated for residential development with ancillary fringe retail uses along North Street;
- **18-46 High Street** (Site ROMSSA4) which is allocated for residential, retail and commercial uses;
- **37-59 High Street** (Site ROMSSA5) which is allocated for residential, retail and commercial uses; and
- **Station Gateway and Interchange** (Site ROMSSA6) which is allocated for a major transport interchange and residential, retail, leisure and commercial uses.

Town Centre Support:

In addition to having a Town Centre Manager at the LB of Havering, Romford town centre benefits from being a Business Improvement District (BID). The BID acts as a point of contact between businesses and the Council and seeks to organise events to drive footfall in the town centre. It also seeks to promote businesses, market the town and promote safety and security. This has included involvement with the 'My Local Bobby' initiative. The BID is also seeking to improve the public realm.

Key projects in 2023 are:

- **Market Stalls** – the BID started sponsoring market stalls in 2021 and in 2023 as well as sponsoring two pitches over Saturday and Sunday each weekend for up to 6 months (April to October), they are offering support to those who wish to trial the Market. This will allow the business to become established on the Market with the for it to eventually become self-sufficient on the Market, and/ or take that next step by expanding and having a regular pitch on Romford Market or maybe a unit within Romford. The BID has also been working with the Romford Market Management Team to provide a Support Programme for new marker traders.
- **Britain in Bloom**[1] – during 2023 Romford BID transformed urban areas within the town through the introduction of hanging baskets, planters, raised beds, community gardens and living walls to encourage sustainability, help wildlife and make some areas of the town more appealing and enticing. The town was selected as a finalist in the 2023 RHS Britain in Bloom Awards, (BIDs Town Centres & City Centres category).
- **First Mile Recycling** - Romford BID has appointed First Mile, commercial waste and recycling specialists, to bring an efficient service to Romford BID members that benefit them both economically and environmentally. It provides a subsidy to encourage the use of the service and First Mile seeks to make it easy for UK businesses to recycle and improve corporate sustainability and can recycle over 20 different types of materials. It has a no landfill policy, so that anything that can't be recycled is turned into green energy.[2]

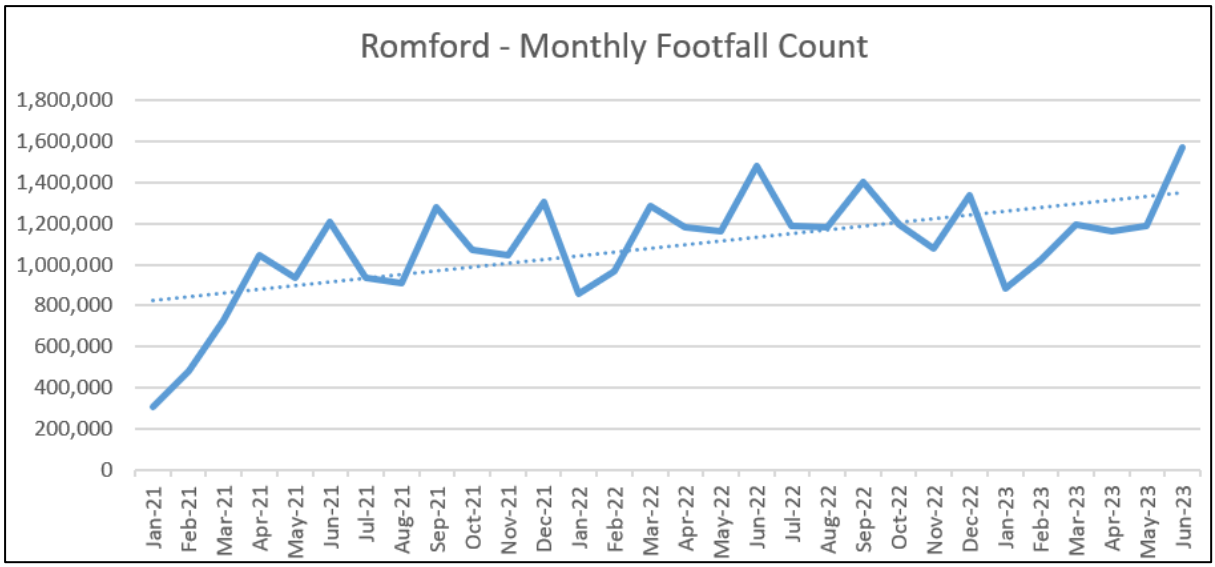
[1] Home - London In Bloom
[2] https://romfordbid.co.uk/projects/projects-2023/

Footfall:

Footfall data provided by the Council has been used to demonstrate footfall trends and changes between January 2021 and June 2023. Monthly figures have been used, with the graph below showing the month-by-month figures along with a trendline.

As can be seen, Romford town centre's pedestrian activity has grown significantly post-pandemic, with a low of 308,000 in January 2021 and a high of 1,569,000 in June 2023. Monthly figures are now consistently topping one million, with January 2023 standing out as the obvious exception where footfall dips post-Christmas.

Figure 1.2: Romford – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

The below footfall heatmap represents pedestrian activity in October 2023 and helps to identify which parts of the town centre see the highest levels of footfall.

As can be seen, concentrations of pedestrian activity are found to the southern end of The Brewery (by the Sainsbury's store), along Western Road and within The Liberty Shopping Centre. Footfall is also high around Romford station due to the transport links available.

Figure 1.3: Romford Footfall Heat Map

Source: Datscha

Catchment Area:

Romford town centre is located within Zone 1 of the Study Area (its 'home zone'). It has an extensive draw across the whole area and beyond, which reflects its attraction and offer, and status as a Metropolitan Centre.

It is visited at least once a week or more by 28% of all respondents. Considerably more respondents in the home Zone 1 and Zone 3 (Rush Green) visit the centre this frequently (60% and 58% respectively). Respondents from Zones 7 and 8 (Collier Row and Chadwell Heath) also visit relatively frequently (at least monthly).

Visits to Romford town centre are least likely from Zones 5 (Upminster), 10 (Rainham) and 11 (Brentwood) where 38%, 43% and 45% respectively never visit. This reflects the influence of more convenient competing attractions and centres in these zones.

Table 1.1: Frequency of Visit to Romford Town Centre

Frequency of Visit to Romford Town Centre (Q22)	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Daily	1%	2%	1%	3%	3%	0%	3%	1%	2%	0%	0%	0%
4-6 days a week	2%	4%	2%	7%	2%	0%	0%	3%	3%	0%	2%	0%
2-3 days a week	7%	21%	4%	26%	8%	0%	4%	13%	6%	4%	1%	4%
One day a week	18%	33%	23%	22%	21%	10%	18%	21%	22%	16%	15%	0%
At least once a week	28%	60%	30%	58%	34%	10%	25%	38%	33%	20%	18%	5%
Every two weeks	12%	10%	15%	9%	11%	8%	14%	20%	21%	17%	6%	3%
Monthly	15%	11%	14%	12%	10%	17%	27%	20%	19%	17%	9%	6%
At least once a month	55%	81%	59%	79%	56%	36%	66%	78%	73%	54%	34%	14%
Once every two months	8%	4%	11%	9%	8%	8%	4%	6%	6%	16%	1%	11%
Three-four times a year	9%	5%	8%	2%	9%	12%	6%	7%	11%	17%	10%	7%
Once a year	5%	0%	8%	1%	4%	3%	9%	3%	2%	2%	8%	11%
Less often	4%	0%	0%	0%	4%	4%	6%	0%	3%	3%	4%	12%
Never / don't Know / Varies	19%	10%	14%	10%	19%	38%	10%	5%	5%	8%	43%	45%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Household Survey, Q22

Use of Centre:

The main reason for visiting Romford is for shopping (66%), followed by visiting leisure/entertainment venues (5%) and food & beverage (F&B) outlets (4%).

The retail offer is less of a draw for respondents living in Zone 3 (Rush Green) and Zone 5 (Upminster) for whom the leisure or Food & Beverage ('F&B') offer is a more popular draw. The leisure / entertainment offer is also important for a minority of Zone 7 (Collier Row) and Zone 11 (Brentwood) respondents.

Table 1.2: Main Reasons for Visiting Romford Town Centre

Main Reasons for Visiting Romford Town Centre (Q23)	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Shopping in general	38%	43%	47%	14%	32%	15%	52%	41%	33%	50%	25%	29%
Non-food shopping	20%	19%	18%	18%	32%	28%	11%	22%	23%	17%	29%	16%
Food shopping	8%	16%	5%	22%	7%	4%	13%	7%	6%	7%	2%	5%
Visit leisure entertainment venues e.g. cinemas	5%	4%	6%	4%	4%	9%	0%	11%	0%	2%	4%	12%
Visit cafés, restaurants, and takeaways	4%	1%	6%	12%	1%	3%	4%	1%	4%	8%	2%	3%
To meet family/ friends	3%	6%	1%	0%	6%	8%	2%	0%	1%	3%	1%	9%
Visiting financial services e.g. banks, building society etc	3%	4%	5%	4%	1%	5%	1%	5%	5%	1%	1%	0%
Visit street market	3%	3%	0%	3%	1%	3%	3%	2%	2%	3%	6%	3%
Visit sports and fitness venues	2%	1%	0%	2%	4%	0%	3%	2%	4%	2%	5%	0%
For work/ business	2%	0%	5%	5%	1%	0%	1%	2%	2%	1%	7%	0%

Source: Household Survey, Q23

Customer Views:

Respondents to the household survey valued their proximity to Romford Town Centre, particularly those resident in Zones 1, 2 and 3 (Romford, Hornchurch and Rush Green). For respondents living slightly further away, the range of non-food shops was the main draw followed by the food stores.

Table 1.3: Main Likes about Romford Town Centre

Main Likes about Romford Town Centre (Q24)	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Close to home	16%	25%	29%	30%	13%	3%	9%	20%	19%	10%	11%	1%
Good range of non-food shops	15%	6%	17%	17%	20%	12%	16%	16%	14%	18%	12%	15%
Good food stores	4%	6%	3%	11%	5%	1%	11%	3%	0%	3%	3%	0%
Easy to get to by bus	3%	1%	3%	1%	6%	6%	8%	6%	1%	1%	9%	0%
The market	3%	5%	1%	6%	4%	6%	5%	2%	4%	2%	5%	1%
Compact	3%	0%	2%	0%	2%	4%	4%	2%	3%	8%	1%	2%
Easy to park	3%	0%	6%	0%	1%	9%	0%	1%	4%	4%	1%	1%
Good pubs, cafés or restaurants	2%	3%	1%	6%	1%	1%	2%	0%	0%	6%	2%	0%
Attractive environment / nice place	2%	2%	1%	0%	0%	7%	6%	2%	2%	0%	1%	2%
Easy to get to by car	2%	0%	6%	0%	2%	0%	0%	3%	0%	3%	0%	0%

Source: Household Survey, Q24

The main improvements that respondents would like to see are:

- the provision of more shops - more national multiples / high street stores (13%) and non-food shops generally (6%);
- by better parking provision -free car parking (8%) and more / better parking (5%); and
- improvements to safety and security.

Table 1.4: Main Improvements Suggested for Romford Town Centre

Main Improvements suggested for Romford Town Centre (Q25)	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
More national multiple shops / High Street shops	13%	24%	15%	7%	17%	13%	21%	14%	12%	9%	6%	2%
Free car parking	8%	11%	16%	2%	13%	13%	7%	9%	2%	4%	20%	1%
More / better security / improved safety	7%	3%	8%	9%	7%	14%	5%	2%	10%	7%	5%	3%
More / better comparison retailers (i.e. non-food shops)	6%	10%	7%	10%	7%	6%	3%	8%	4%	2%	10%	2%
Better market	5%	6%	9%	10%	9%	2%	11%	5%	0%	3%	7%	1%
More / better parking	5%	7%	9%	3%	3%	2%	2%	9%	2%	1%	4%	6%
Cleaner streets	4%	5%	4%	8%	5%	5%	8%	1%	2%	3%	8%	1%
More / better food shops	1%	2%	1%	3%	4%	0%	0%	2%	1%	0%	4%	1%
Better atmosphere / friendlier people	1%	0%	0%	1%	0%	1%	0%	2%	3%	2%	0%	2%
Revamp / update	1%	3%	1%	0%	3%	0%	1%	0%	0%	0%	3%	1%

Source: Household Survey, Q25

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- Romford had a good representation of national multiple retailers as well as a significant presence of independents, although the latter were mainly located in the secondary areas;
- The retail offer was firmly mid-market with an absence of middle or higher end retailers;
- Primark and Marks & Spencer were important anchors on South Street which otherwise had a poor quality retail offer;
- There was a good convenience offer in the centre;
- The retail offer was complemented by a good range of supporting retail services, two cinemas and a theatre as well as having an important civic function;
- The vacancy rate of 7% was below the UK average of 12.5%;
- Pedestrian circulation within the primary area was generally good and Market Place was a vibrant and well used civic space especially on market days; and
- The central retail core was generally of a good quality and recent public realm works had improved the appearance of the town centre. The main shortcomings were a lack of green space and sitting areas.

Peter Brett Associates (PBA) who undertook the HRCLNA concluded that:

Romford is the largest centre in the Borough and benefits from a strong comparison goods retail function. Our initial review of the composition of the town centre is that outward expansion of retail and other town centre uses should be resisted, with the ring road forming a logical town centre boundary. Most of the retailing activity takes place north of the railway with the area to the south performing a secondary role.

There is a quantitative and qualitative need for additional and improved food and drink floorspace across the town centre. Much of the existing food and drink offer is concentrated in The Brewery development and is 'hidden' from the rest of the town centre. The southern section of South Street - in

vicinity of the train station – could be a potential location for additional food and drink floorspace, capitalising on recent investment made by the Council in this area.

In our view, improvement and upgrading of the retail premises along South Street should be a priority for the Council early in the plan period. Improved configuration of units could be expected to account for some of the identified quantitative/qualitative needs that we have identified due to an improved turnover per sqm through better floorplates and a better mix of retailers. It will be necessary to consider how asset management could achieve this aim. Similarly the street market at Market Place could be gently nurtured towards providing a mix of goods that is unique among competing markets in the area. This would further diversify the retail offer.

A potential site for additional comparison goods floorspace provision could be the intensification of The Brewery development given the large surface level car park that exists. But this will need to be undertaken as part of a programme of works to better integrate this development with the rest of town centre, such as shared public realm or directional signposting. We would expect any development would require a strong anchor store.

Finally, we expect that the footfall within the town centre may change when Morrison's opens and we recommend that the situation is monitored.

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[3] within the town centre:

Table 1.5: Romford Diversity of Uses, March 2018

	Romford Town Centre		Romford Primary Frontage		Romford Secondary Frontage	
Total Units	**267**	**100%**	**157**	**100%**	**110**	**100%**
A1	118	44%	83	53%	35	32%
A2	31	12%	17	11%	14	13%
A3	33	12%	20	13%	13	12%
A4	9	3%	8	5%	1	1%
A5	9	3%	1	1%	8	7%
Sui Generis (Other)	14	5%	5	3%	9	8%
Sui Generis (Betting Shops)	8	3%	6	4%	2	2%
Sui Generis (Pay day loans)	3	1%	2	1%	1	1%
D1	5	2%	1	1%	5	5%
D2	3	1%	1	1%	1	1%
B1	5	2%	0	0%	5	5%
Vacant	29	11%	13	8%	16	15%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses (July 2022)

The Experian Goad Plan for Romford covers a similar area to the defined town centre, including but not limited to the primary and secondary frontage areas. The key difference is that Goad does not cover the mixed-use area to the south west around Bridge Close.

[3] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Table 1.6: Experian Goad Diversity of Uses, Romford

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Romford	UK Average		Romford	UK Average
Comparison Retail	167	27.1%	26.8%	66,583	33.9%	30.1%
Convenience Retail	56	9.1%	9.3%	32,516	16.6%	15.5%
Retail Services	85	13.8%	15.8%	10,414	5.3%	7.2%
Leisure Services	156	25.3%	25.5%	56,689	28.9%	26.4%
Financial & Business Service	51	8.3%	8.7%	7,674	3.9%	6.5%
Vacant	101	16.4%	13.8%	22,650	11.5%	13.7%
Total	616	100.0%	100.0%	196,526	100.0%	100.0%

Source: Experian Goad

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Experian have traditionally identified a number of national multiples that they consider to be key to understanding the strength of a centre's offer, but recent company failures mean this list is now out of date. The table below therefore lists those national multiples which LSH considers provide an indication of the strength and health of the centre. As such it is not intended to include all retailers, nor those which are found in the majority of centres.

Romford has a good representation of national multiples (defined as being part of a network of nine or more outlets) within the town centre, including convenience and comparison retailers and F&B and leisure operators.

Table 1.7: Key National Multiples Represented in Romford Town Centre (not exhaustive list)

Convenience Retailers	Comparison Retailers		Food & Beverage Operators	Leisure Operators
Asda	Clarks shoes	Boots	Five Guys	Laser Quest
Holland & Barrett	Marks & Spencer	Clintons	Patisserie Valerie	Premiere Cinema
Lidl	Moss	HMV	Pizza Express	Vue Cinema
Marks & Spencer	Next	Lush	Starbucks	Pure Gym
Sainsburys	Primark	Superdrug	Taco Bell	Nuffield Health Fitness & Wellbeing Gym
Tesco	River Island	The Body Shop	Wagamama	The Gym Group
	TK Maxx	Waterstones	Wetherspoons	
		WH Smith	Yates	

Source: Experian Goad; PMA Promis; LSH online research

Food and Beverage Provision

Romford town centre provides a varied F&B offer as would be expected for a Metropolitan centre. Compared with the UK average there appears to be a slightly above average proportion of fast food and takeaway outlets and a slightly below average number of public houses.

Table 1.8: Food and Beverage Provision Breakdown, Romford

Type of Use	Number	% All Town Centre Outlets	% UK Outlets
Bars & Wine Bars	7	1.1%	2.3%
Cafes	32	5.2%	5.0%
Fast Food & Takeaways	45	7.3%	6.1%
Public Houses	8	1.3%	2.6%
Restaurants	28	4.2%	4.9%
Total	120	19.1%	20.9%

Source: Experian Goad

Other Key Town Centre Uses

A successful town centre will provide a range of services and facilities in addition to its retail offer. In Romford there is a range of financial services, entertainment and cultural venues and sports facilities, including those listed below.

Table 1.9: Other Key Town Centre Uses, Romford

Type of Use	Number
Bank	13
Post Office (standalone)	1
Street Market	3 per week (150 stalls)
Library	1
Museum	1
Theatre	1
Council Offices	1
Sports & Leisure Facilities	10 including Ice Rink
Cinema	2 (16 & 8 screens)
Nightclub	2
GP / Medical Centre	4

Source: Experian Goad; PMA Promis; LSH online research

Conclusions on Diversity of Uses:

Romford's town centre offer is relatively close to the UK average as outlined within the diversity of uses table, providing a good range and mix of retail and services and supported by additional cultural, civic and public services.

The centre has a good offer in terms of national multiples in the retail and other sectors, although the food & beverage offer is slightly below average.

Evening / Night time economy

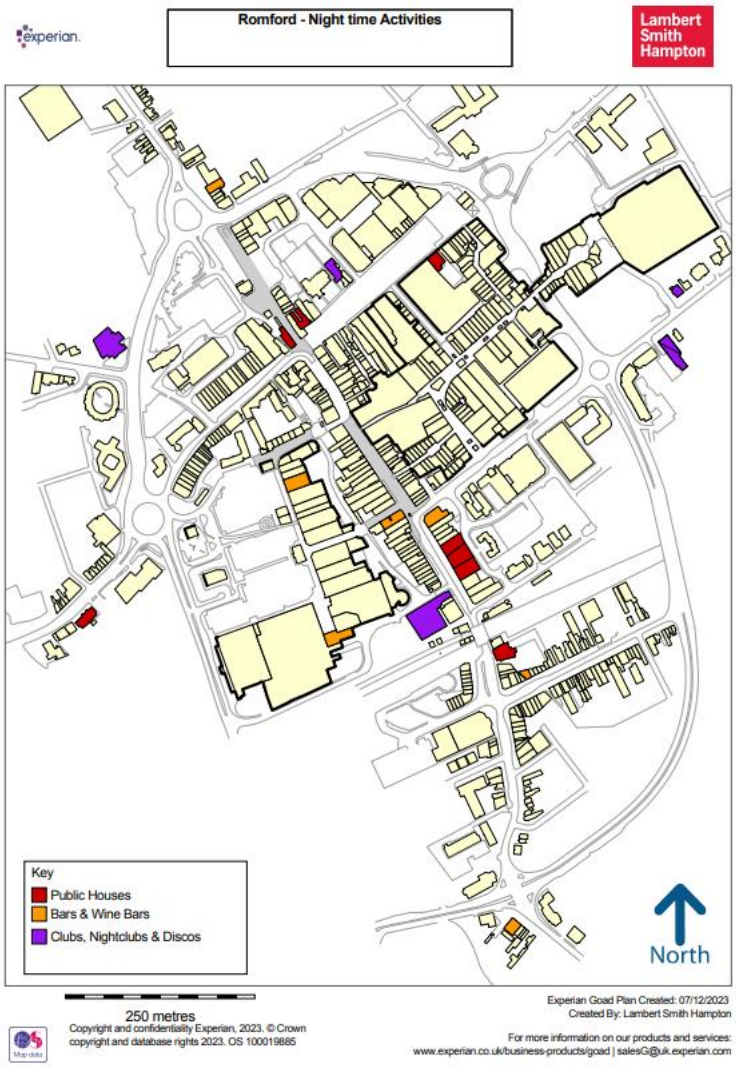
Romford is identified in the NT2 night-time economy classification in The London Plan, meaning the centre is of regional or sub-regional significance and the night-time economy is supported by good public transport links. Work to promote a vibrant but safe evening and night time economy has been on-going since at least 2012, and the development of a night time economy strategy that has been instrumental in the town attaining Beacon status.

The strategy comprises a number of strands, including a police plan, an alcohol harm reduction strategy, a tourism and culture strategy, a licensing policy, and a community safety plan. There is also a Public Space Protection Order in place across and beyond the town centre, prohibiting the

possession of any open containers of alcohol within the Alcohol Control Area (other than on licensed premises or in designated areas).

The provision for evening and night-time visitors is relatively good, with a choice of cinemas and a theatre in the centre. Later evening activities are also catered for in the form of two nightclubs and a third on the edge of the centre.

Figure 1.4: Night time Activity

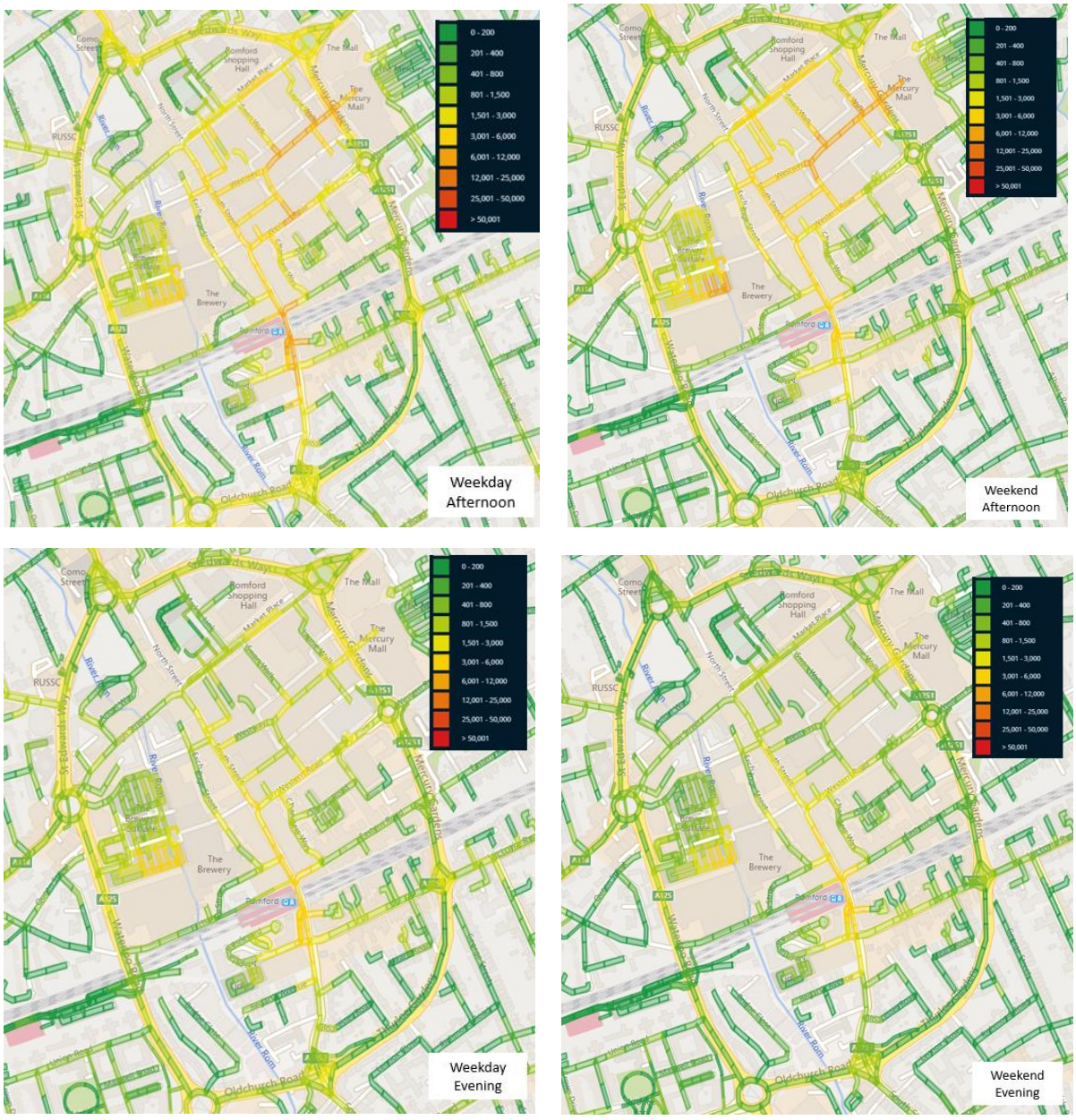


There is also a large number of F&B outlets in the centre, although the provision is stronger in terms of the fast food and takeaway offer, with is slightly below the national average, with wine bars, bars and public houses all under-represented. Restaurant provision is also slightly below average.

The centre also benefits from good public transport access from a wide area.

An analysis of footfall in the area shows that night time activity is concentrated along the southern part of South Street, between Western Road and the station. Activity is higher at weekends as would be expected, but remains relatively low. Footfall outside of the South Street area is also low.

Figure 1.5: Comparison of Footfall on Weekdays and Weekends by Time of Day



However, there have been some concerns that the current offer is very dependent on alcohol-related activities and a wider mix of evening activities would assist. Proposals to increase the family-orientated leisure offer are already being brought forward by the owners of the major shopping centres in Romford (for example The Brewery has plans to open axe throwing and crazy golf outlets) and there is potential to expand this type of offer further.

Vacancies

Experian Goad vacancy rates (July 2022) in the centre are close to the UK average; being slightly above average in terms of units but below in terms of floorspace. This suggests that vacant units tend to be smaller in Romford than elsewhere.

Many of the vacancies in Romford town centre over the past few years can be attributed to store closures by some key multiples, including BHS, Debenhams, Topman/Topshop and Aldi since the HRCLNA was prepared.

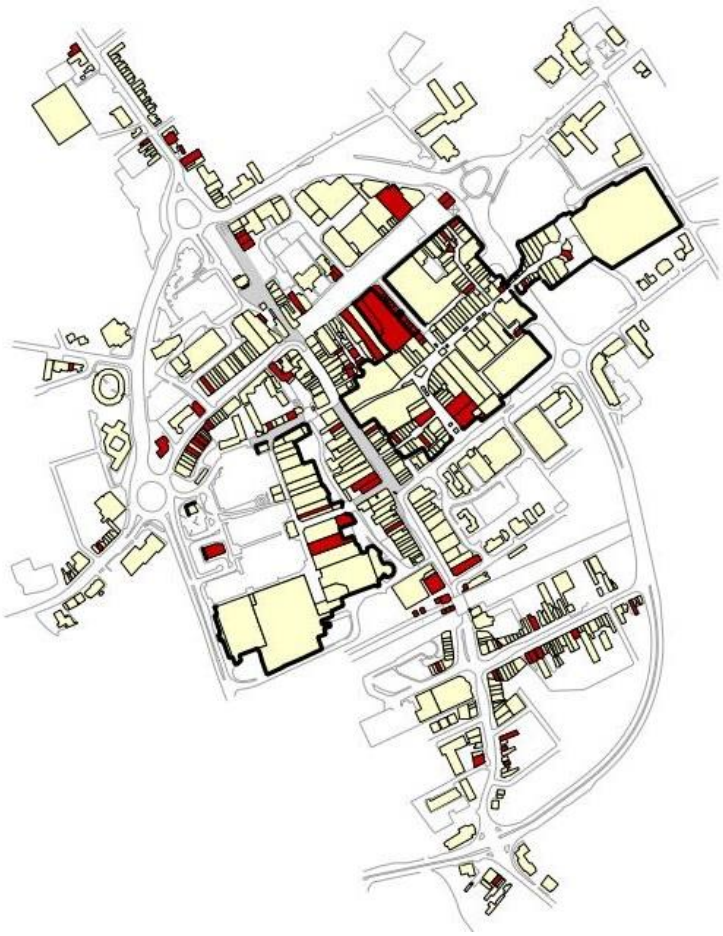
More recently Wetherspoons has also closed The World's Inn outlet. There have also been closures amongst independents.

Figure 1.6: Vacant Unit, Romford

Source: LSH Site Visit

The map below shows the distribution of vacancies is relatively dispersed throughout the centre. There is no obvious concentration or cluster of vacancies that could point to failing shopping streets and areas.

Figure 1.7: Experian Goad Vacancy Map, Romford



Source: Experian Goad

Vacancy data provided by the Council has been analysed to further understand the current vacancy situation in Romford. This data relates to a smaller and more concentrated area in the centre of the town and covers the period from January – March 2020 through to July – September 2023.

This data indicates that:

- For the period of July to September 2023, there were 43 vacancies in the area which represents a vacancy rate of 10.3%. This is lower than Goad due to the Goad survey area due to the extent of the area covered by Goad and the inclusion of more peripheral areas where retail vacancies could be expected to be higher;
- Since January - March 2020, vacancy rates have been relatively stable, with highs of 13.6% (October - December 2022) and lows of 9.7% (April – June 2023; and
- The latest vacancy rate is broadly in line with both the London average (9.5%) and the National (UK) average (10.9%).

Changes in Representation and Market Demand

Romford town centre's recent closures have included Aldi Local from Market Place and TSB Bank from The Liberty. Also, Wetherspoons (The World's Inn) has closed.

In terms of market demand, this appears to be relatively limited in terms of published requirements. However, local market intelligence suggests there is some interest, particularly from the leisure and F&B sectors.

Retailer Requirements

Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below. This lists all retailers who have indicated a requirement for Romford or the general area. As a result the list should not be interpreted as meaning all the companies listed would be interested in opening an outlet in Romford town centre. However, it does suggest a healthy level of interest from national multiples for both retail and F&B businesses.

Table 1.10: Retailer Requirements List, Romford

Name	Description
BIM's	Burger restaurant
Bodycare	Health & Beauty Supply Store
City Electrical Factors	Electrical wholesaler
Heavenly Desserts	Dessert parlour
Kwik Fit	Vehicle repair shop
Lok'nStore	Self-storage operator
M&S Food (London)	British multinational retailer
Marugame Udon	Japanese noodle bar
Menkind	Gifts & gadgets for men
Miller & Carter	Steakhouse & Grill
NAPA Center	Napa Centre are a paediatric rehab clinic
Ninja Warrior UK	Activity Park
Nisbets	Catering equipment and supplies.
Perseus	Care home operator
Ready Burger	Plant-based burgers
Shoezone	Shoe retailer
Swim!	Learn to Swim Programme
Tapi Carpets	Carpet retailer
Toolstation	Tools & building supplier
Vintage Inns	Country pubs & restaurants with accommodation
Zambrero	Healthy mexican inspired food

Source: The Requirements List September 2023

Independents do not publish their requirements in the same way and so are harder to identify.

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a

shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 1.11: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

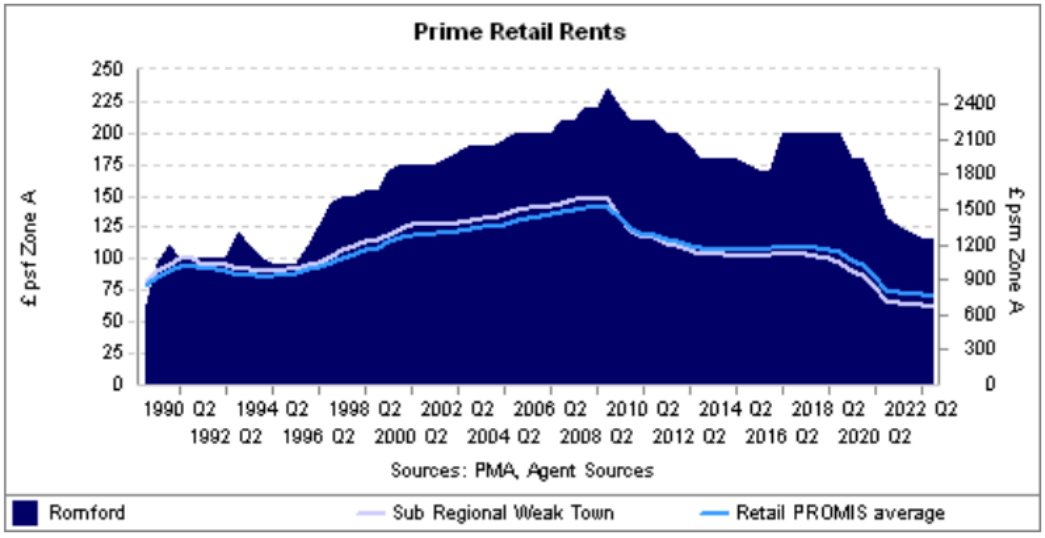
- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

This is consistent with information from PMA Promis[4] which indicates that top achievable prime rents in Romford were around £115 psf Zone A at end 2022. This reflects a a cumulative decline in prime rents since the end of 2017 of -42.5%, which is a higher fall than the PROMIS average rate of decline of -35.9%.

However, rents continue to be above the average for comparable centres, namely 200 centres classified as 'Sub Regional Weak Town' by PMA:

[4] In-house data from Property Market Analysis (PMA) Retail Report for Romford

Figure 1.8: PMA Promis Prime Retail Rents, Romford



Source: PMA PROMIS

Accessibility

Public Transport:

Romford town centre is served well by public transport, and the train station is centrally located within the town centre. There are frequent Greater Anglia trains to central London to the west and Shenfield to the east, with some direct trains also heading east to Colchester and Southend Victoria. The station is also on the route of Crossrail, now known as the Elizabeth Line, which opened in May 2022. Romford is also accessible directly from Heathrow Airport with Elizabeth Line trains offering a direct connection every 30 minutes. The London Overground provides a connection to Upminster where District Line and Essex Thameside services can be accessed.

Information from TfL indicates that weekly entries and exits at Romford station are currently around 180k per week, a significant increase on the 160k per week seen in 2019. This reflects the opening of the Elizabeth line and introduction of 'Through Running' i.e., direct trains. Tuesday, Wednesday and Thursday are usually busiest at Romford, with Sunday being the quietest day.

To the south of the station there is a bus interchange providing connectivity both into neighbouring boroughs as well as into central London and Essex.

Figure 1.9: Romford Station

Source: LSH Site Visit

Car Accessibility:

Romford benefits from good accessibility by private car, with the A125 and A1251forming much of the town centre boundary. This allows easy access to the numerous car parks that serve the town centre. These provide in excess of 4,500 spaces, mainly towards the centre and north of the town centre, reflecting the location of shopping centres which all provide parking. The majority of spaces are provided in the public and private multi-storey car parks but there is a limited amount of surface parking available to the south of the station and to the north, although much of the latter is located outside of the town centre, or in Market Place and therefore is not always available.

Car parking charges apply in most locations.

The amount of parking provided for the centre is in excess of what is now required and the Council has recently consulted on the disposal of two car parks in the north of the centre for residential development (Angel Way and Como Street). The owners of the shopping centres are also indicating surplus parking capacity and plans to redevelop existing car parks or parts of them for other land uses is expected.

Pedestrian Accessibility:

Pedestrian accessibility throughout the town centre is generally good, reflecting the number of purpose-built shopping centres and pedestrianised areas provided within the centre.

Pedestrian accessibility in and out of the town centre however can be challenging. The Romford Ring Road currently creates a barrier around the edge of the centre and can be difficult to navigate. The Council is looking to address this in the coming years as part of Romford's Liveable Neighbourhoods scheme.

In parts of the centre there are restrictions on through traffic. South Street provides a good pedestrian link from the station to the pedestrianised area from Western Road northwards towards Market Place, with widened pavements prioritising pedestrians over public transport and access only traffic.

There is more car access and parking to the north of the centre around Market Place, but pedestrian access is still prioritised.

Cycle Accessibility:

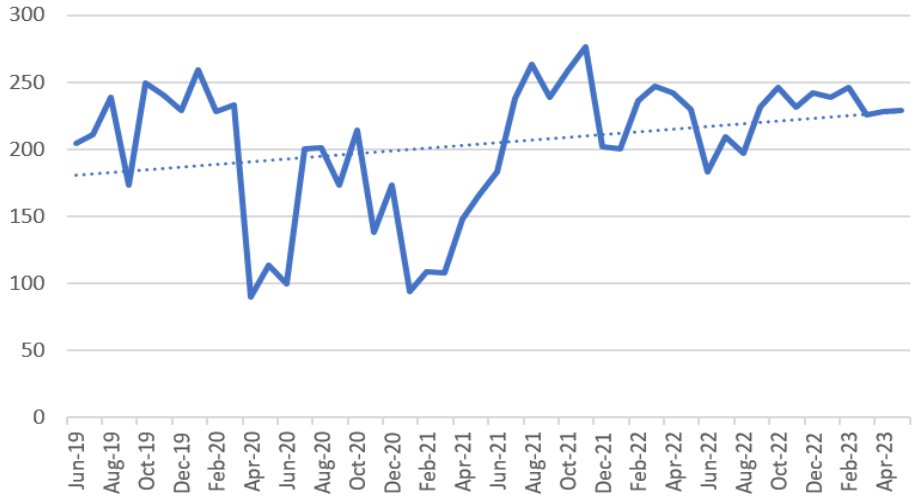
Romford Town Centre benefits from access from a number of cycle routes and cycle parking is provided in a number of locations close to the station, The Brewery, Liberty and Mercury shopping centres, as well as in a few locations close to South Street.

Perception of Safety and Occurrence of Crime

Based on a central postcode for Romford Town Centre we are able to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below shows the total crime rate varies month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, crime rates have steadily grown over this time, with obvious lows during the periods of the most restrictive lockdown rules. The peak month of November 2021 saw 276 crimes recorded.

Figure 1.10: Total Crime Incidences, Romford, June 2019 – May 2023



Source: UKCrimeStats

The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, a concentration of crimes has occurred in the vicinity of the Liberty Shopping Centre. The main types of crime relate to violence and sexual offences, anti-social behaviour and shoplifting.

Figure 1.11: Crime Heat Map, Romford

Source: UKCrimeStats

Environmental Quality

Romford town centre has benefitted from investment in the public realm along South Street, with vehicle movements restricted and pedestrians prioritised through footpath widening, improving access to the fully pedestrianised areas.

The development of the centre over a considerable period of time is reflected in the range of building styles and footprints now seen, and the historic Market Place/High Street area benefits from Conservation Area status.

This area also includes the town centre's only listed buildings and open space, in the form of St Edwards Churchyard.

The environment in the southern part of the town centre is more dominated by traffic, reflecting the location of the station and public transport interchange but north of the station tree planting improves the appearance of the public realm.

The River Rom runs down the western side of the town centre, but is largely overgrown, inaccessible and built over within the town centre boundary.

Investment Plans and Development Opportunities

Romford town centre is located within the Romford Strategic Development Area, an Opportunity Area defined in the London Plan.

Work on a Masterplan for Romford has been on-going in recent years and demonstrates stakeholder interest in bringing forward new investment and development plans.

From the work to date and discussions with key landowners in the area, it is evident that:

- The new owners of The Brewery have made some initial investments in improvements to the landscaping of the site and the public realm but have longer term plans to transform the site into a mixed use scheme including both commercial and residential uses;
- The owners of The Mercury Centre suggest it is likely to be repurposed, potentially for residential development; and
- The new owners of The Liberty Centre consider that it is currently over-reliant on retail. It would benefit from a reduction in its total size and the introduction of a greater variety of uses such as services, food retail, F&B, residential and civic uses in the medium term. Introduction of family dining and experience-led bars are proposed in the former Littlewoods unit and in the longer term residential development is likely to be proposed at upper levels.

Barriers to Business

The current economic climate and cost-of-living is likely to provide the main barrier to new businesses setting up in Romford. The centre otherwise offers many benefits to existing and new businesses, including good public transport access, sufficient vacancies in a range of sizes and locations, and high levels of footfall.

Rental levels are higher than in some comparable centres but are lower than more central London locations.

Stakeholder Feedback

Stakeholder engagement has been undertaken with a number of landowners and other interested bodies in Romford. We have also referred to relevant information from public consultation undertaken for the Council[5]. This provides the following insights:

The Liberty Centre (Rivington Hawk)

- Centre acquired by new owners in 2022.
- It is a destination location for the surrounding population and so has not been affected by the WfH trend.
- Romford has demonstrated strong resilience to competitor from Stratford and Lakeside.

[5] Havering Characterisation Engagement, Stage 1

- There is strong demand and high occupancy within the main mall but peripheral parts have become unlettable demonstrating the centre has too much retail floorspace and units are poorly formatted. Larger format units (former BHS and Littlewoods units) and Laurie Walk are not attracting new tenants and will require comprehensive redevelopment.
- M&S is a key tenant for the town centre, but there is an upcoming lease expiry / break.
- Physical retail must co-exist with online and compete by offering good experiences and mix of attractions. Main issue is not this or competition from out of centre retailing but retailers pulling out of smaller sized centres.
- The Liberty is currently over-reliant on retail. It would benefit from a reduction in its total size and the introduction of a greater variety of uses eg services, food retail, F&B, residential and civic uses in the medium term.
- Reliance on retail means the centre closes at 6.00pm due to lack of footfall.

The Brewery (Schroders)

- Schroders acquired the centre in 2022.
- The Brewery provides a hybrid offer providing a retail park, supermarket and leisure destination in a city centre location.
- The transport links to the centre are a key draw for tenants.
- Level of demand for previously vacant space is good within the centre but some other areas are struggling with a lack of demand.
- Demand from F&B is strong and it is an important part of the offer and a new competitive socialised venue (Bunkers) is to be provided. However, the convenience offer has been vital during the pandemic period.
- The Covid pandemic has seen a shift to mission-based shopping, which has particularly benefitted out of centre shopping.
- The Liberty Centre provides the main competition to The Brewery.
- Romford has a big night time economy and The Brewery is a major contributor to this, with a focus on a family-friendly leisure offer.
- There are investment plans for the centre:
    - First phase is investment in replacement cladding, improved lighting, more green areas and greater efforts on sustainability;
    - Second phase will be large-scale regeneration, but this is complex and at an early stage.
- Would like to see greater massing and height permitted within the development. This may allow development and wider improvements, such as to the public realm. There are plans to open up the River Rom which currently runs in a culvert parallel to The Brewery frontages.
- Future redevelopment could include residential development.
- Development Brief being prepared by the Council.

The Mercury Centre (Ellandi)

- Centre provides a predominantly retail offer.
- It has complex lease structures which stagnates growth.
- The centre is a catalyst for footfall within the town centre, with the majority of visitors visiting the other centres.
- Asda attracts more frequent visits than Sainsbury's at The Brewery, although the latter achieves higher levels of footfall.

Feedback from Confidential Stakeholder Engagement on emerging Romford Masterplan

- Need for public realm interventions, especially in the Market Place
- Opportunities to improve green infrastructure and improve access to the River Rom
- Potential to support sustainable travel and increase draw as a result of the opening of the Elizabeth Line (Crossrail) and other initiatives

Other Comments (BIDS)

Other comments of relevance to Romford town centre:

- Town centre is doing better than some of the others in the area.
- It is well occupied and bustling.
- Centre does lose out to larger centres elsewhere eg Westfield.
- Opening of the Elizabeth Line has been key (but this also makes it easier for residents to go elsewhere).
- Will also benefit from significant housing growth.
- Centre fared well during Covid and continues to benefit from people living locally and commuting less to Central London for work.
- Vacancy levels are relatively limited
- The Brewery is doing quite well and is attracting large F&B companies to Romford
- The Market is a unique part of Romford, being over 700 years old
- Non-retail uses are being attracted to Romford. There are already a number of gyms etc and The Liberty is trying to attract more hospitality.
- The Brewery has plans to open axe throwing and crazy golf and provide more hospitality/leisure uses
- Night-time economy could be improved, although Atik nightclub is popular
- Owners of The Liberty and The Brewery both keen to invest, but Mercury shopping centre may be sold
- Need to introduce more trees and green space. Opportunities to reduce car parking to provide this is being considered by some landowners
- Considerable investment has been made for 'London in Bloom' and Romford is now a finalist
- Massive challenge to keep Romford safe and secure
- Cleanliness of the centre could be improved but private 'enforcers' have faced a backlash
- Centre would benefit from improved signage and wayfinding
- Expect to see increased residential development in the centre in next 5-10 years and attract more young professionals
- Need to balance more residential uses with retention of sufficient retail and other uses.
- Need to improve the night-time economy.
- Not seen much effect of the changes to PD rights with very little retail floorspace lost.
- The town centre is currently split into three and requires consolidation. The isolated nature of The Brewery stops people going into the town centre.
- Lack of an office market is a concern and there is potential to increase office employment and residential to extend the operational hours of the centre.

Public consultation[6] has also provided the following public feedback:

- Positives:
  - Romford has a lot to offer in terms of retail, convenience, entertainment and transport links.
  - Romford has a lot of takeaways which people generally enjoy.
  - The cobbled streets, trees and heritage assets are well valued in Romford and add to its unique character.
  - The Victorian pubs are an important part of Romford's character.
  - Romford's historic legacy surrounding the market is something that the local population feel proud of it.
- Issues:
  - The town centre has deteriorated generally in the last couple of decades, more so than anywhere else in the borough. Centres such as Hornchurch and Elm Park are generally preferred.
  - There was a sense that "everything has gone" from the centre with vacant units, reduced variety of shops, and a loss of stalls and vibrancy at the market.
  - Residents expressed that they think Romford needs a 'general tidy up'.

[6] Havering Characterisation Engagement, Stage 1

  - Residents are concerned that the historic buildings and heritage assets are being eroded and lost.
  - Anti-social behaviour and knife crime has become an issue in Romford,
  - The ring road and its associated traffic provides a poor environment for the town centre which discourages residents from using active travel modes.
- Romford is busy, it has a great sense of activity with lots of people. It is famous for night-life
- and entertainment.
- There is a desire for a visitor information point in Romford for history and social information.
- There is a general fear around safety, especially for children considering recent knife crime.

SWOT Analysis

Strengths

- Large centre with wide catchment and good draw currently
- Historic core around Market Place, providing one of the largest market areas /civic spaces in London
- Good range of modern shopping centres and facilities
- Active Romford BID organising events to drive footfall etc
- Good public transport provision and centrally located station
- Opening of Elizabeth Line has boosted footfall and investment
- Varied town centre offer
- Footfall levels have grown significantly in recent years

Weaknesses

- Poor safety/security or concerns regarding safety, making people less likely to visit. Could be particularly challenging when seeking to expand the night-time economy
- Lack of cleanliness which can put investors off
- Lack of green space/ places to sit
- Poor connectivity and wayfinding between different parts of the town centre especially The Brewery

Opportunities

- On-going WFH trend which could increase use of Romford by local residents
- Availability of space for flexible uses such as incubator space, or shared facilities for those WFH
- Operator interest from various leisure/entertainment businesses such as crazy golf, axe throwing etc.
- Increased residential population
- Much of the centre is under the control of a small number of landowners and they are wanting to invest and diversify the town centre offer
- Replacement of surplus parking or other land uses with tree planting and public/green spaces
- Redevelopment of former Debenhams unit
- Development opportunities which open up the River Rom at The Brewery
- Expansion of the leisure and evening activities, with a family-orientated focus
- Size of centre allows areas to develop individual identities and offers
- Use Romford's position at the interface between Essex and London and new Elizabeth Line services to attract new business occupiers to the town centre

Threats

- On-going retail closures, with loss of Debenhams and other national multiples
- Competition from stronger retail centres such as Westfield Stratford and Lakeside and Central London, which is also a major leisure draw

- Un-coordinated redevelopment of the existing shopping centres could lead to loss of footfall and overall offer / draw
- Safety concerns

Conclusions

As a 'Metropolitan Centre' Romford has, and would be expected to have, an extensive and varied retail and non-retail offer, serving an extensive catchment.

Although it is facing the same challenges as the rest of the UK, it seems to have benefitted from the 'working from home' (WFH) trend, which with more people staying local to home than it has lost from reduced commuter/works inflows. The centre has also benefitted from the opening of the Elizabeth Line.

The previous weakness of lack of green space and planting is being addressed in the short-term and longer-term reducing use of the private car could open up opportunities for more greening and public spaces.

Going forward, addressing crime and safety concerns will be important. The '*My Local Bobby'* initiative is a good starting point, but it can take a long time to change perceptions.

It will also be important to ensure that the benefits of an increased resident population are not diluted by inappropriate development that harms the offer or attractiveness of the retail and other town centre uses.

Emerging plans from the key centre owners suggest there is an oversupply of retail floorspace and car parking at present and there is a need to consolidate the retail offer. This is likely to be centred on The Liberty Centre in the future, but with a greater mix of other uses supporting it. Mixed uses including leisure is being proposed at The Brewery and residential development at The Mercury.

There is potential to build on the existing night time economy offer.

Collier Row

Description

Collier Row is located in the north west of the borough and serves a distinct residential area to the north of the A12.

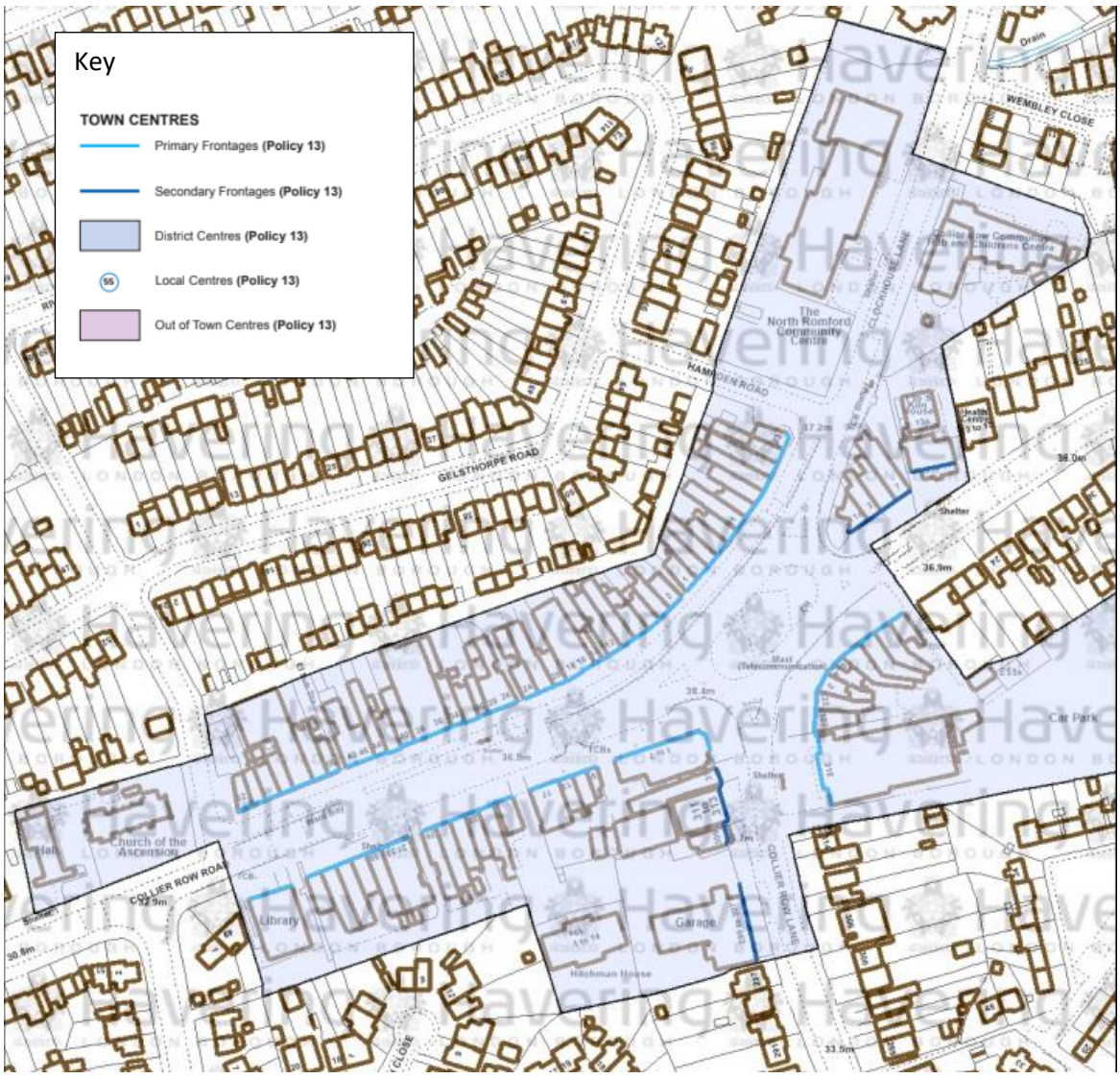
The centre is a traditional linear centre, concentrated around the junction of the B174 and B1459 and consists of approximately 80 commercial units.

It is anchored by a Tesco supermarket and a small number of national multiples, although banking & financial provision is limited.

Current Designation:

Collier Row is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second tier centre in the London Borough of Havering.

Figure 2.1: Collier Row Town Centre



Source: Havering Local plan Policies Map

Current Planning Policies / Designations:

- Collier Row is seen as having low potential for commercial growth and potential for incremental residential growth in The London Plan.

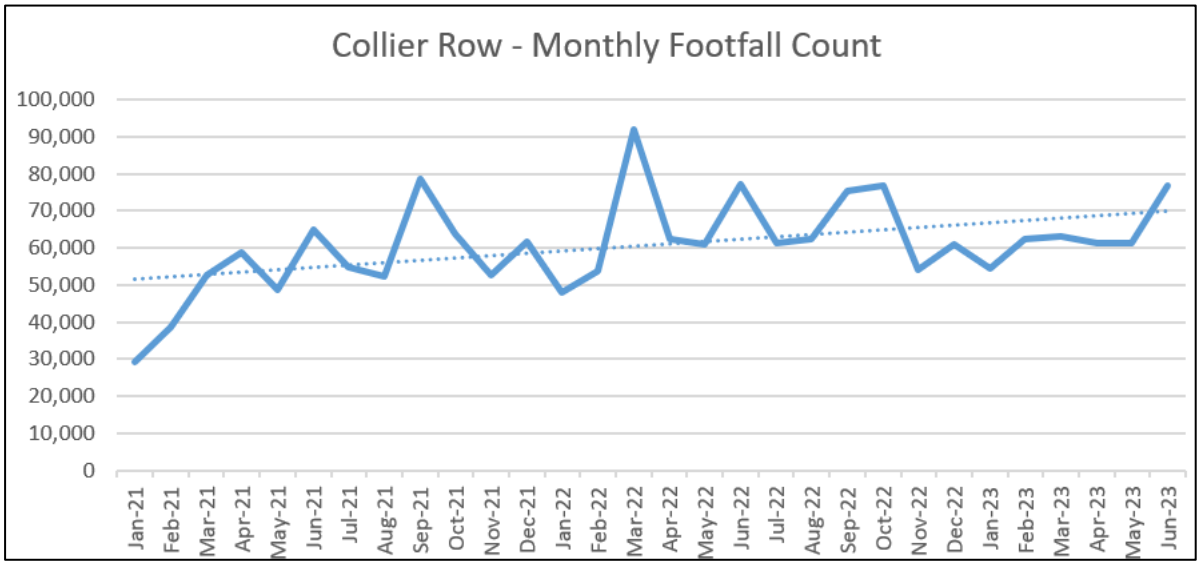
Footfall:

The Council have provided two sets of footfall data. The first sets out a pre- and post- pandemic (2019 vs 2022) comparison whilst the second outlines monthly footfall figures from January 2021 through to June 2023.

The 2019 vs 2022 pre- and post-pandemic data shows that footfall levels were 3.9% lower in 2022 than 2019. This is a marginal decrease when compared to the change seen across Greater London (-17.6%).

The monthly footfall data (January 2021 – June 2023) can be seen in the graph below. From a low of 29,000 in January 2021, footfall has grown as pandemic-related restrictions have eased and subsequently been removed. March 2022 saw the peak for this period with a footfall count of 92,000. The trendline shows that footfall has been steadily growing over this period.

Figure 2.2: Collier Row – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Collier Row is located in Zone 7 of the Study Area (its 'home zone') but is also close to Zone 1 (Romford). As a result, it draws most of its visitors from the home zone but with some inflows from Zone 1.

Those who do visit the centre tend to do so on a frequent basis, but there is a relatively high proportion of Zone 7 respondents who never visit. This reflects the extent of Zone 7 which extends northwards beyond Collier Row to include areas in Essex and the draw of Romford town centre.

Table 2.1: Frequency of Visits to Collier Row (Cumulative)

Frequency of Visit to Collier Row District Centre (Q28)	% Respondents
Daily	11%
4-6 days a week	9%
2-3 days a week	18%
One day a week	19%
At least once a week	57%
Every two weeks	8%
Monthly	7%
At least once a month	72%
Once every two months	0%
Three-four times a year	0%
Once a year	0%
Less often	0%
Never / don't Know / Varies	28%
Total	100%

Source: Household Survey, Q28

Use of Centre:

The main reason for visiting Collier Row is shopping (77% of respondents using the centre), with nearly half of all respondents referring to food shopping. Non-food shopping is limited, reflecting the retail offer but the importance of retail services for a minority of respondents is clear.

Table 2.2: Main Reason for Visiting Collier Row

Main Reason for Visiting Collier Row District Centre (Q29)	% of Respondents using the Centre
Food shopping	44.4%
Shopping in general	22.9%
Non-food shopping	10.4%
Visiting personal services e.g. hair salon, barber, beauty salon etc	7.3%
Visit cafés, restaurants, and takeaways	3.5%
Visit bars / pubs	1.7%
For a walk	0.5%
Day out / for a change	0.5%
Visit sports and fitness venues	0.3%
(Don't know)	8.6%

Source: Household Survey, Q29

Customer Views:

Visitors to Collier Row centre particularly value its close proximity to their home. Other likes are limited to minority responses.

Table 2.3: Main Likes about Collier Row

Main Likes about Collier Row District Centre (Q30)	% of Respondents using the Centre
Close to home	32.4%
Good range of non-food shops	3.9%
Good pubs, cafés or restaurants	2.8%
Free parking	2.6%
Quiet	2.4%
Clean streets	2.4%
Compact	1.8%
Good food stores	1.4%
Good facilities	1.0%
Easy to get to by bus	0.7%
(Don't know)	45.6%
(Nothing)	11.5%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- The centre caters for the day to day needs of local residents, with provision geared towards convenience goods, hot food and some services;
- The offering is generally towards the lower end of the market, especially when the provision of hot food takeaways is taken into consideration;
- The majority of outlets are independently owned. National multiples include Tesco Metro, Costcutter, Londis, Boots, Lloyds Pharmacy, Lloyds Bank, Post Office, Greggs, Coral, Wetherspoons, Domino's Pizza and Pizza Hut;
- There are 11 vacancies in the centre equivalent to 15% of all units (UK average 12.5%);
- Pedestrian flows were generally good, aided by the linear nature of the centre;
- The centre is generally accessible being served by 6 [bus] routes;
- Environmental quality is generally good and the Council has invested in up-grading the public realm which adds to its attractiveness.

At that time the diversity of uses was as follows:

Table 2.4: Collier Row Diversity of Uses (Units), 2015

	No. of Units	% of total	% UK average	% Difference to UK average
Convenience	8	11.4	9.0	2.4
Comparison	17	24.2	40.5	-16.3
Service and Miscellaneous	36	51.4	36.9	14.5
Vacant	9	12.9	12.5	0.4

Table 2.5: Collier Row Diversity of Uses (Floorspace), 2015

	Gross Floorspace (m^2)	% of total	% UK average	% Difference to UK average
Convenience	2,180	22.2	18.1	4.1
Comparison	2,700	27.6	45.6	-18.0
Service and Miscellaneous	3,850	39.3	24.8	14.5
Vacant	1,070	10.9	10.5	0.4

Source: HRCLNA, Tables 3.3 & 3.4

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[7] within the town centre:

Table 2.6 Collier Row Diversity of Uses, 2018

	Collier Row Town Centre		Collier Row Primary Frontage		Collier Row Secondary Frontage	
Total Units	**78**	**100%**	**68**	**100%**	**10**	**100%**
A1	40	51%	36	53%	4	40%
A2	9	12%	9	13%	0	0%
A3	8	10%	6	9%	2	20%
A4	1	1%	1	1%	0	0%
A5	8	10%	6	9%	2	20%
Sui Generis (Other)	5	6%	3	4%	2	20%
Sui Generis (Betting Shops)	3	4%	3	4%	0	0%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	1	1%	1	1%	0	0%
D2	1	1%	1	1%	0	0%
B1	0	0%	0	0%	0	0%
Vacant	2	3%	2	3%	0	0%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses (July 2022)

The Experian Goad Plan for Collier Row covers a similar area to the defined district centre, although it does not extend quite as far north along Clockhouse Lane. It therefore does not include the North Romford Community Centre or Day Nursey opposite. Otherwise, survey results on diversity of uses and vacancies would be expected to be similar.

A summary of the centre offer in July 2022 shows a below average comparison offer and above average leisure services provision:

[7] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Table 2.7: Experian Goad Diversity of Uses, Collier Row

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Collier Row	UK Average		Collier Row	UK Average
Comparison Retail	14	18.7%	26.9%	2,852	25.6%	30.1%
Convenience Retail	6	8.0%	9.3%	1,561	14.0%	15.5%
Retail Services	17	22.7%	15.8%	1,505	13.5%	7.2%
Leisure Services	23	30.7%	25.5%	3,493	31.4%	26.4%
Financial & Business Service	6	8.0%	8.7%	836	7.5%	6.5%
Vacant	9	12.0%	13.8%	883	7.9%	13.7%
Total	75	100.0%	100.0%	11,130	100.0%	100.0%

Source: Experian Goad, July 2022

This is confirmed by the Council's 2022 Town Centre health checks which note the dominance of leisure and service offers and the continued growth of the former. This has been a consistent pattern since before the Covid-19 pandemic.

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Experian Goad identified 19 national multiples (defined as being part of a network of nine or more outlets) within Collier Row at the time of their most recent survey (July 2022). The findings indicate a below average proportion of national multiples in all categories except Leisure Services. National multiples in the Financial & Business services sector are particularly low.

National multiples in Collier Row include Tesco, Costa Coffee, KFC, Greggs, Savers and Boots Pharmacy. These national brands act as key draws for visits to the centre.

The Council's 2022 health check for the centre confirms that national multiple representation has been consistent over recent years.

Food & Beverage Provision

The F&B offer in Collier Row is slightly above the UK average in terms of the number of units, but this reflects a very high proportion of Fast Food & Takeaway units. Licenced premises in the form of public houses and bars & wine bars are below average.

Table 2.8: Food & Beverage Provision Breakdown, Collier Row

Type of Use	Number	% All Town Centre Outlets	% UK Outlets
Bars & Wine Bars	0	0.0%	2.3%
Cafes	5	6.7%	5.0%
Fast Food & Takeaways	9	12.0%	6.1%
Public Houses	1	1.3%	2.6%
Restaurants	4	5.3%	4.9%
Total	19	25.3%	20.9%

Source: Experian Goad, July 2022

Other Key Town Centre Uses

A successful town centre will provide a range of services and facilities in addition to its retail offer. In Collier Row these are relatively limited, even given the district centre status. The centre does benefit from a library and Post Office, but there are no other financial or business services represented.

Local facilities in the form of the North Romford Community Centre are located on Clockhouse Lane.

Conclusions on Diversity of Uses:

The retail, service and leisure offer provided in Collier Row is similar to what would be expected in a smaller district centre, serving a defined residential area, with reliance on a few anchor national multiples and a varied independent sector. The comparison offer is relatively limited but the centre has a high proportion of Fast Food & Takeaway outlets.

The offer does not appear to have changed significantly since 2019.

Evening / Night time economy

The evening and night time economy in Collier Row is limited to one public house and a number of Fast Food & Takeaway units. Given the proximity of Romford, less than 2 miles to the south, this is not unexpected.

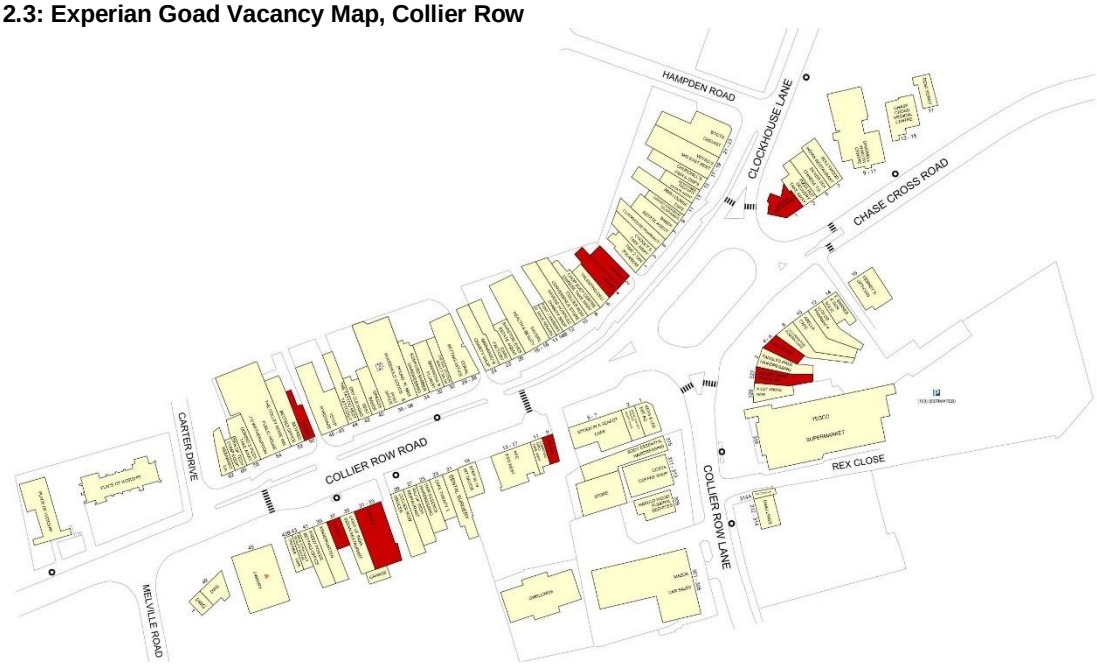
Vacancies

Experian Goad vacancy rates (July 2022) in the centre are close to the UK average in terms of the proportion of units that are not occupied, but vacant floorspace is considerably below the average, suggesting the vacant units are generally smaller than seen elsewhere.

Vacancy rates now appear to be a noticeable increase on the position in 2018 but Council data suggests that the number of vacancies is similar to that recorded in 2019. Rates subsequently fell in 2020 and 2021 but rose to current levels in Q4 of 2022. This is likely to reflect the economic challenges facing businesses at the present time.

Vacancies are dispersed throughout the centre and there is no obvious cluster that could point to failing part of the centre.

Figure 2.3: Experian Goad Vacancy Map, Collier Row



Source: Experian Goad

Vacancy data provided by the Council has been analysed to further understand the current vacancy situation in Collier Row. The area that this data covers is similar to that of Goad. The data accounts for the period of January – March 2020 through to July – September 2023.

The data can be summarised as follows:

- For the period of July to September 2023, there were 7 vacancies in the area which represents a vacancy rate of 9%.
- Since January - March 2020, the vacancy rate for Collier Row has risen from 5.1% (4 vacant units). The lowest rate came in April – June 2021 (3.8%). The most recent rate of 9% is the joint highest seen during this time.
- The latest vacancy rate is similar to that of the London average (9.5%) and lower than the National (UK) average of 10.9%.

Changes in Representation and Market Demand

Council data indicates that there have been changes to both national multiple and independent representation in the centre in the last 3 years, but that the overall mix has not changed significantly.

Market demand for representation in the area is recorded for Iceland and Lidl, although the latter is a more general requirement for North East London[8]. Requirements from independents are not normally publicly available.

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

[8] The Requirements List September 2023

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 2.9: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

Accessibility

Public Transport:

With the Central line approximately 3 miles to the west and the Romford train station almost 2 miles to the south of Collier Row, bus services provide the most accessible and convenient form of public transport. Buses run frequently and connect to areas such as Noak Hill, Elm Park, Hornchurch, Barkingside and Romford. Services to Barkingside and Romford give access to rail services into Central London.

Car Accessibility:

Rex Close is the main car park for those visiting Collier Row by car. It is located to the rear of the Tesco and can be accessed via Rex Close. There are over 100 parking spaces and there is a charge for stays lasting over 30 minutes. On-street parking can be found along Collier Row Road and Clockhouse Lane with pay and display machines available.

Pedestrian Accessibility:

Pedestrian access and safety within the centre is good with wide pavements found on both sides of Collier Row Road. There are multiple traffic light stops with tactile paving and dropped kerbs to provide aid to those with disabilities or pushchairs, as well as zebra crossings to support with navigating the roundabout junction. Whilst Clockhouse Lane running parallel to Collier Row Road adds some challenge to pedestrian accessibility (meaning that there are three lanes of traffic to cross in parts), there are pedestrian islands between to assist.

Cycle Accessibility:

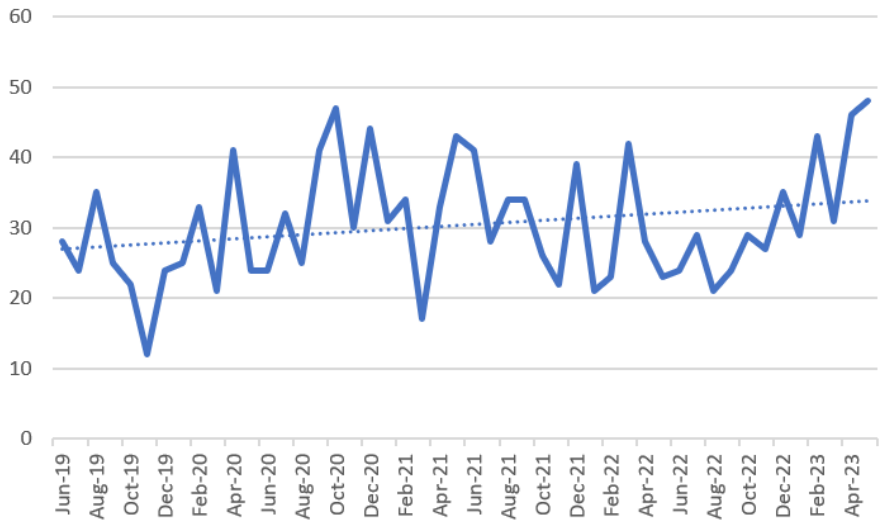
Cycle parking is readily available along the Collier Row Shopping Parade including Collier Row Road and Clockhouse Lane.

Perception of Safety and Occurrence of Crime

A central postcode within Collier Row was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, crime rates have been rising slightly during this time, with the latest recorded month of May representing a peak with 48 crimes recorded in this month.

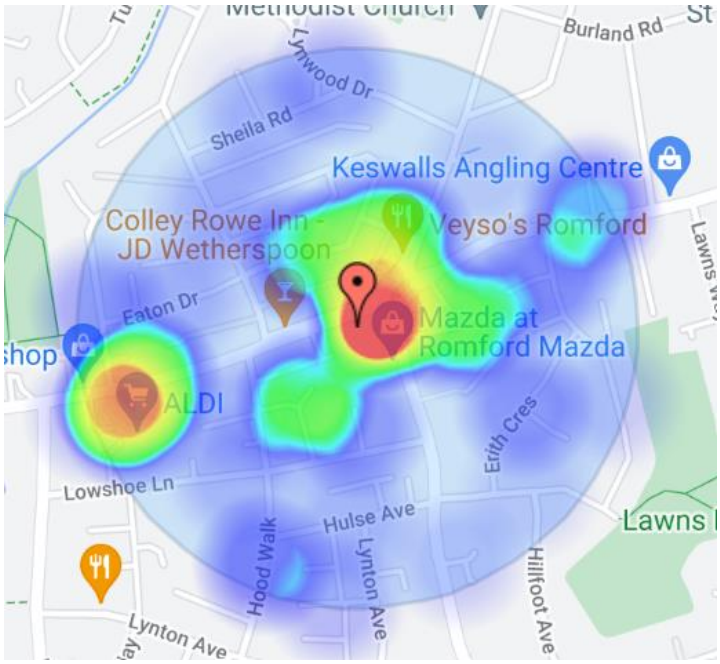
Figure 2.4: Total Crime Incidences, Collier Row, June 2019 – May 2023



Source: UKCrimeStats

The Figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, crime is a little more spread than with other centres, however, the clear hotspots come from the west near to the Aldi and centrally, close by to the Tesco Superstore. The main types of crime relate to violence and Sexual Offences, anti-social behaviour and shoplifting.

Figure 2.5: Crime Heat Map, Collier Row



Source: UKCrimeStats

Environmental Quality

The environmental quality of Collier Row District Centre is fair, with a decent amount of street furniture and examples of greenery dotted around.

Whilst the buildings are dated, they do not look to be in any sort of disrepair or ruin. Characterful lamp posts line both sides of the roads, making the area safer in the evenings and early mornings. Trees of varying sizes can sporadically be found, however, hanging baskets which were previously in place are no longer present in the centre.

Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches can be found in a couple of locations, although with the width of the pavements in parts, there could potentially be an improved provision.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Collier Row at the present time.

Barriers to Business

The current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in Collier Row.

There are a number of vacant properties in the centre that could be re-occupied but the catchment for the centre is relatively localised and therefore would be most likely to attract businesses aimed at the local market.

Stakeholder Feedback

Public consultation[9] has also provided the following public feedback:

- Positives:

[9] Havering Characterisation Engagement, Stage 1

- Those living to the north of Romford in Collier Row felt that they had the best of both worlds with access to green space and nature whilst being close to the thriving district centre.

- Issues
  - Collier Row residents were promised a railway that never came so residents are reliant on cars
  - There is a general fear around safety, especially for children considering recent knife crime.

SWOT Analysis

Strengths

- Relatively compact linear centre that is easy to navigate
- Clearly defined catchment
- Good levels of usage by local residents
- Strong convenience anchor
- Library and Community Centre provide additional draw

Weaknesses

- Lack of rail / underground transport links
- Limited financial services in the form of banks
- Limited development opportunities

Opportunities

- Improved offer to encourage evening economy

Threats

- Competition from Romford town centre, especially in terms of the evening economy

Conclusions

Collier Row is a typical and traditional district centre that primarily exists to serve the needs of its local population. Inflows of expenditure from the wider area will always be limited given the proximity of Romford town centre, which in turn will limit investment interest. The centre therefore depends on a small number of national multiples to anchor the centre and the wider independent offer.

The strength of the centre over the Covid-19 period suggests it is functioning well and meeting local needs.

ELM PARK

Description

Elm Park is located in the south western part of the borough and serves a residential area located between Hornchurch, Rainham and Dagenham. The retail offer is focussed along The Broadway.

Elm Park District centre comprises of two distinct areas separated by the railway line and station.

The northern part is the larger of the two and includes the east-west areas along Elm Park Avenue. This area includes the main convenience offer.

The area to the south comprises the Station and Tadworth Parades. These form part of the primary frontage but are separated from each other by The Broadway and the parking areas associated with each of the parades.

Current Designation:

Elm Park is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second tier centre in the London Borough of Havering.

Figure 3.1: Elm Park Town Centre

Source: Havering Local Plan Policies Map

Current Planning Policies / Designations:

- Elm Park is identified as having low potential for commercial growth potential and medium potential for residential growth in The London Plan.

- Elm Park Parades (Policy SSA 3 of the Local Plan) seeks the redevelopment of the Station and Tadworth Parades, requiring the retention of retail floorspace at ground floor level.

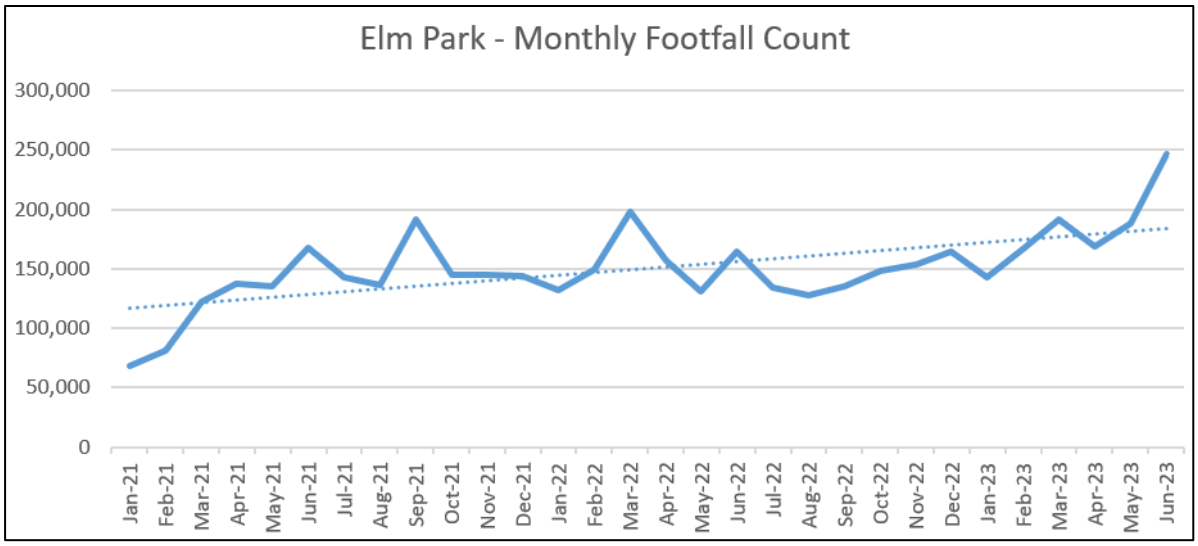
Footfall:

The Council have provided two sets of footfall data. The first sets out a pre- and post- pandemic (2019 vs 2022) comparison whilst the second outlines monthly footfall figures from January 2021 through to June 2023.

The 2019 vs 2022 pre- and post-pandemic data shows that footfall levels were 31.4% lower in 2022 than 2019. This indicates that the pandemic has had a severe impact on pedestrian activity in the area – even more so than Greater London where a change of -17.6% was recorded.

The monthly footfall data (January 2021 – June 2023) can be seen in the graph below. Pedestrian activity has grown significantly during this time, with a low of 69,000 in January 2021 and a high of 247,000 in June 2023.

Figure 3.2: Elm Park – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Elm Park District Centre is located in Zone 4 of the Study Area (its 'home zone') but its central location within the Study Area means it also serves people living in Zones 2 (Hornchurch), 9 (Dagenham) and 10 (Rainham). Respondents indicating the centre is their closest however are limited (Q27 – 57 respondents).

Those visiting the centre tend to visit fairly regularly, with around half visiting at least once a week. Around a quarter of respondents never visit, reflecting the proximity of alternatives such as Hornchurch, Rainham and Dagenham.

Table 3.1: Frequency of Visits to Elm Park (Cumulative)

Frequency of Visit to Elm Park District Centre - Cumulative (Q28)	Cumulative %
Daily	9%
4-6 days a week	13%
2-3 days a week	20%
One day a week	8%
At least once a week	51%
Every two weeks	6%
Monthly	6%
At least once a month	64%
Once every two months	2%
Three-four times a year	1%
Once a year	2%
Less often	0%
Never / don't Know / Varies	31%
Total	100%

Source: Household Survey, Q28

Use of Centre:

The main reasons for visiting the centre are related to shopping. However access to public transport services is also an important draw.

Table 3.2: Main Reason for Visiting Elm Park

Main Reason for Visiting Elm Park District Centre (Q29)	% of Respondents using the Centre
Shopping in general	32.6%
Food shopping	24.8%
To access public transport services e.g. park and ride, bus stop, bus station, rail station	11.5%
To meet family/ friends	9.9%
Visit cafés, restaurants, and takeaways	6.1%
Visiting personal services e.g. hair salon, barber, beauty salon etc	5.6%
Non-food shopping	3.3%
Visit community services e.g. library, GP, etc.	3.3%
Visiting financial services e.g. banks, building society etc	1.2%
Visit other services e.g. travel agent, estate agent, etc	0.9%
(Don't know)	0.0%

Source: Household Survey, Q29

Customer Views:

The main like regarding Elm Park centre is its proximity to respondents' home, but other responses while given by a minority suggest accessibility both to and from the centre is an important attribute. The centre is also seen as an attractive place with a good range of shops.

Table 3.3: Main Likes about Elm Park

Main Likes about Elm Park District Centre (Q30)	% of Respondents using the Centre
Close to home	29.8%
Good public transport links	9.3%
Easy to get to by bus	7.3%
Attractive environment / nice place	7.1%
Good food stores	5.4%
Good pubs, cafés or restaurants	3.4%
Good range of non-food shops	3.3%
Quiet	2.5%
Free parking	2.5%
Good facilities	2.1%
(Don't know)	23.0%
(Nothing)	26.9%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- The centre meets the day to day shopping needs of residents and provides a good range of convenience stores, including Co-operative Food, Tesco Express and Sainsbury's Local as well as an extensive range of local services;
- The comparison offer is at the lower end of the market;
- The evening economy is limited to a small number of restaurants and 11 take-aways, following the closure of the local pub;
- The vacancy rate in October 2014 was 14% compared with a UK average of 12.5%;
- The centre is accessible by public transport via the London Underground district line and four bus routes;
- The centre is split into two distinctive areas either side of the underground station;
- The environmental quality of the areas is generally good as there has been extensive public realm investment but the presence of vacant buildings detracts from this;
- The environmental quality and perception of safety in the southern part of the centre (Station Parade and Tadworth Parade) is quite poor, due to the high number of vacant units and concentration of takeaways that are closed during the day.

The study concluded that '*overall Elm Park is able to meet day-to-day shopping needs to a generally good extent, and, with some improvement to the visual appearance of the centre, will offer generally positive vitality and viability*'.

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[10] within the town centre:

Table 3.4: Elm Park Diversity of Uses, 2018

	Elm Park Town Centre		Elm Park Primary Frontage		Elm Park Secondary Frontage	
Total Units	**118**	**100%**	**111**	**100%**	**7**	**100%**
A1	67	57%	64	58%	3	43%
A2	9	8%	7	6%	2	29%
A3	10	8%	8	7%	2	29%
A4	0	0%	0	0%	0	0%
A5	14	12%	14	13%	0	0%
Sui Generis (Other)	9	8%	9	8%	0	0%
Sui Generis (Betting Shops)	2	2%	2	2%	0	0%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	1	1%	1	1%	0	0%
D2	0	0%	0	0%	0	0%
B1	0	0%	0	0%	0	0%
Vacant	6	5%	6	5%	0	0%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses

Experian Goad do not survey Elm Park but the Council's 2022 Town Centre health checks shows the following breakdown of uses in December 2022:

- Convenience – 12.3%
- Comparison – 20.2%
- Services – 42.1%
- Leisure – 25.4%.

Comparing this with 2019 data suggests a sharp decline in the comparison offer (from 28.7%) and an increase in service provision (was 31.3%).

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Council data suggests that the centre contained a total of 24 national multiples (defined as being part of a network of nine or more outlets) in December 2022, the same as in 2019.

[10] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

National multiples in Elm Park include Co-op, Sainsbury's Local, Tesco Express, Savers, Costa Coffee and Greggs. These national brands act as key draws for visits to the centre.

Food & Beverage Provision

F&B provision in the centre appears to be relatively limited, with the majority of outlets being cafes or takeaways. There is very limited licenced premises provision and few restaurants.

Other Key Town Centre Uses

A successful town centre will provide a range of services and facilities in addition to its retail offer. In Elm Park these are limited and despite the size of the centre there are no banks represented.

Conclusions on Diversity of Uses:

Despite the high footfall associated with the use of the tube station by commuters, the variety of uses supported in Elm Park district centre is relatively limited and would seem to be geared to the needs of local residents rather than commuters.

The decline in comparison retail and increase in service outlets is typical of what is being seen in other centres across the UK although the speed of change here does seem exceptional.

Evening / Night time economy

Footfall and F&B offer within the district centre are limited during the evening period. This is likely to reflect competition from other centres nearby such as Hornchurch and the ease with which Central London can be accessed.

Vacancies

Vacancy data provided by the Council has been analysed to understand the current vacancy situation in Elm Park. The data accounts for the period of January – March 2020 through to July – September 2023.

The data can be summarised as follows:

- For the period of July to September 2023, there were 5 vacancies in the area which represents a vacancy rate of 4%.
- Since January - March 2020, the vacancy rate for Elm Park has fallen slightly from 5.7%, although there was a spike in October – December 2022 where 10 units were vacant, meaning a vacancy rate of 8.1%.
- The latest vacancy rate is much lower than that of both the London average (9.5%) and the National (UK) average (10.9%).

Changes in Representation and Market Demand

Council data indicates that there have been changes to both national multiple and independent representation in the centre in the last 3 years and the overall mix has changed away from comparison retail towards service outlets.

Market demand for representation in the area is recorded for Lidl, although this is a more general requirement for North East London[11]. Requirements from independents are not normally publicly available.

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations.

[11] The Requirements List September 2023

Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 3.5: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

Accessibility

Public Transport:

Elm Park has a strong public transport provision, with an underground station located centrally and various bus services running along The Broadway and beyond.

Elm Park tube station is located in zone 6 of the tube map and offers regular District line services through Central London and ending in Wimbledon, Richmond and Ealing Broadway. Passengers can also travel eastwards in the direction of Hornchurch and Upminster. Bus services available along The Broadway allow for travel to places such as Collier Row, Hornchurch, Lakeside Shopping Centre and Romford.

Car Accessibility:

Two car parks can be found to the north of the railway line with over 70 parking spaces combined. St Nicholas Avenue West is adjacent to Savers and Costa Coffee and can be accessed directly from the main road. Stays of up to 30 minutes are free of charge, with prices increasing up to £8 for a 12 hour stay. Parking tariffs do not apply on a Sunday. St Nicholas Avenue East car park is located by Elm Park Library and has identical charges, tariffs and conditions of use to St Nicholas Avenue West.

On-street parking can be found along St Nicholas Avenue, Elm Park Avenue and The Broadway with pay and display machines available.

Pedestrian Accessibility:

Pedestrian access and safety within the centre is good with wide pavements found on both sides of the road in most of the centre, apart from when crossing the bridge by Elm Park station where the pavement becomes narrower. A traffic light crossing with tactile paving and dropped kerbs is present at the Elm Park Underground Station entrance/ exit. Multiple zebra crossings support pedestrians with navigating the roundabout junctions to the north and south of the centre.

Cycle Accessibility:

Cycle parking can be found along The Broadway, Station Parade and Tadworth Parade for use by people travelling onward from Elm Park Station as well as visiting the local shopping parades.

Figure 3.3: Cycle Parking in Elm Park

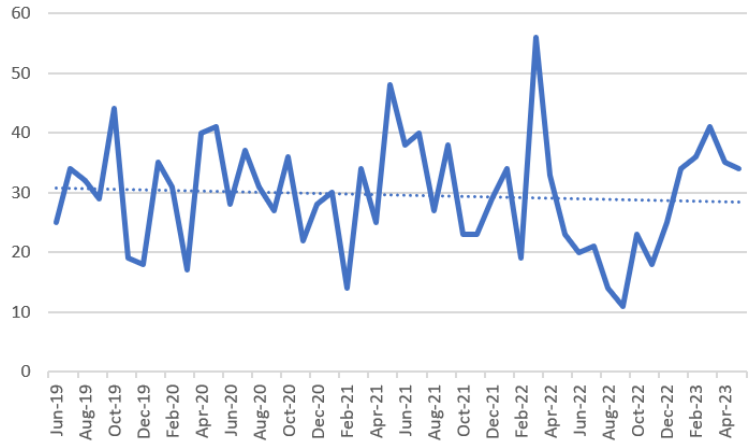
Source: LSH Site Visit

Perception of Safety and Occurrence of Crime

A central postcode within Elm Park was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, crime rates have been stable over this time, with a very minimal decrease shown overall. A high of 56 recorded crimes was seen in March 2022, and a low of 11 in September 2022.

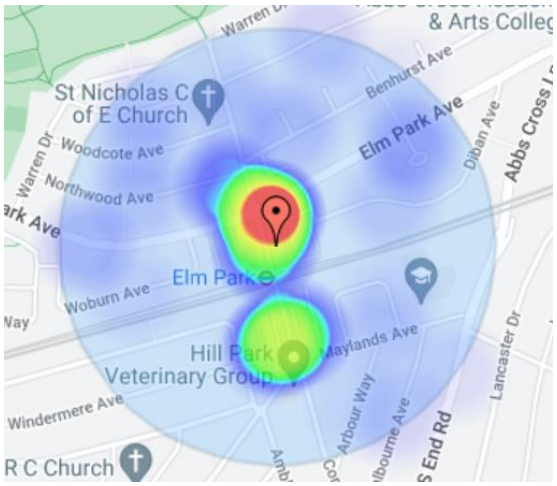
Figure 3.4: Total Crime Incidences, Elm Park, June 2019 – May 2023



Source: UKCrimeStats

The Figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, a concentration of criminal activity has taken place to the north of Elm Park tube station, at the Broadway Place roundabout. The main types of crime relate to anti-social behaviour, violence and sexual offences and shoplifting.

Figure 3.5: Crime Heat Map, Elm Park



Source: UKCrimeStats

Environmental Quality

The environmental quality of Elm Park District Centre is fair, with a decent amount of street furniture and examples of greenery dotted around, particularly to the south of the centre.

Buildings in the area are dated and in parts require some cosmetic attention in order to boost their appearance. Characterful lamp posts line both sides of the roads, making the area safer in the evenings and early mornings. The level of greenery is stronger to the south of Elm Park Underground Station with trees dotted around alongside patches of planting. A couple of large planters can be found by the roundabout to the north of the centre. The centre would benefit from additional planting, trees and general greenery.

Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches can be found in a couple of locations to the north and south of Elm Park Underground Station, providing a valuable facility for those who wish/ need to take a rest during their visit. Bike lock stands are provided within the centre, making access more convenient for those cycling into the area.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Elm Park at the present time.

There is a retained site allocation for the redevelopment of the Station and Tadworth Parades (Policy SSA 3 of the Local Plan) but we are not aware of any current plans to bring such redevelopment forward.

Barriers to Business

The current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in Elm Park.

There are a limited number of vacant properties in the centre that could be re-occupied and the changes in the retail and service offer in the centre suggest opportunities exist for new entrants. However, the decline in footfall seen since the pandemic could be a deterrent.

Stakeholder Feedback

Public consultation[12] has not provided any relevant public feedback.

SWOT Analysis

Strengths

- Tube station in the centre of the district centre
- Popular location with residents
- Relatively low vacancy rates

Weaknesses

- Small natural catchment area
- Decline in footfall when comparing pre- and post-pandemic figures likely to be linked to increased WFH and fewer commuters
- Distance between north and south parts of the centre
- Separation of the two southern parades by The Broadway and car parking which dilutes the appeal and draw of the retail offer

Opportunities

- Potential to increase F&B uses
- Redevelopment of the southern parades

Threats

- Footfall and use of tube station not recovering to pre-pandemic levels as a result of changing working practices (WFH)
- Increased competition from Hornchurch in terms of the evening economy

Conclusions

Although vacancy levels are relatively low in the centre, Elm Park appears to have experienced a significant decline in footfall as a result of the pandemic period which is likely to put pressure on those businesses in the centre that rely on commuters or passing trade.

The north and south parts of the centre are poorly integrated but the opportunity to redevelop the southern parades could allow the development of a complementary town centre offer, including

[12] Havering Characterisation Engagement, Stage 1

improved F&B provision. This in turn could boost the evening economy, although the proximity of Hornchurch means the centre's draw will always be restricted in extent.

HAROLD HILL

Description

Harold Hill is located in the north-east of the borough and comprises a purpose-built centre, with retail on the ground floor and residential above.

There is a small arcade of shops on the western side of Farnham Road but otherwise unit sizes are varied.

The centre is served by surface car parks to the front and rear of the centre and on-street parking.

The retail offer is complemented by a library and community facilities.

Current Designation:

Harold Hill is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second tier centre in the London Borough of Havering.

Figure 4.1: Harold Hill Town Centre

Source: *Havering Local Plan Policies Map*

Current Planning Policies / Designations:

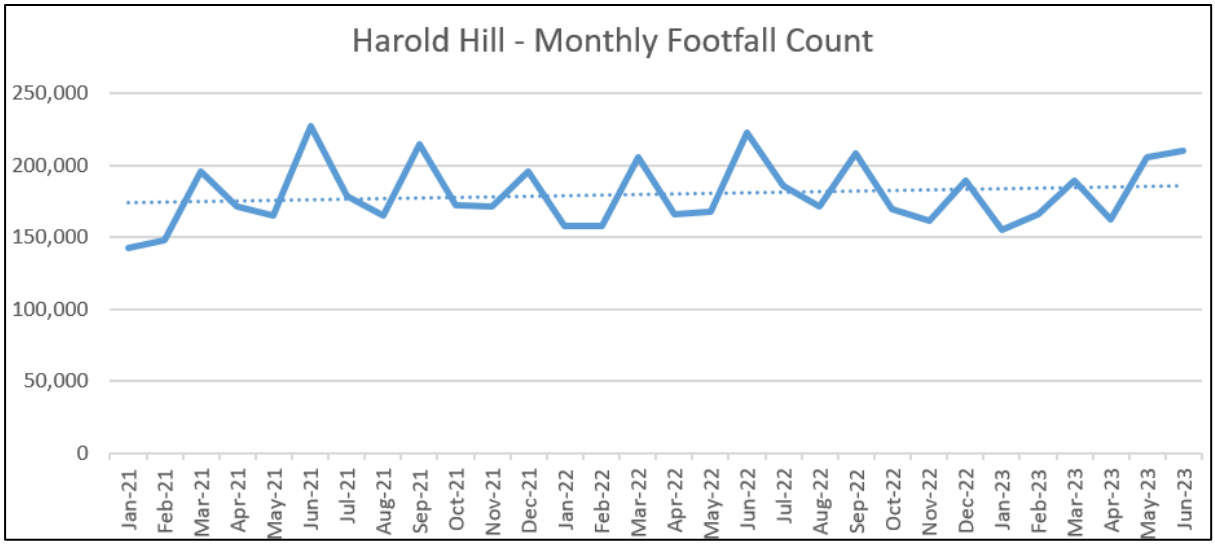
- Harold Hill is identified as having medium potential for commercial growth potential and potential for incremental residential growth in The London Plan.

Footfall:

Footfall data provided by the Council has been used to demonstrate footfall trends and changes between January 2021 and June 2023. Monthly figures have been used, with the graph below showing the month-by-month figures along with a trendline.

As can be seen, Harold Hill town centre's pedestrian activity has been relatively stable during this period. The trendline shows slight growth. The lowest month during this period came in January 2021 (footfall count of 143,000), whilst June 2021 saw a peak of 227,000.

Figure 4.2: Harold Hill – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Harold Hill is located in Zone 6 (its 'home zone') and most respondents using the centre live within the zone, although there is some inflow from Zone 11 (Brentwood).

Frequency of visit is slightly lower than seen for other centres, with 50% of respondents visiting once a month. This is likely to reflect the limited draw of the centre, which in turn will be partly due to the location of the centre within the residential area rather than on the main road network.

Table 4.1: Frequency of Visit to Harold Hill

Frequency of Visit to Harold Hill District Centre -(Q28)	Cumulative %
Daily	3%
4-6 days a week	7%
2-3 days a week	11%
One day a week	22%
At least once a week	43%
Every two weeks	4%
Monthly	3%
At least once a month	50%
Once every two months	4%
Three-four times a year	5%
Once a year	1%
Less often	6%
Never / don't Know / Varies	34%
Total	100%

Source: Household Survey, Q28

Use of Centre:

The convenience offer in the centre is the primary draw for residents, followed by shopping in general and then non-food shopping. The community services are also an important draw for a minority of respondents.

Table 4.2: Main Reasons for Visiting Harold Hill

Main Reason for Visiting Harold Hill District Centre (Q29)	% of Respondents using the Centre
Food shopping	40.9%
Shopping in general	21.2%
Non-food shopping	13.4%
Visit community services e.g. library, GP, etc.	9.1%
Visit leisure entertainment venues e.g. cinemas	3.0%
Visit other services e.g. travel agent, estate agent, etc	2.6%
Visit gambling venues e.g. betting shops, amusement arcade, bingo etc	2.1%
Visiting financial services e.g. banks, building society etc	2.0%
Visiting personal services e.g. hair salon, barber, beauty salon etc	1.3%
Attending church	0.7%
(Don't know)	3.7%

Source: Household Survey, Q29

Customer Views:

Proximity to home is the key 'like' for respondents, but the wide range of other responses suggests it is a popular centre, with the availability of good and free parking and the quality of the provision mentioned by respondents.

Table 4.3: Main Likes about Harold Hill

Main Likes about Harold Hill District Centre (Q30)	% of Respondents using the Centre
Close to home	27.1%
Attractive environment / nice place	8.3%
Easy to park	5.9%
Good food stores	5.3%
Good facilities	4.5%
Easy to get to by bus	3.9%
Good range of non-food shops	3.3%
Free parking	2.7%
Good leisure facilities	2.0%
Good range of specialist shops	2.0%
Easy to get to by car	2.0%
(Don't know)	34.2%
(Nothing)	23.4%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- Most of the retail units are independently owned, although there are a few national multiples – Iceland, Co-operative Food, Sainsbury's Local, Superdrug, Boots, Boots Opticians, Halifax, Santander, William Hill and Ladbrokes;
- The main focus of the retail offer is the provision of convenience goods and some services such as banking and hairdressing;
- The vacancy rate at the time of the study was 20%, although this partly reflected the renovation works being undertaken to create a new library. Allowing for this the vacancy rate is 5.6%;
- The centre is of good environmental quality;
- The centre is served by 4 bus routes which represents a good level of accessibility given the role and function of the centre.

At this time the diversity of uses were as follows:

Table 4.4: Harold Hill Diversity of Uses (Units), 2015

	No. of Units	% of total	% UK average	% Difference to UK average
Convenience	15	22.4	9.0	13.4
Comparison	20	29.9	40.5	-10.6
Service and Miscellaneous	21	31.4	36.9	-5.5
Vacant	11	16.4	12.5	3.9

Source: Experian Goad

Table 4.5: Harold Hill Diversity of Uses (Floorspace), 2015

	Floorspace (m^2)	% of total	% UK average	% Difference to UK average
Convenience	2,990	32.6	18.1	14.5
Comparison	3,080	33.6	45.6	-12.0
Service and Miscellaneous	2,440	26.6	24.8	1.8
Vacant	650	7.1	10.5	-3.4

Source: Experian Goad

Source: HRCLNA, Tables 3.5 & 3.6

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[13] within the town centre:

[13] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Table 4.6: Harold Hill Diversity of Uses, 2018

	Harold Hill Town Centre		Harold Hill Primary Frontage		Harold Hill Secondary Frontage	
Total Units	**66**	**100%**	**52**	**100%**	**14**	**100%**
A1	42	64%	35	67%	7	50%
A2	6	9%	4	8%	2	14%
A3	5	8%	4	8%	1	7%
A4	0	0%	0	0%	0	0%
A5	1	2%	1	2%	0	0%
Sui Generis (Other)	7	11%	5	10%	2	14%
Sui Generis (Betting Shops)	2	3%	2	4%	0	0%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	1	2%	0	0%	1	7%
D2	0	0%	0	0%	0	0%
B1	0	0%	0	0%	0	0%
Vacant	2	3%	1	2%	1	7%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses (July 2022)

The Experian Goad plan for Harold Hill covers a slightly larger area than the defined centre, including St Georges Church and adjoining buildings located to the south of Chippenham Road. This will not affect the retail offer statistics.

A summary of the centre offer in July 2022 shows an above average convenience and retail service offer in the centre and below average comparison and leisure services.

Table 4.7: Experian Goad Diversity of Uses, Harold Hill

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Harold Hill	UK Average		Harold Hill	UK Average
Comparison Retail	10	14.7%	26.8%	2,090	22.2%	30.1%
Convenience Retail	17	25.0%	9.3%	3,177	33.7%	15.5%
Retail Services	13	19.1%	15.8%	1,282	13.6%	7.2%
Leisure Services	10	14.7%	25.5%	1,236	13.1%	26.4%
Financial & Business Service	3	4.4%	8.7%	548	5.8%	6.5%
Vacant	15	22.0%	13.8%	1,106	11.7%	13.7%
Total	68	100.0%	100.0%	9,439	100.0%	100.0%

Source: Experian Goad

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail

centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Experian Goad identified 15 national multiples (defined as being part of a network of nine or more outlets) in Harold Hill at the time of their most recent survey (July 2022). The findings indicate a below average proportion of national multiples in comparison retail and considerably above average proportion of convenience retail.

National multiples in Harold Hill include Sainsbury's Local, Boots Pharmacy, Iceland, Co-op and Greggs. These national brands act as key draws for visits to the centre.

Food & Beverage Provision

The centre has a limited F&B offer of just 7 units.

Table 4.8: Food & Beverage Provision Breakdown, Harold Hill

Type of Use	Number	% All Town Centre Outlets	% UK Outlets
Bars & Wine Bars	0	0.0%	2.3%
Cafes	1	1.5%	5.0%
Fast Food & Takeaways	3	4.4%	6.1%
Public Houses	1	1.5%	2.6%
Restaurants	2	2.9%	4.9%
Total	7	10.3%	20.9%

Source: Experian Goad

Other Key Town Centre Uses

As a purpose-built centre Harold Hill includes a good range of community facilities given its overall limited size. The library and community hub are centrally located and the centre has both a Post Office and bank.

Conclusions on Diversity of Uses:

Although Harold Hill is the smallest of the district centres in Havering, it provides a good mix of retail, service and community facilities for the local population. It has a strong convenience and retail service offer but more limited comparison and leisure provision.

Evening / Night time economy

Harold Hill is a small centre with an evening offer limited to a public house and a small number of F&B units. This is to be expected for the size of centre and catchment population that it serves.

Vacancies

Experian Goad vacancy rates (July 2022) are significantly above the UK average in terms of the number of units that are vacant (22.0% compared with a UK average of 13.8%) but many of these units are small and therefore vacancy rates by floorspace are slightly below average.

This is likely to reflect the concentration of vacant units within The Arcade. There is also a higher vacancy rate to the south of the centre, away from the main parking areas.

Figure 4.3: Experian Goad Vacancy Map, Harold Hill

Source: Experian Goad

Vacancy data provided by the Council has been analysed to further understand the current vacancy situation in Harold Hill. The area that this data covers is similar to that of Goad. The data accounts for the period of January – March 2020 through to July – September 2023.

The findings of this data can be summarised as follows:

- For the period of July to September 2023, there were 9 vacancies in the area which represents a vacancy rate of 13.4%.
- Since January – March 2020, the vacancy rate for Harold Hill has fallen slightly, down from 14.3%. Since then, however, rates peaked at 24.3% (17 units) in April – June 2022.
- The latest vacancy rate is higher than both the London average (9.5%) and the National (UK) average (10.9%).

Changes in Representation and Market Demand

The period since 2018 seems to have seen a decline in the retail offer within the centre and an increase in retail services. This is consistent with national trends.

Market demand for representation in the area is recorded for M&S Simply Food and The Range, although both are more general requirements for London[14]. Requirements from independents are not normally publicly available.

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations.

[14] The Requirements List September 2023

Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 4.9: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

Accessibility

Public Transport:

With Harold Wood train station located just over 1 mile to the south of Harold Hill District Centre, bus services provide the most accessible form of public transport. These bus services do however run to and from Harold Wood train station (travel time of around 10 minutes), which then offers Elizabeth Line rail services into Central London. Buses running to the north of the District Centre along Hilldene Avenue also connect to places such as Noak Hill, Romford and Dagenham Heathway.

Car Accessibility:

There is a good provision of car parking in Harold Hill District Centre, located centrally and conveniently along Farnham Road and to the northern area of the centre. There are over 200 parking spaces available with pay and display machines located across the centre.

Pedestrian Accessibility:

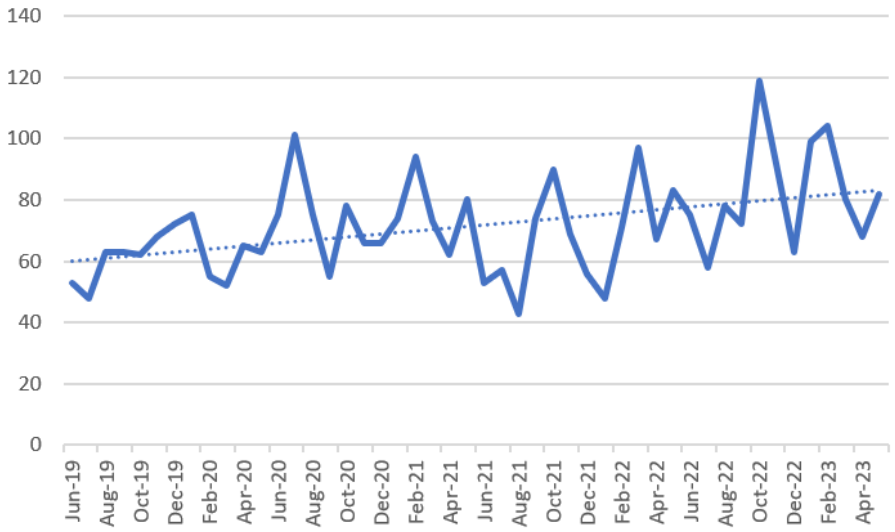
Pedestrian access and safety within Harold Hill District Centre is adequate with pavements found on both sides of the road. Although there are no traffic light or zebra crossings, given the nature of the roads and centre, the multiple dropped kerb crossings with tactile paving are enough to allow pedestrians to navigate the centre safely.

Perception of Safety and Occurrence of Crime

A central postcode within Harold Hill was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, a steady increase in criminal activity has taken place in this time, with average monthly crime rates going from around 60 up to and above 80. In October 2022, 119 crimes were recorded which represents the peak of the last four years.

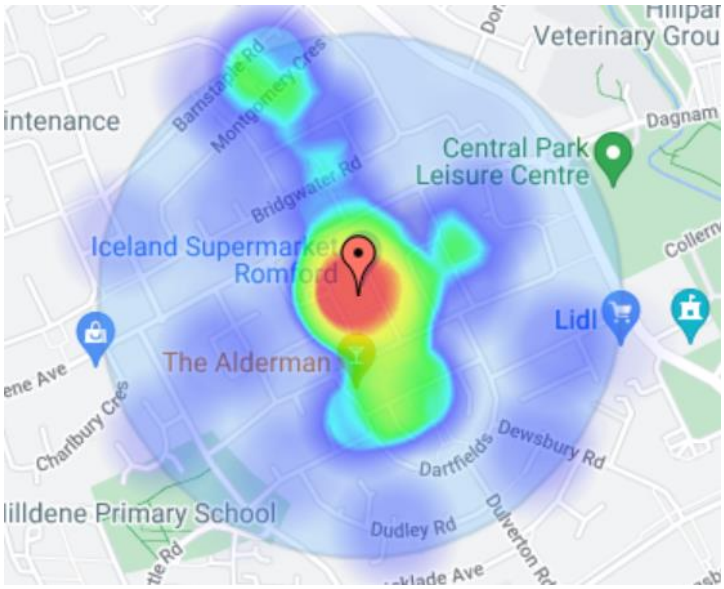
Figure 4.4: Total Crime Incidences, Harold Hill, June 2019 – May 2023



Source: UKCrimeStats

The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, the concentration of criminal activity takes place very centrally to the area along Farnham Road, near to where retailers like Iceland and Superdrug are located. The main types of crime relate to violence and sexual offences, anti-social behaviour and shoplifting.

Figure 4.5: Crime Heat Map, Harold Hill



Source: UKCrimeStats

Environmental Quality

The environmental quality of Harold Hill District Centre is fair, with a decent amount of street furniture but a distinct lack of greenery, on Farnham Road.

Whilst the buildings are dated, they do not look to be in any sort of disrepair or ruin. Residential buildings to the north of the centre are in need of some cosmetic attention to improve their appearance. Lamp posts are present throughout the centre, making the area safer in the evenings and early mornings.

An adequate provision of bins and seating is available around the centre. Bike lock stands are also present, improving accessibility for those cycling into Harold Hill District Centre.

Investment Plans and Development Opportunities

The Council has major redevelopment plans for Harold Hill centre. The first phase involves the construction of a new family welcome centre and health centre, which is due to be completed in 2024/25. Phase 2 of the proposed works was consulted on in August 2023 and the whole investment programme is expected to last 9 years.

Barriers to Business

The current vacancies offer a range of unit sizes that could accommodate a range of occupiers and uses but the current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in Harold Hill.

Stakeholder Feedback

Public consultation[15] has provided the following public feedback:

- Strengths:
  - The local centre has capacity to provide better for the needs of the local population.
- Issues:
  - Residents were concerned that the local centre had deteriorated and now didn't live up to its potential. Long-term residents indicated how the range of shops in the centre had reduced. Some made suggestions for new uses that would be welcome: an Afro-

[15] Havering Characterisation Engagement, Stage 1

Caribbean hairdressers, access to Council services, a clothes shop, healthy takeaway options etc.
    - Residents feel that anti-social behaviour is a big problem in the centre, and that not enough is done to resolve these issues. People don't feel comfortable walking around the centre at night.
    - Residents felt that the local area feels uncared for with no sense of maintenance or upkeep. Many said the place was dirtier and more littered than in past decades. Residents feel litter ruins the atmosphere and character. It was suggested that better surveillance may reduce this issue.
    - Parking is very difficult in the town centre due to broken parking meters.
- Other comments:
    - Harold Hill is quiet and has difficulties with parking and access to council services.

SWOT Analysis

Strengths

- Purpose-built relatively modern centre serving defined residential area
- Good car parking provision
- Good community facilities and range of offer

Weaknesses

- Restricted catchment area
- Located within residential area reducing passing trade
- Lack of train/ tube station
- Vacancy rates are above the London and UK averages

Opportunities

- Council ownership
- Major investment and redevelopment being undertaken
- Limited through traffic
- Relatively extensive and attractive public realm and opportunities for enhancement

Threats

- Competition from nearby out-of-centre Lidl
- Loss of financial services (bank and/or Post Office)

Conclusions

Harold Hill is a relatively small district centre but provides a good mix of retail, community and service uses to meet the needs of the local population.

As a more modern, purpose-built centre it is centrally located to serve its resident population and benefits from good access from the immediate area. Car parking is good and being in the ownership of the Council, there are opportunities for better centre management.

There is significant, long-term investment being made in the centre.

HORNCHURCH

Description

Hornchurch is a large centre located in the centre of the borough, with its focal point being along the A124 and the junction of High Street, Station Lane and North Street. The defined centre extends northwards to include Billet Lane and North Street.

Primary Frontages are concentrated along High Street and around the junction with North Street and Station Lane. Secondary frontages continue along eastern part of High Street and west of and including parts of Billet Lane.

The retail offer is provided in a range of building types of differing ages, including some modern units.

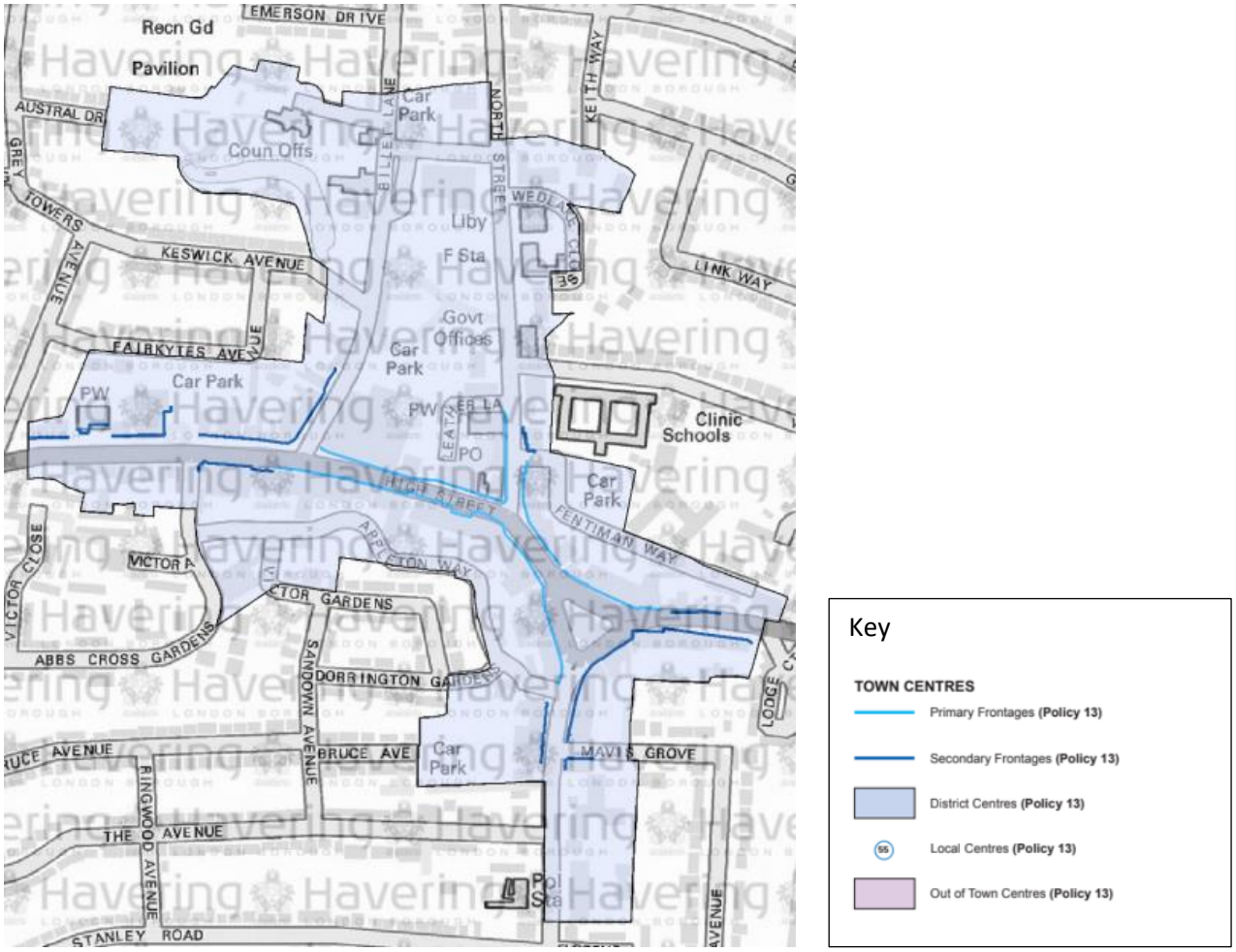
Much of the centre, north of High Street is within the Langtons Conservation Area, while the area to the east is within the St Andrews Conservation Area.

Queen's Theatre is a 500+ seat venue that falls within the Langtons Conservation Area. Fairkytes Arts Centre is located opposite Queen's Theatre and offers a wide range of activities for people of all ages.

Current Designation:

Hornchurch is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second tier centre in the London Borough of Havering.

Figure 5.1: Hornchurch Town Centre



Source: Havering Local Plan Policies Map

Current Planning Policies / Designations:

- Hornchurch is identified as having low potential for commercial growth potential and medium potential for residential growth potential in The London Plan; and
- Hornchurch is identified being in the NT3 night-time economy classification.

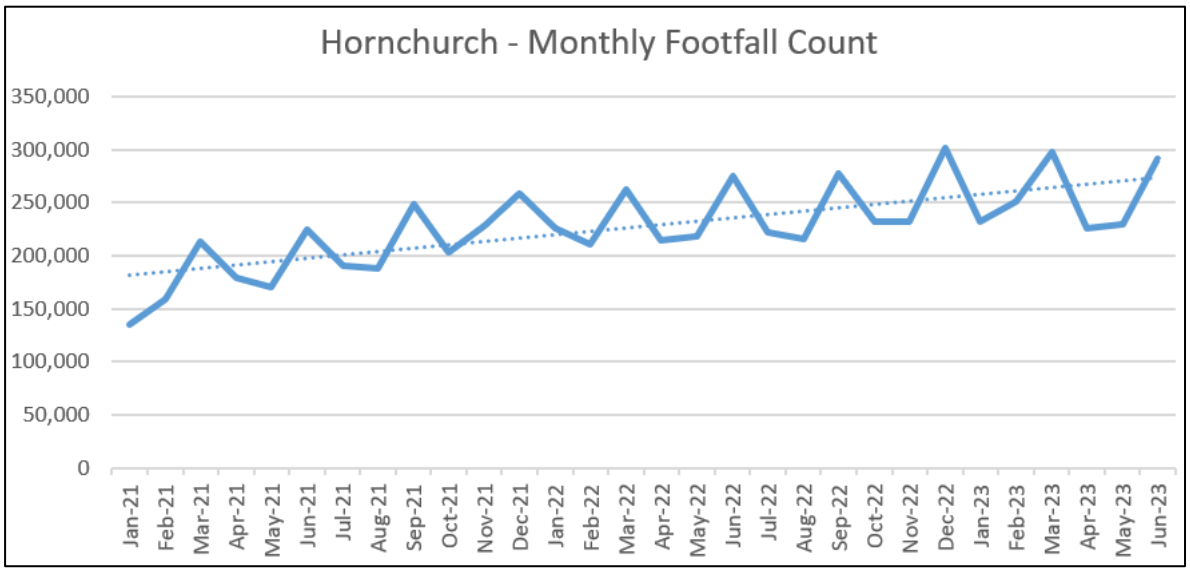
Footfall:

The Council have provided two sets of footfall data. The first sets out a pre- and post- pandemic (2019 vs 2022) comparison whilst the second outlines monthly footfall figures from January 2021 through to June 2023.

The 2019 vs 2022 pre- and post-pandemic data shows that footfall levels were 16% lower in 2022 than 2019, which is similar to the change seen in Greater London (-17.6%).

The monthly footfall data (January 2021 – June 2023) can be seen in the graph below. The trendline shows that pedestrian activity has been growing strongly during this period, likely due to the easing and subsequent removal of pandemic-related restrictions.

Figure 5.2: Hornchurch – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Hornchurch is located in Zone 2 of the Study Area (its 'home zone') but has a relatively extensive draw also attracting respondents from Zones 6 (Harold Hill), 8 (Chadwell Heath), 9 (Dagenham), 10 (Rainham) and 11 (Brentwood).

Those using the centre do so regularly, with 60% of respondents visiting at least once a week.

Table 5.1: Frequency of Visits to Hornchurch

Frequency of Visit to Hornchurch District Centre - Cumulative (Q28)	Cumulative %
Daily	6%
4-6 days a week	5%
2-3 days a week	23%
One day a week	26%
At least once a week	60%
Every two weeks	7%
Monthly	15%
At least once a month	82%
Once every two months	4%
Three-four times a year	3%
Once a year	1%
Less often	3%
Never / don't Know / Varies	7%
Total	100%

Source: Household Survey, Q28

Use of Centre:

Shopping is the main reason for visiting the centre with equal proportions of respondents (30%) indicating that the main reason for visiting is food shopping or shopping in general. Financial services, non-food shopping and the F&B offer are also important draws.

Table 5.2: Main Reasons for Visiting Hornchurch

Main Reason for Visiting Hornchurch District Centre (Q29)	% of Respondents using the Centre
Food shopping	29.9%
Shopping in general	29.6%
Visiting financial services e.g. banks, building society etc	10.6%
Non-food shopping	9.0%
Visit cafés, restaurants, and takeaways	8.1%
Visiting personal services e.g. hair salon, barber, beauty salon etc	5.8%
For work/ business	3.1%
(Don't know)	1.5%
(Don't know)	0.0%

Source: Household Survey, Q29

Customer Views:

The centre is valued for its proximity to home by many of the respondents but the attractive environment, good range of F&B outlets and non-food shops are also important draws.

Table 5.3: Main Likes about Hornchurch

Main Likes about Hornchurch District Centre (Q30)	% of Respondents using the Centre
Close to home	28.8%
Attractive environment / nice place	14.0%
Good pubs, cafés or restaurants	13.7%
Good range of non-food shops	10.8%
Easy to park	6.1%
Compact	4.7%
Good food stores	4.6%
Quiet	4.0%
Safe and secure	3.4%
Close to work	3.0%
Easy to get to by bus	2.5%
Good cultural facilities	2.1%
Traditional	2.0%
Good financial institutions	2.0%
(Don't know)	24.2%
(Nothing)	8.2%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- The centre benefits from good accessibility, provided by national rail services, London Underground and 7 bus routes, although the tube station is not in the town centre;
- The environmental quality of the centre is good, a number of key sites have been redeveloped and there has been recent significant investment in the public realm including traffic calming measures;
- The vacancy rate of 6% is less than half the UK average; There has been a significant increase in vacancies since the Experian Goad survey in 2013, but no particularly prominent units within the PSA;
- The retail offer contains a good diversity of comparison, convenience and service retail units;
- The centre has an impressive commercial leisure offer, making the centre a borough-wide leisure destination for eating and drinking and lends it a stronger 'evening economy' than would typically be expected for a district centre;
- There is a high number of independent restaurants and national multiples including Nando's, Zizzi, Ask, Prezzo, Starbucks, Costa and a Wetherspoons pub;
- As a result, much of the centre does not benefit from strong footfall during retail trading hours;
- The convenience offer is anchored by a Sainsbury's supermarket and supplemented by Iceland and a range of small convenience stores;
- The convenience offer is rather limited and the fact that the former Little Waitrose unit has continued to be vacant for over a year suggests a lack of retailer demand;
- The comparison offer is at the mid-range of the market, with a number of national multiples but there is a high proportion (22%) of charity and discount stores;
- The centre is considered Havering's cultural centre, with the offer including the Fairkytes Art Centre and the Queens Theatre.

At that time the diversity of uses was as follows:

Table 5.4: Hornchurch Diversity of Uses (Units), 2015

	No. of Units	%of total	% UK average	% Difference to UK average
Convenience	9	5.2	9.0	-3.8
Comparison	64	37.2	40.5	-3.3
Service and Miscellaneous	94	54.7	36.9	17.8
Vacant	5	2.9	12.5	-9.6

Source: Experian Goad

Table 5.5: Hornchurch Diversity of Uses (Floorspace), 2015

	Gross Floorspace (m^2)	% of total	% UK average	% Difference to UK average
Comparison	5,340	18.3	18.1	0.2
Convenience	10,060	34.4	45.6	11.2
Service and Miscellaneous	12,930	44.2	24.8	19.4
Vacant	920	3.1	10.5	7.4

Source: Experian Goad

Source: HRCLNA, Tables 3.7 & 3.8

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[16] within the town centre:

[16] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Table 5.6: Hornchurch Diversity of Uses, 2018

	Hornchurch Town Centre		Hornchurch Primary Frontage		Hornchurch Secondary Frontage	
Total Units	**191**	**100%**	**101**	**100%**	**90**	**100%**
A1	90	47%	60	59%	30	33%
A2	20	10%	12	12%	8	9%
A3	38	20%	16	16%	22	24%
A4	7	4%	2	2%	5	6%
A5	4	2%	1	1%	3	3%
Sui Generis (Other)	14	7%	4	4%	10	11%
Sui Generis (Betting Shops)	6	3%	4	4%	2	2%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	6	3%	0	0%	6	7%
D2	0	0%	0	0%	0	0%
B1	1	1%	0	0%	1	1%
Vacant	5	3%	2	2%	3	3%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses (October 2022)

The Experian Goad plan for Hornchurch covers a similar area to the defined district centre, and therefore the Goad survey results should be similar to those presented in Council surveys.

Reviewing the Goad data, Hornchurch is an unusual centre in that the greatest number of units and floorspace is devoted to leisure service uses, with comparison retail being considerably low the UK average and lower than convenience provision in terms of floorspace. The centre also has a strong financial & business services offer.

Table 5.7: Experian Goad Diversity of Uses, Hornchurch

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Hornchurch	UK Average		Hornchurch	UK Average
Comparison Retail	37	18.6%	26.8%	6,122	17.2%	30.1%
Convenience Retail	15	7.5%	9.3%	8,854	24.8%	15.5%
Retail Services	32	16.1%	15.8%	2,954	8.3%	7.2%
Leisure Services	69	34.7%	25.5%	11,306	31.7%	26.4%
Financial & Business Service	33	16.6.%	8.7%	4,459	12.5%	6.5%
Vacant	13	6.5%	13.8%	1,960	5.5%	13.8%
Total	199	100.0%	100.0%	35,655	100.0%	100.0%

Source: Experian Goad

This is confirmed by the Council's 2022 Town Centre health checks. This data also shows an increase in leisure and convenience provision since 2019.

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Experian Goad identified 54 national multiples (defined as being part of a network of nine or more outlets) in Hornchurch at the time of their most recent survey (October 2022). The findings indicate a particularly strong representation in the leisure and financial & business services sectors, whilst floorspace representation of convenience (43% of total floorspace) performs above the national average (27%) due to the size of the Sainsbury's and Lidl units.

National multiples in Hornchurch include Sainsbury's, Lidl, Iceland, Costa Coffee, Starbucks, Nando's, Boots, Barclays Bank, Lloyds Bank and Specsavers. These national brands act as key draws for visits to the centre.

Food & Beverage Provision

F&B provision is approximately 50% above the UK average, mainly reflecting the high number of restaurants in the centre. Other provision is relatively close to the UK average.

Table 5.8: Food & Beverage Provision Breakdown, Hornchurch

Type of Use	Number	% All Town Centre Outlets	% UK Outlets
Bars & Wine Bars	7	3.5%	2.3%
Cafes	10	5.0%	5.0%
Fast Food & Takeaways	12	6.0%	6.1%
Public Houses	4	2.0%	2.6%
Restaurants	27	13.6%	4.9%
Total	60	30.1%	20.9%

Source: Experian Goad

Other Key Town Centre Uses

The strong financial offer provided in the centre is reflected in the presence of many of the main banks. The centre also includes the Queens Theatre, public library and Council offices.

Conclusions on Diversity of Uses:

Hornchurch has a good convenience and comparison retail offer for a district centre, including a number of national multiples, but its primary function is as a service centre. It has a particularly strong leisure offer, including 60 F&B outlets and also a good range of financial and business services. Service uses have declined slightly since 2019 but convenience provision has increased.

Evening / Night time economy

Hornchurch is identified as being in the NT3 night-time economy classification in The London Plan and this is reflected in the current offer in the centre, which includes cultural and F&B provision.

The centre also includes average or above average numbers of bingo & amusements, casinos & betting offices and sports and leisure facilities and the Queen's Theatre is the largest in the borough. However only 1 club and no nightclubs are recorded by Goad.

Vacancies

Experian Goad vacancy rates (October 2022) in the centre are considerably lower than the UK average both in terms of the number of units and the floorspace affected. This has been the case since at least 2015. The Goad plan for the centre also shows that these are dispersed throughout the centre and there is no obvious cluster that could point to a failing part of the centre.

Figure 5.3: Experian Goad Vacancy Map, Hornchurch

Source: Experian Goad

Vacancy data provided by the Council has been analysed to further understand the current vacancy situation in Hornchurch. The area that this data covers is similar to that of Goad. The data accounts for the period of January – March 2020 through to July – September 2023.

The data can be summarised as follows:

- For the period of July to September 2023, there were 16 vacancies in the area which represents a vacancy rate of 8.5%.
- Since January - March 2020, the vacancy rate for Hornchurch has more than doubled from 4.2%. There has been a trend of consistently rising rates during this period, with April – June 2022 offering the only exception.
- The latest vacancy rate is lower than both the London average (9.5%) and the National (UK) average (10.9%).

Changes in Representation and Market Demand

Council data suggests that there have been changes to both national multiple and independent representation in the centre in the last 3 years. During that time leisure representation has increased whilst the comparison offer and number of national multiples has declined.

Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below. This lists all retailers who have indicated a requirement for Hornchurch or the general area. As a result the list should not be interpreted as meaning all the companies listed would be interested in opening an outlet in Hornchurch town centre. However, it does suggest a relatively limited demand in terms of published requirements, mainly the leisure and F&B sectors[17].

Table 5.9: Retailer Requirements List, Hornchurch

Name	Description
Busy Bees	Day nursery
COOK	Frozen ready meals
Heavenly Desserts	Dessert parlour
Innkeeper's Lodge	Pub, Restaurant & Hotel
Miller & Carter	Steakhouse & Grill
Perseus	Care home operator
Ready Burger	Plant-based burgers
Travelodge London (North East)	Hotel

Source: The Requirements List September 2023

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 5.10: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35

[17] The Requirements List September 2023

Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

Accessibility

Public Transport:

Hornchurch has a strong provision of bus services that run through the centre, supported by accessible rail services nearby.

Bus routes can be picked up along the High Street, with frequent services running to places such as Romford, Rainham and Elm Park. They also provide connections to nearby rail links. Emerson Park is an Overground station located just over a third of a mile north of Hornchurch centre with services running east to Upminster and west to Romford. Hornchurch Underground station is roughly half a mile south of Hornchurch centre and is served by the District Line running east to Upminster and west into Central London.

Car Accessibility:

Hornchurch has three main car parks in and around the centre, with a combined total of roughly 400 parking spaces. Dorrington Gardens is the largest, accounting for almost half of this number. It is located to the south of the centre with charges starting at £1.50 for up to an hour from Monday to Saturday and free parking on Sundays. Appleton Way Car Park and Fentiman Way Car Park can be found more centrally. These car parks make up for a distinct lack of on-street parking.

Pedestrian Accessibility:

Pedestrian access and safety within the centre is good with wide pavements found on both sides of the main roads. There are traffic light stops with tactile paving and dropped kerbs to provide aid to those with disabilities or pushchairs as well as multiple zebra crossings. In addition, the High Street is a 20mph zone and there are uncontrolled crossing points where the road is raised to create a flat crossing for pedestrians (see below), which also acts as a traffic calming measure. A pedestrian island is also present along High Street to aid pedestrians when navigating the two lanes of traffic.

Figure 5.4: Pedestrian Accessibility in Hornchurch

Source: LSH Site Visit

Cycle Accessibility:

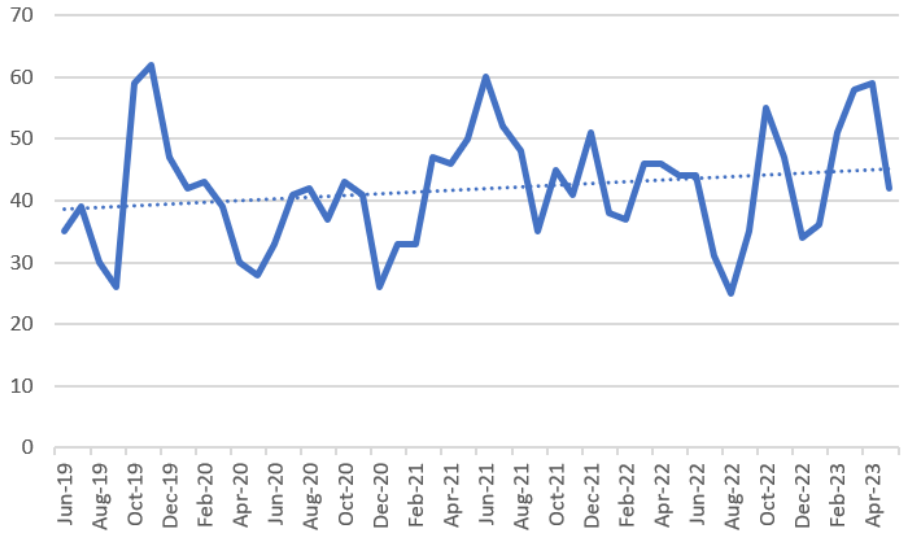
Cycle Parking can be found at several locations along the main High Street as well as in North Street and Billet Lane.

Perception of Safety and Occurrence of Crime

A central postcode within Hornchurch was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, crime rates have been relatively stable during this time, with a high of 62 crimes recorded in one month (November 2019) and a low of 25 (August 2022).

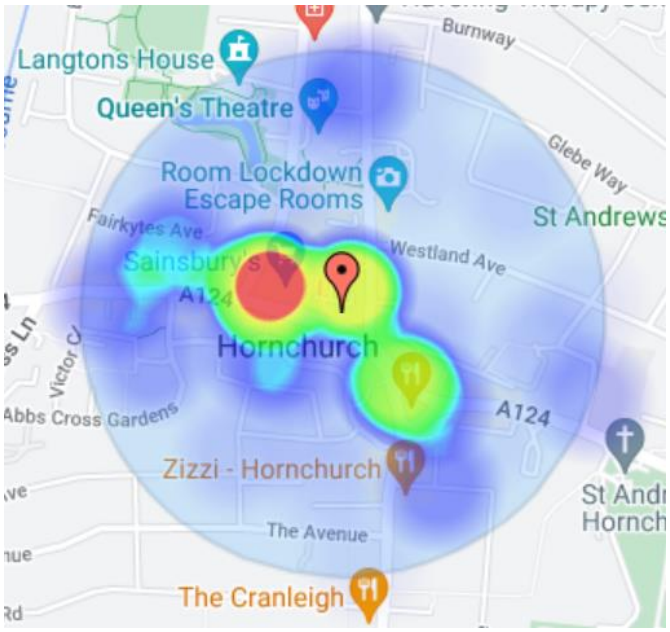
Figure 5.5: Total Crime Incidences, Hornchurch, June 2019 – May 2023



Source: UKCrimeStats

The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, a concentration of criminal activity has taken place near to the Sainsbury's store along High Street. The main types of crime relate to violence and sexual offences, anti-social behaviour and other theft.

Figure 5.6: Crime Heat Map, Hornchurch



Source: UKCrimeStats

Environmental Quality

The environmental quality of Hornchurch District Centre is fair, with a good amount of street furniture and examples of greenery dotted around.

Lamp posts line both sides of the roads, making the area safer in the evenings and early mornings. Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches can be found in several locations. Bike rack stands are in multiple parts of the centre making it easier for those who wish to cycle to the area.

Hornchurch District Centre has some trees as well as several planters along the pavements to offer some greenery and soften the hard nature of the centre. Various leisure outlets have also used planted dividers to create an outdoor area. The introduction of some hanging baskets as well as some more permanent planted/ grassed areas would go a long way.

In the north western part of the centre, Langtons House and Gardens (image below) provides a peaceful escape from the busier parts of the centre. Wildlife and greenery can be enjoyed with benches and bins provided within the area. This area, along with Queen's Theatre is covered by the Langtons Conservation Area which recognises the historical and architectural significance of the area and looks to preserve this going forward.

Figure 5.7: Langtons House and Gardens

Source: LSH Site Visit

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Hornchurch at the present time.

Barriers to Business

The limited number of vacant units in the centre could be a barrier to new businesses wishing to open in Hornchurch centre, but the current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in the short term.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to Hornchurch district centre:

- Hornchurch provides a local shopping experience
- It is well serviced with restaurants and bars
- Banks not funding projects is major hurdle for new businesses

Public consultation[18] has also provided the following public feedback:

- Strengths:
    - Residents said that Hornchurch has a friendly community, which creates a nice atmosphere and a village-like feel.
    - People enjoy the look and feel of the high street and often visit for a walk around even if they don't have any shopping to do.
    - The range of shops and mix of uses in the town centre satisfies the local population well for every day needs and exploring the town centre on the weekend.

[18] Havering Characterisation Engagement, Stage 1

- The Queens Theatre and Harrow Lodge Leisure Centre were mentioned as key assets for the town.
- The town centre and surrounds are walkable, and many of the residents access the town centre by foot.
- The Freedom Pass for 65+ years is a popular and incentivises public transport use.
- Hornchurch is seen as a cultural centre with the Queens Theatre at the forefront of this identity.

- Issues:
  - Some residents felt that parking could be improved in the town centre.
  - There were concerns that older buildings have been lost to make way for new development in the centre, such as for the Lidl development.
- Other comments:
  - Hornchurch is seen as being busy with cafés, good shops and a good community that keeps the centre clean.

SWOT Analysis

Strengths

- Vacancy rate is lower than London and UK averages
- Strong leisure offer, including theatre and extensive F&B offer
- Above average convenience provision
- Attractive environment including two conservation areas

Weaknesses

- Declining comparison offer
- Lack of space to cater for new forms of leisure activity

Opportunities

- Growth of an already popular and established area for evening and night time activities

Threats

- Decline of day-time activities if demand for evening or night time activities continues to grow
- Continued economic pressures on F&B sector
- Vacancy rates have been rising in recent years

Conclusions

Hornchurch is one of the larger district centres in Havering and appears to have a dual function, providing a retail and service offer to meet the needs of local residents, as well as a wider draw for its leisure offer, including cultural and F&B facilities.

The recent decline in the comparison offer should not inconvenience local residents given the proximity of Romford, but there is a risk that too much concentration on the night time economy could result in a loss of activity during the day time.

RAINHAM

Description

Rainham is a small district centre located in the south of the borough.

It is anchored by a Tesco Extra supermarket which provides a range of retail services from within the store. The store is relatively separate from the rest of the centre but is linked by a clear pedestrian route with a crossing point across Viking Way.

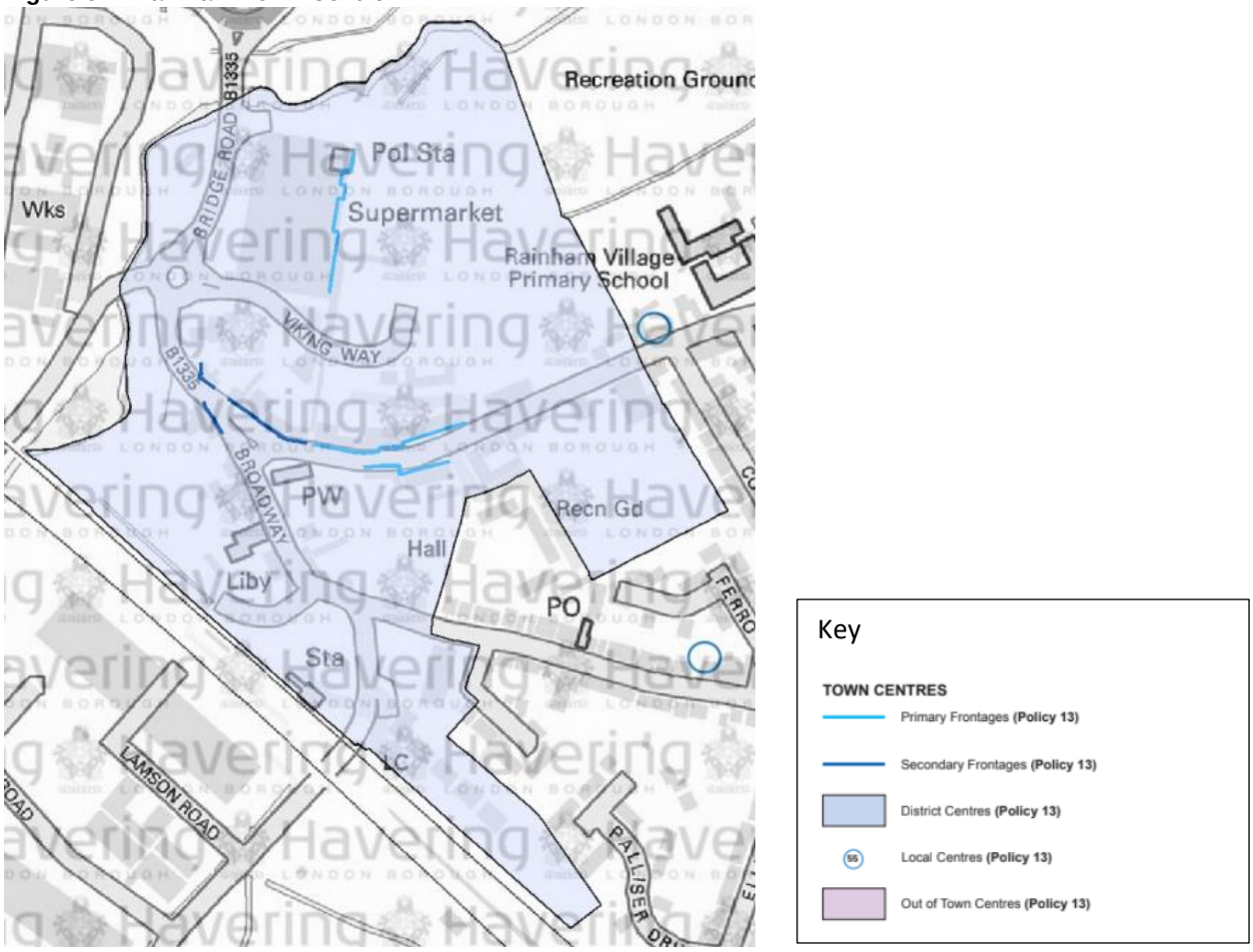
The rest of the centre and Primary frontage is concentrated on Upminster Road South.

Much of the centre is within the Rainham Conservation Area.

Current Designation:

Rainham is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second tier centre in the London Borough of Havering.

Figure 6.1: Rainham Town Centre



Source: Havering Local Plan Policies Map

Current Planning Policies / Designations:

- Rainham is identified as having low commercial growth potential and has incremental potential for residential growth potential in The London Plan.
- The centre sits within the NT3 night time economy classification.
- Rainham District Centre is identified as an Opportunity Area in The London Plan

- Policy 2 of the Local Plan (Rainham and Beam Park Strategic Development Area) includes a proposal for the delivery of a new local centre adjoining Beam Park Station of between 3500 – 4000 sqm of retail and commercial floorspace. The policy also supports the redevelopment of undesignated sites in Rainham District Centre.
- Land between Railway and Broadway is allocated for development (Policy SSA 13) with retail and leisure uses encouraged along the Broadway frontage. The loss of the existing library will only be permitted if a suitable replacement facility is provided.
- The redevelopment of Rainham Central (Policy SSA 16 requires any proposals to, inter alia, better integrate the foodstore with the heart of the Village; provide a positive frontage to Bridge Road and improve the retail offer within the fringe and core retail areas along Broadway and Upminster Road.

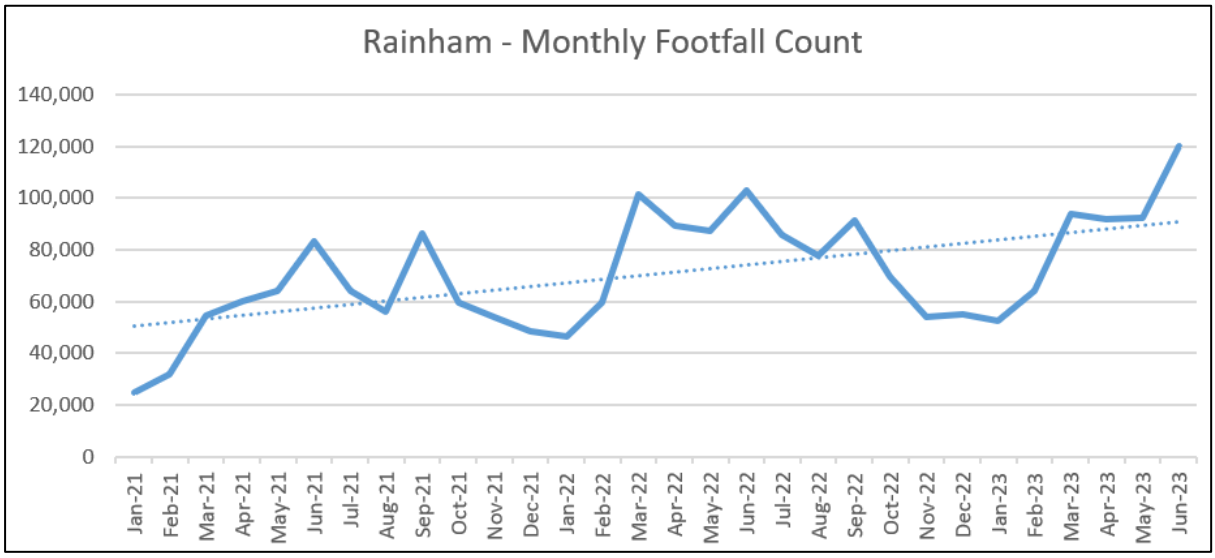
Footfall:

The Council have provided two sets of footfall data. The first sets out a pre- and post- pandemic (2019 vs 2022) comparison whilst the second outlines monthly footfall figures from January 2021 through to June 2023.

The 2019 vs 2022 pre- and post-pandemic data shows that footfall levels were 9.8% lower in 2022 than 2019. Whilst this indicates a significant drop in pedestrian activity in Rainham over this period, the figure for Greater London is actually even more concerning (-17.6%).

The monthly footfall data (January 2021 – June 2023) can be seen in the graph below. Pedestrian activity has been variable during this period, with October through to January providing lows and the summer months offering the peaks. This could reflect the draw of the National Trust owned Rainham Hall. Overall, the trend is positive with a growth in footfall across this period, and the most recent month recorded (June 2023) being the high point (120,000).

Figure 6.2: Rainham – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Rainham is located in Zone 10 of the Study Area (its 'home zone'). It draws most of its trade from this zone and adjoining Zone 9 (Dagenham), although the survey also suggests some inflows from further afield.

Frequency of visit is relatively low with only just over 50% visiting at least once a month. This is likely to reflect the proximity of competing centres.

Table 6.1: Frequency of Visits to Rainham

Frequency of Visit to Rainham District Centre (Q28)	% Respondents
Daily	2%
4-6 days a week	3%
2-3 days a week	15%
One day a week	20%
At least once a week	39%
Every two weeks	8%
Monthly	4%
At least once a month	52%
Once every two months	6%
Three-four times a year	7%
Once a year	1%
Less often	2%
Never / don't Know / Varies	34%
Total	100%

Source: Household Survey, Q28

Use of Centre:

Food shopping is the main reason for visiting the centre, reflecting the large Tesco store located there. However, the F&B offer is also a key draw followed by the shopping offer in general.

Table 6.2: Main Reason for Visiting Rainham

Main Reason for Visiting Rainham District Centre (Q29)	% of Respondents using the Centre
Food shopping	44.3%
Visit cafés, restaurants, and takeaways	19.4%
Shopping in general	14.1%
Visit community services e.g. library, GP, etc.	6.4%
To meet family/ friends	5.0%
Non-food shopping	2.8%
Visiting financial services e.g. banks, building society etc	2.8%
(Don't know)	2.8%

Source: Household Survey, Q29

Customer Views:

Proximity to home is the main reason for liking the centre, but the proportion of respondents mentioning this is relatively low. Instead the attractive environment and quality of the retail offer are important draws.

Table 6.3: Main Likes about Rainham

Main Likes about Rainham District Centre (Q30)	% of Respondents using the Centre
Close to home	20.2%
Attractive environment / nice place	9.3%
Good food stores	5.1%
Familiar / know where everything is	3.7%
Quiet	2.8%
Safe and secure	2.8%
Good atmosphere / friendly people	2.4%
Lots of events	2.4%
Good range of non-food shops	2.3%
Traditional	1.8%
Easy to park	1.4%
(Don't know)	35.5%
(Nothing)	20.7%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- As well as the Tesco, the centre includes two convenience stores, estate agents, betting shops, a bank, a footwear store, a second hand furniture shop and takeaway restaurants, with the majority of units occupied by independent retailers;
- There are a number of gaps in the retail provision, including café and restaurant provision and clothing retailers;
- There are a number of vacant units on Upminster Road;
- A new library is a positive addition to the centre;
- The centre benefits from its setting within the Rainham Conservation Area;
- Pedestrian activity was generally low, while Tesco appearing to be trading well;
- The centre is served by 4 bus routes and a train station;
- Pedestrian navigation has been enhanced by way finding directional signage;
- The centre has two main car parks (Tesco and the train station).

The study concluded that '*Rainham district centre is performing adequately: the Tesco store appears to be trading successfully and offers an extensive product range. The recently completed Rainham Library is evidently a positive addition to the centre. There are no areas of significant concern in respect of the performance of the centre*'.

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement* (March 2018)** which recorded the following uses[19] within the town centre:

[19] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Table 6.4: Rainham Diversity of Uses, 2018

	Rainham Town Centre		Rainham Primary Frontage		Rainham Secondary Frontage	
Total Units	**42**	**100%**	**30**	**100%**	**12**	**100%**
A1	17	40%	14	47%	3	25%
A2	11	26%	7	23%	4	33%
A3	4	10%	3	10%	1	8%
A4	2	5%	0	0%	2	17%
A5	6	14%	4	13%	2	17%
Sui Generis (Other)	0	0%	0	0%	0	0%
Sui Generis (Betting Shops)	2	5%	2	7%	0	0%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	0	0%	0	0%	0	0%
D2	0	0%	0	0%	0	0%
B1	0	0%	0	0%	0	0%
Vacant	0	0%	0	0%	0	0%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses

Experian Goad do not survey Rainham but the Council's 2022 Town Centre health checks shows the following breakdown of uses in December 2022:

- Convenience – 15.0%
- Comparison – 12.5%
- Services – 42.5%
- Leisure – 23.0%.

Comparing this with 2019 data suggests a small decline in the comparison offer (from 14.3%) and an equivalent increase in leisure provision (was 28.6%).

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Council data suggests that the centre contained just 8 national multiples (defined as being part of a network of nine or more outlets) as of December 2022, a reduction of 1 from 2019. The key retailers include Tesco (Extra), Pizza Hut and Coral. These national brands will act as a key driver for visits to Rainham town centre.

Food & Beverage Provision

The centre has a reasonable F&B offer with cafes, takeaways and public houses all provided within the centre

Other Key Town Centre Uses

Rainham is only a small centre which benefits from a Post Office located a short distance outside, however, with Barclays bank closing its branch along Upminster Road South in 2021, there is now a lack of financial and banking services in the centre.

The centre provides a library and has the added draw of Rainham Hall, a National Trust property. A new leisure centre with swimming pool opened within the centre in July 2023.

Conclusions on Diversity of Uses:

Rainham is a small centre which in floorspace terms is dominated by the Tesco Extra which provides a significant convenience offer in the centre. In contrast comparison provision is limited but the services offer is high. Other town centre uses provide an important draw.

Evening / Night time economy

As a smaller district centre, any evening or night time activity will be linked to the F&B offer in the centre. This is relatively limited but the range is reasonable including cafes, takeaways and public houses.

Vacancies

Vacancy data provided by the Council has been analysed to understand the current vacancy situation in Rainham. The data accounts for the period of January – March 2020 through to July – September 2023.

The data can be summarised as follows:

- For the period of July to September 2023, there were 3 vacancies in the area which represents a vacancy rate of 7%.
- Since January - March 2020, the vacancy rate for Rainham has increased from 4.7%, which represents one additional vacant unit.
- The latest vacancy rate is lower than both the London average (9.5%) and National UK average (10.9%).

Changes in Representation and Market Demand

Council data suggests that there have been relatively few changes to either national multiple or independent representation in the centre in the last 3 years. During that time leisure representation has increased slightly whilst the comparison offer has declined proportionally.

Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below. This lists all retailers who have indicated a requirement for Rainham or the general area. As a result the list should not be interpreted as meaning all the companies listed would be interested in opening an outlet in Rainham town centre. However, it does suggest some interest from comparison retail operators[20].

[20] The Requirements List September 2023

Table 6.5: Retailer Requirements List, Rainham

Name	Description
Toolstation	Tools & Building Supplier
Lidl	Supermarket
The Works	Discount Retail Chain
Co-op Funeralcare	Funeral Director
The Range	Home, Garden and Leisure
ECigWizard	Electronic Cigarette Retailer

Source: The Requirements List September 2023

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 6.6: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%
- Secondary high street yields - 12%

Accessibility

Public Transport:

Public transport provision in Rainham comes in the form of buses and National Rail trains.

Rainham train station is located on the southwestern edge of the district centre and provides c2c services running east to Grays and west into Central London along the Essex Thameside line. Trains run frequently with up to three per hour during peak times. Services into London are roughly 25 minutes in travel time. Bus services offer connections to places such as Romford, Barking and Lakeside Shopping Centre and can be picked up from the train station and along Broadway and Viking Way.

Car Accessibility:

Parking in Rainham is limited, with the main provision at Tesco. There is a small car park at the railway station for those travelling by train, but with Viking Way Car Park closing due to the construction of Rainham Leisure Centre, there is a heavy reliance on some on-street parking along Upminster Road with capacity for around 25 vehicles. Pay and display machines are available for this.

Pedestrian Accessibility:

Pedestrian access and safety within the centre is fair with pavements found on both sides of the main road, although they can be narrow in parts, particularly near the train station and along Upminster Road South. There is a crossing point on Upminster Road South with tactile paving and a dropped kerb to provide aid to those with disabilities or pushchairs, as well as a zebra crossing on the B1335 near to The Pheonix pub.

Cycle Accessibility:

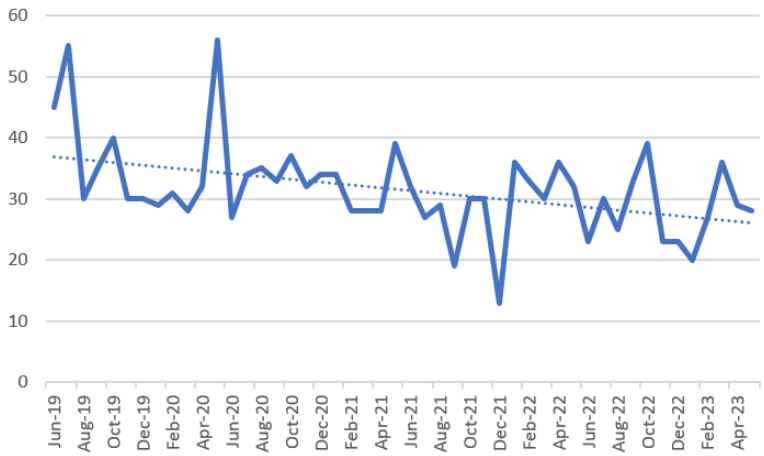
Cycle Parking can be found at Rainham station which has a secured facility for commuters, as well as at Rainham Library and the historic centre itself.

Perception of Safety and Occurrence of Crime

A central postcode within Rainham was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, a steady decrease in criminal activity has been recorded in this time. From peak months that saw over 50 crimes recorded, the area now averages around 25 crimes per month.

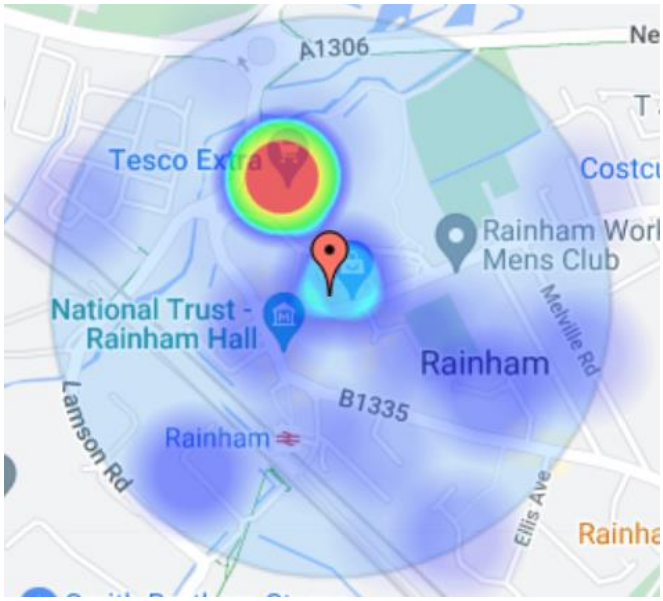
Figure 6.3: Total Crime Incidences, Rainham, June 2019 – May 2023



Source: UKCrimeStats

The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, the Tesco Extra is the focal point of where criminal activity has occurred during the reviewed period. The main types of crime are anti-social behaviour, violence and sexual offences and vehicle crime.

Figure 6.4: Crime Heat Map, Rainham



Source: UKCrimeStats

Environmental Quality

The environmental quality of Rainham District Centre is good, with a decent amount of street furniture, traditional buildings that are well-kept and natural elements of greenery around.

Characterful lamp posts line both sides of the roads, making the area safer in the evenings and early mornings. Greenery in the area is boosted by St Helen and St Giles Churchyard and the area to the west of Bridge Road, which is then supplemented with some trees lining the pavements and several planters dotted around the centre. Features such as Rainham Clocktower and Rainham Hall and its community garden add character and charm to the area.

Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches can be found in several parts of the centre to support those who wish/ need to rest.

Investment Plans and Development Opportunities

Whilst investment in the retail offer in Rainham has been limited, the centre has seen the recent opening of a new swimming pool and leisure centre. The library is also relatively new.

Further investment is also planned in the wider area, with Rainham District Centre identified as being within an Opportunity Area in The London Plan and Policy 2 of the Local Plan promoting development in the Rainham and Beam Park Strategic Development Area. The policy also supports the redevelopment of undesignated sites in Rainham District Centre.

Barriers to Business

The current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in Rainham, but the limited number of vacant properties could also restrict new entrants from opening.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to Rainham town centre:

- The Rainham BID area sees large numbers of people coming in to work but there is no connection between this area and the district centre
- Rainham is stuck in a time warp
- There is huge potential for pedestrianisation and more buses from the BID to the town centre
- The centre has no identity from a retail perspective
- Any centre needs a variety of offer – market days, WFH premises, leisure etc

Public consultation[21] has also provided the following public feedback:

- Strengths:
    - Rainham has a distinctive landscape and built character, including locally valued assets such as Rainham Hall, Rainham Parish Church and the historic buildings along the High Street.
    - Rainham has a distinct village identity which local people value.
    - There is a new leisure centre opening soon, which residents are looking forward to.
    - The Church and Library are key community assets and these should be protected.
    - The playground between Rainham High Street and Tesco is a good example of effective public space.
    - People enjoy the quality and range of shops in Rainham centre.
    - Tesco in Rainham is a strong asset and has good parking facilities.
- Issues:
    - Residents highlighted that litter in Rainham can be distracting and is ruining the public realm.
    - The village centre has changed over recent years, with the loss of traditional pubs and introduction of bars etc.
    - Safety and anti-social behaviour is a concern in Rainham, especially referring to use of the park at night.

SWOT Analysis

Strengths

- Strong convenience anchor (Tesco Extra)
- Attractive environment including Conservation Area and National Trust property
- Range of non-retail uses including new leisure centre and swimming pool
- Centre popular with local residents
- Low vacancy rates

Weaknesses

- Disconnect between Tesco Extra and historic centre
- Limited comparison offer
- Lack of linkage with employment locations in the area
- Lack of financial and banking services and recent closure of only bank

Opportunities

- Large workforce in Riverside BID area
- Rail links
- Increased tourism draw

[21] Havering Characterisation Engagement, Stage 1

Threats

- Loss of Post Office
- Excessive competing retail provision at Beam Station rather than complementary offer
- Competition from other centres or online shopping further reducing retail (comparison offer)

Conclusions

Although Rainham is a relatively small centre, it has many positives, including a strong convenience anchor and recent investment in cultural and leisure facilities. The historic part of the centre also provides an attractive setting including Rainham Hall.

However, the centre has recently seen the closure of the only bank and it seems that transport links between the centre and the key employment areas within the Riverside BID area are limited. Improvements to this offer the potential to increase footfall within the centre. This could also support the comparison offer which is very limited.

UPMINSTER

Description

Upminster is located in the south eastern part of the borough with the district centre focused around the junction of the A124 and B1421 to the south of the rail and underground station.

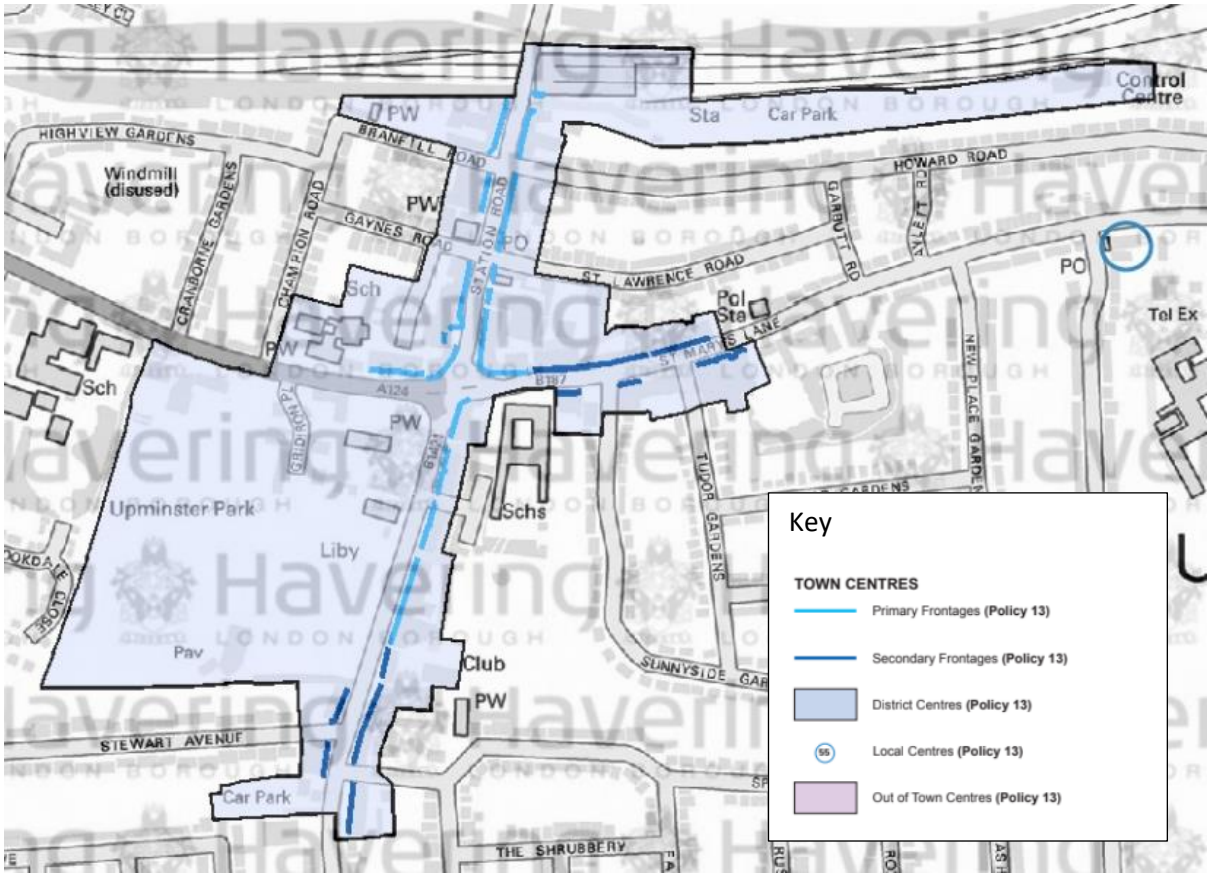
The main retail frontage extends south along the B1421 from the station, with secondary frontages at the far south and along St Marys Lane.

The centre area is relatively large and includes areas of surface car parking and Upminster Park.

Current Designation:

Upminster is defined as a District Centre in The London Plan 2021 and the Havering Local Plan 2016-2031. It is therefore a second-tier centre in the London Borough of Havering.

Figure 7.1: Upminster Town Centre



Source: Havering Local Plan Policies Map

Current Planning Policies / Designations:

- Upminster is identified as having low commercial growth potential and medium residential growth potential in The London Plan.

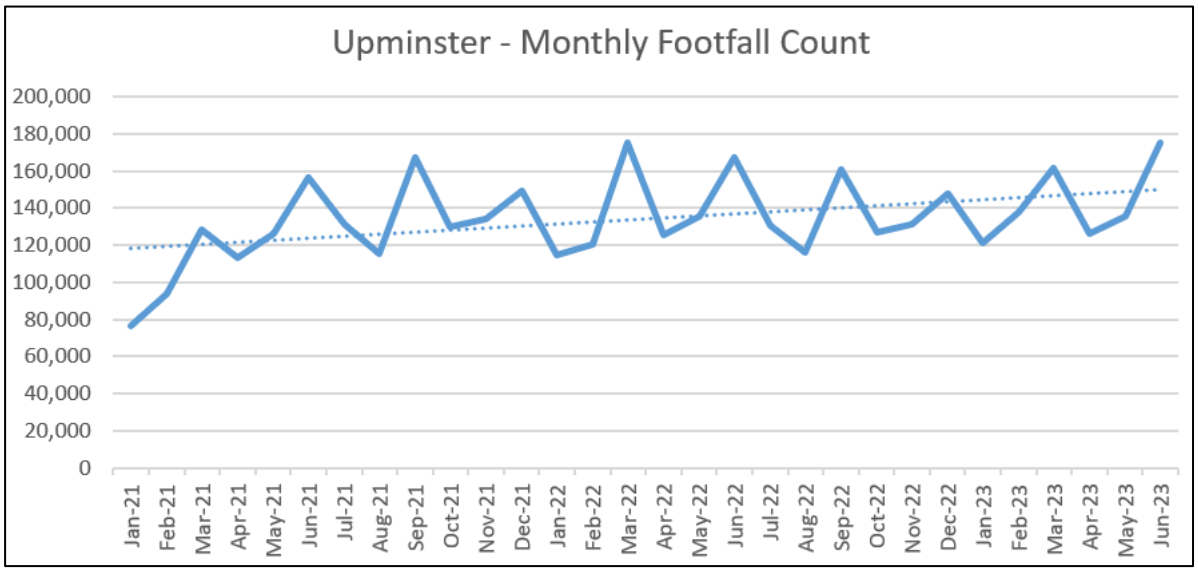
Footfall:

The Council have provided two sets of footfall data. The first sets out a pre- and post- pandemic (2019 vs 2022) comparison whilst the second outlines monthly footfall figures from January 2021 through to June 2023.

The 2019 vs 2022 pre- and post-pandemic data shows that footfall levels were 4.5% lower in 2022 than 2019, which represents a much smaller decline than can be seen for Greater London (-17.6%).

The monthly footfall data (January 2021 – June 2023) can be seen in the graph below. Pedestrian activity during this period has been relatively stable, with the trendline showing some growth. January 2021 was the lowest month recorded (77,000) whilst March 2022 and June 2023 provided the peak figures (175,000).

Figure 7.2: Upminster – Monthly Footfall Count (January 2021 – June 2023)



Source: Council Data

Catchment Area:

Upminster is located in Zone 5 of the Study Area (its 'home zone'), although this zone also covers the more rural areas to the east and south. Most of the residents using the centre live in the home zone, but some trade inflow comes from the adjoining zones of Zones 2 (Hornchurch) and Zone 11 (Brentwood).

The centre is visited on a regular basis, with over 60% of respondents visiting at least once a week. Very few respondents (15%) who indicated this was their closest centre, never visit.

Table 7.1: Frequency of Visits to Upminster

Frequency of Visit to Upminster District Centre (Q28)	% Respondents
Daily	2%
4-6 days a week	3%
2-3 days a week	15%
One day a week	20%
At least once a week	39%
Every two weeks	8%
Monthly	4%
At least once a month	52%
Once every two months	6%
Three-four times a year	7%
Once a year	1%
Less often	2%
Never / don't Know / Varies	34%
Total	100%

Source: Household Survey, Q28

Use of Centre:

The centre is primarily visited for shopping purposes, with the food shopping the main draw. However, a significant minority also visit to access the public transport services, reflecting the central location of the rail and underground station.

Visits to access the F&B offer and services are also important.

Figure 7.2: Main Reasons for Visiting Upminster

Main Reason for Visiting Upminster District Centre (Q29)	% of Respondents using the Centre
Food shopping	33.1%
Shopping in general	20.6%
To access public transport services e.g. park and ride, bus stop, bus station, rail station	12.8%
Visit cafés, restaurants, and takeaways	9.1%
Non-food shopping	5.3%
To meet family/ friends	4.5%
For work/ business	4.1%
Visiting personal services e.g. hair salon, barber, beauty salon etc	3.3%
Visit other services e.g. travel agent, estate agent, etc	2.5%
Visit sports and fitness venues	2.1%
(Don't know)	0.0%

Source: Household Survey, Q29

Customer Views:

The centre is generally liked by respondents, with only 6.6% indicating there is nothing they like. 'Close to home' is the single most cited 'like', both the attractive environment / nice place is mentioned by 23%. Other aspects of the offer are also mentioned positively.

Table 7.3: Main Likes about Upminster

Main Likes about Upminster District Centre (Q30)	% of Respondents using the Centre
Close to home	26.9%
Attractive environment / nice place	23.2%
Good range of non-food shops	15.8%
Good pubs, cafés or restaurants	11.4%
Safe and secure	11.1%
Easy to park	8.9%
Good public transport links	6.5%
Good food stores	6.0%
Compact	4.6%
Makes a change from other places	4.1%
Familiar / know where everything is	3.5%
Clean streets	3.5%
Quiet	3.1%
Good facilities	3.0%
(Don't know)	9.9%
(Nothing)	6.6%

Source: Household Survey, Q30

Previous Retail Study Findings

Changes in a centre over time can be an important indicator of the overall health of that centre and inform a judgement as to whether it is improving or declining, particularly when assessed against national trends. The starting point for this assessment is therefore to consider the previous health check for Romford, which was provided in the *Havering Retail & Commercial Leisure Needs Assessment 2015* (HRCLNA). Key findings relevant to the current study are that in 2015:

- The centre contains a good mix of commercial, civic and residential uses which contribute to the centre's vitality;
- The retail offer is geared to meeting the day to day needs with a range of comparison, convenience and service retail uses;
- The convenience offer is diverse, including both high-end (Waitrose, M&S Simply Food) and budget foodstores (Aldi, Iceland) as well as a range of independent convenience shops;
- The comparison offer accounts for 24% of all units and is in the mid-range of the market;
- There only a handful of national comparison multiples including Clarks, Superdrug and Boots;
- The Roomes department store acts as an anchor store to the northern part of the centre, while the foodstores anchor the central and eastern ends;
- The Waitrose does not appear to be encouraging strong levels of pedestrian flow from the rest of the centre, partly due to the poorer quality of the retail offer on St Mary's Lane;
- The vacancy rate in the centre is low at 7%, although this represents an increase from the 5% recorded by Experian Goad in 2013 and there is a small concentration of vacant units at the junction of the B1421 and St Mary's Lane;
- The leisure offer comprises the local leisure centre and a number of independent and national chain eating and drinking outlets which are mostly positioned in the middle of the market;
- The environmental quality is good in most of the centre which contains a mix of architectural styles reflecting civic and commercial functions. However, the environmental quality of the junction of the B1421 and St Mary's Lane is poor: the heavy traffic reduces safety and acts as a barrier to the flow of pedestrians.

The study concluded that '*whilst Upminster generally benefits from positive vitality and viability there is some scope for improvement in the quality of the retail offer and for the centres to be better integrated through upgrading of the public realm*'.

The diversity of uses within the centre was also considered in the **Havering Local Plan *Town Centre Position Statement*** **(March 2018)** which recorded the following uses[22] within the town centre:

Table 7.4: Upminster Diversity of Uses, 2018

	Upminster Town Centre		Upminster Primary Frontage		Upminster Secondary Frontage	
Total Units	**181**	**100%**	**99**	**100%**	**81**	**100%**
A1	102	56%	58	59%	44	54%
A2	18	10%	15	15%	3	4%
A3	29	16%	14	14%	15	19%
A4	2	1%	2	2%	0	0%
A5	17	9%	2	2%	14	17%
Sui Generis (Other)	6	3%	3	3%	3	4%
Sui Generis (Betting Shops)	2	1%	2	2%	0	0%
Sui Generis (Pay day loans)	0	0%	0	0%	0	0%
D1	1	1%	0	0%	1	1%
D2	0	0%	0	0%	0	0%
B1	0	0%	0	0%	0	0%
Vacant	4	2%	3	3%	1	1%

Source: LB Havering Town Centre Position Statement March 2018

Diversity of Uses (September 2022)

The Experian Goad Plan for Upminster covers a similar area to the defined district centre and therefore survey results on the diversity of uses and vacancies would be expected to be similar.

A summary of the centre offer in September 2022 shows that provision is similar to the UK average. A higher proportion of floorspace is devoted to convenience sales and retail service, with leisure services and comparison retail slightly below average.

Table 7.5: Experian Goad Diversity of Uses, Upminster

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Upminster	UK Average		Upminster	UK Average
Comparison Retail	43	23.2%	26.8%	8,528	28.5%	30.1%
Convenience Retail	18	9.7%	9.3%	7,367	24.6%	15.5%
Retail Services	40	21.6%	15.8%	4,023	13.4%	7.2%
Leisure Services	59	31.9%	25.5%	7,163	23.9%	26.4%
Financial & Business Service	13	7.0%	8.7%	1,366	4.6%	6.5%
Vacant	12	6.5%	13.8%	1,524	5.1%	13.7%
Total	185	100.0%	100.0%	29,971	100.0%	100.0%

[22] The Use Classes are those applicable at the time of the survey. This provides a more detailed breakdown of uses than the 2020 Use Classes that now apply. Class E would now cover A1, A2 and A3 uses but the two Use Class categories are not directly comparable.

Source: Experian Goad

This is confirmed by the Council's 2022 Town Centre health checks which also shows that leisure uses have increased since 2019 whilst the number of comparison outlets has declined. There has also been an increase of 2 convenience units.

Key National Multiples

National multiples are generally attracted to the higher order town and district centres in an area and their presence can provide an indication both of the extent of a catchment area and the health of a centre and its longer term prospects, from a retailer perspective.

It is also the case that as a retailer provides a more specialist or higher value offer, then they need to have larger catchment population to trade successfully and so will only be attracted to the larger retail centres. This means that the presence or absence of particular retailers can provide an indication of the draw of a centre and how it is being viewed by the retail and F&B operators.

Experian Goad identified 36 national multiples (defined as being part of a network of nine or more outlets) in Upminster at the time of their most recent survey (September 2022).

In terms of units, Comparison and Financial & Business Services national multiples are under represented when compared to the UK average, whilst Convenience and Leisure Services national multiples have a higher representation in Upminster than the UK average.

National multiples in Upminster include M&S (Simply Food), Aldi, Costa Coffee, Pizza Express, Prezzo and Greggs. These national brands act as key draws for visits to the centre.

Food & Beverage Provision

The centre has an above average proportion of F&B units, with cafes, fast food & takeaways and restaurants all better represented. The provision of licensed premises however is below average.

Table 7.6: Food & Beverage Breakdown, Upminster

Type of Use	Number	% All Town Centre Outlets	% UK Outlets
Bars & Wine Bars	1	0.5%	2.3%
Cafes	16	8.7%	5.0%
Fast Food & Takeaways	19	10.3%	6.1%
Public Houses	2	1.1%	2.6%
Restaurants	14	7.6%	4.9%
Total	52	28.2%	20.9%

Source: Experian Goad

Conclusions on Diversity of Uses:

Upminster district centre has a good and diverse retail and service offer, with the convenience and F&B offer being particularly strong.

The draw of the independent Roomes department store is likely to be particularly important in that it provides the centre with a unique offer.

Other Key Town Centre Uses:

Other town centre uses within the centre are relatively limited. There is a library at the southern end of the centre and Upminster Park provides outdoor sports and leisure facilities.

Evening / Night time economy

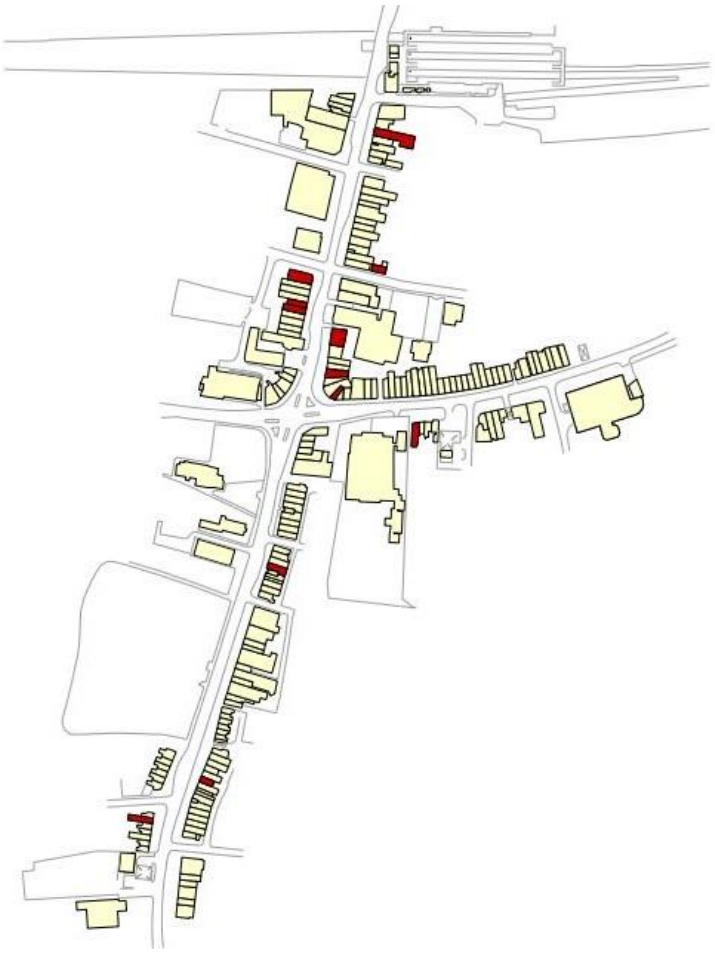
The centre has a strong F&B offer but limited other facilities to support a night time economy. However, this is not unusual for the size of centre.

Vacancies

Experian Goad vacancy rates (September 2022) in the centre are very low both in terms of the number of units and floorspace. Current levels are close to those seen in 2019, although vacancies increased during 2020 - 2021 in line with national trends.

Vacancies are dispersed throughout the centre and there is no obvious cluster that could point to a failing art of the centre.

Figure 7.3: Experian Goad Vacancy Map, Upminster



Source: Experian Goad

Vacancy data provided by the Council has been analysed to further understand the current vacancy situation in Upminster. The area that this data covers is similar to that of Goad. The data accounts for the period of January – March 2020 through to July – September 2023.

The data can be summarised as follows:

- For the period of July to September 2023, there were 11 vacancies in the area which represents a vacancy rate of 6.3%
- Since January - March 2020, the vacancy rate for Upminster has fallen from 9% (16 units). There was a consistent decline in vacant units up until January – March 2023 (7 vacant units/ 4% vacancy rate). Vacancies have increased slightly since then.

- The latest vacancy rate is comfortably lower than both the London average (9.5%) and the National (UK) average (10.9%).

Changes in Representation and Market Demand

Council data indicates that there has been some changes to both the multiple and independent provision within the centre since 2019 with 3 multiples closing. Churn in the independent sector is also noted, although overall the number of businesses is increasing and further openings are expected.

Market demand for representation in the area is recorded for Lidl, although this is a more general requirement for North East London[23].

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Table 7.7: Commercial Rental Levels in Havering

Centre	Estimated Zone A rate
Romford	£110-120
Collier Row	£40-45
Elm Park	£20-25
Harold Hill	£30-35
Hornchurch	£50-55
Rainham	£25-30
Upminster	£40-45

Source: LSH In-house research

In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields - 6.75%
- Good secondary high street yields - 9%

[23] The Requirements List September 2023

- Secondary high street yields - 12%

Accessibility

Public Transport:

There is a strong provision of public transport in Upminster with various bus services running along Station Road and beyond and Upminster railway station located to the northern edge of the district centre.

Bus services are frequent and can be used for connections to places such as Romford, Ockendon and Hornchurch. Upminster railway station is served by Underground, Overground and National Rail lines. The Underground (District Line) allows for travel to Central London, the Overground is a short line running to and from Romford and National Rail services can be used to get to Grays and Southend to the east and Central London to the west.

Figure 7.4: Upminster Station

Source: LSH Site Visit

Car Accessibility:

There is a good provision of car parks in and around Upminster District Centre. There are over 750 parking spaces across five car parks, with the Upminster Train Station Car Park accounting for more than half of those spaces. Roomes Car Park is to the north of the centre and can be accessed via Branfill Road. Wilson Close Car Park is the most central parking facility with around 91 parking spaces whilst Upminster New Windmill Hall Car Park can be found to the west, accessed via St. Mary's Lane. Hoppy Hall Car Park is located to the south of the centre with over 100 parking spaces to the rear of the Shell garage.

Some on-street parking can be found conveniently located along the B1421 with pay and display machines present.

Pedestrian Accessibility:

Pedestrian access and safety within the centre is good with wide pavements found on both sides of the roads. There are traffic light stops with tactile paving and dropped kerbs to aid to those with disabilities or pushchairs, particularly at the Station Road/ B187/ B1421/ A124 junction. Pedestrian islands are also present here to aid pedestrians when navigating this busy junction. The size of the

junction and signal phasing however makes it challenging for pedestrians. The junction can take up to three different three green man phases to safely cross over.

Several side streets that join onto Station Road have raised roads to create a flat crossing for pedestrians, which also acts as a traffic calming measure.

Cycle Accessibility:

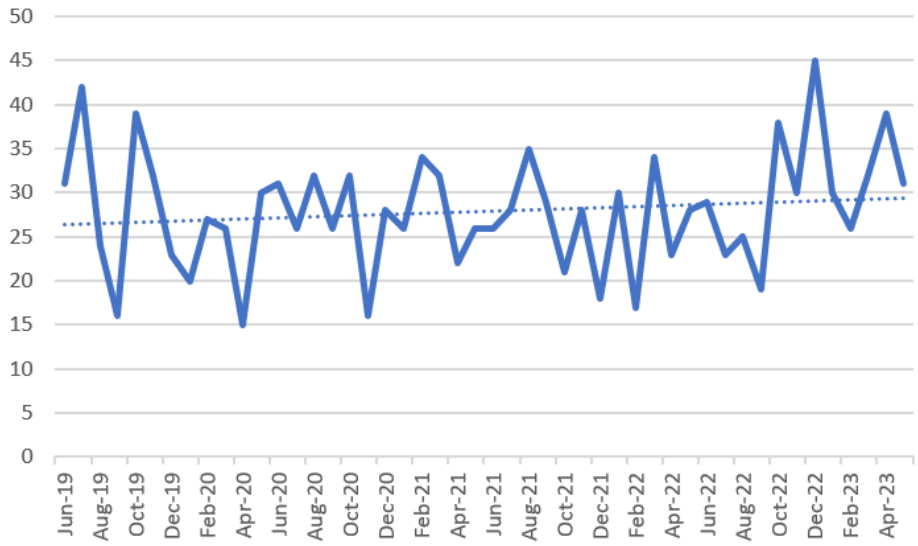
Upminster Station has plenty of cycle parking both along Station Road close to the station as well as in the car park around the back of the station itself. Cycle parking can be found along Station Road from the train station all the way down to the Bell Corner Junction at regular intervals providing access to the shopping parades. Cycle parking can also be found along the shopping parade further south of that junction along Corbets Tey Road.

Perception of Safety and Occurrence of Crime

A central postcode within Upminster was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The Figure below shows the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

As can be seen, whilst crime rates have fluctuated over this time from month to month, in terms of average trends, there has been little change over the four years. A peak of 45 crimes were recorded in December 2022.

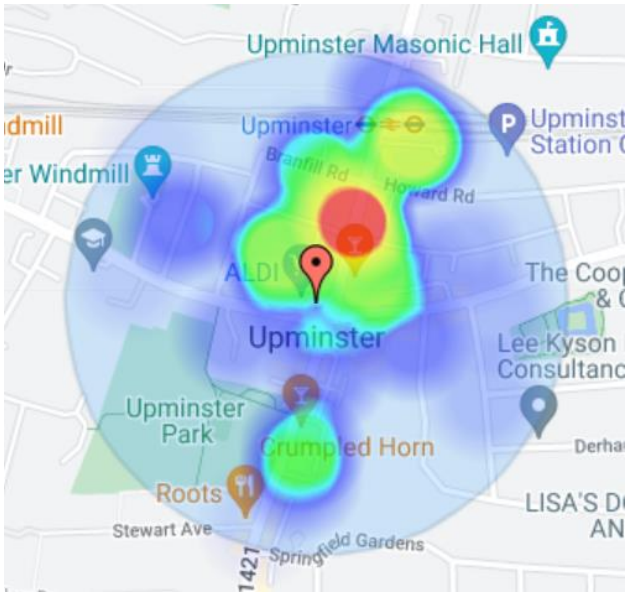
Figure 7.5: Total Crime Incidences, Upminster, June 2019 – May 2023



Source: UKCrimeStats

The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, the most common location for criminal activity has been around the Station Road/ Gaynes Road/ St Lawrence Road junction. The main types of crime recorded shoplifting, anti-social behaviour and violence and sexual offences.

Figure 7.6: Crime Heat Map, Upminster



Source: UKCrimeStats

Environmental Quality

The environmental quality of Upminster District Centre is good, particularly to the south where Upminster Park provides greenery and open space for visitors to enjoy.

Characterful lamp posts line both sides of the roads, making the area safer in the evenings and early mornings. Upminster park provides open green space with playing fields and facilities for activities such as a children's play area, outdoor gym equipment, table tennis tables and tennis courts. Along with Upminster Park, trees and planters scattered along the pavements and leisure outlets using planted dividers for their outdoor areas help to create a welcoming and inviting green centre.

Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches can be found in various locations as can bike racks which makes the centre more accessible for those cycling in.

Figure 7.7: Upminster Park

Source: LSH Site Visit

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Upminster at the present time.

Barriers to Business

The limited number of vacancies in the centre could be a barrier to some new entrants as choice of unit size and location will be limited. However, the current economic climate and cost-of-living crisis is likely to provide the main barrier to new businesses setting up in Upminster.

Stakeholder Feedback

Public consultation[24] has provided the following public feedback:

- If Roomes department store closes it will be a risk for Upminster.

SWOT Analysis

Strengths

- Popular centre
- Good rail and underground links
- Various convenience anchors
- Strong independent sector including Roomes department store
- Strong footfall
- Low vacancies
- Good range of retail, service and leisure uses

Weaknesses

- Shopping areas split by through traffic

Opportunities

- Ability to widen offer and build on existing positive feedback
- Strengthen evening economy offer

Threats

- Further changes to WFH patterns which could reduce commuter footfall
- Closure of Roomes department store

Conclusions

Upminster is a popular and successful district centre with a good range of retail, service and leisure uses and strong convenience anchors.

The independent offer is also strong and includes the Roomes department store.

Access for those arriving by either public transport or the private car is good but through traffic detracts from the overall offer.

The centre is currently performing well and the good recovery seen since the Covid-19 pandemic suggests that it is well placed to adapt to future town centre changes.

[24] Havering Characterisation Engagement, Stage 1