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1 INTRODUCTION

1.1 In May 2008, the London Borough of Tower Hamlets commissioned a consultant team comprising Renaisi, Roger Tym and Partners and Space Syntax to produce a Town Centres Spatial Strategy. As stated in the brief, this will “serve to update the Borough’s retail and town centre research base, inform the Local Development Framework and more fundamentally serve as a robust, well evidenced strategy for managing and improving the Borough’s town centres”.

1.2 This Retail & Leisure Capacity Study is part of the evidence gathering phase and is structured as follows:

- **Section 2** sets out the relevant national and local policies, both existing and emerging.
- **Section 3** provides an overview of the current shopping and leisure use patterns in the study area, utilising the findings of a household survey.
- **Sections 4-12** set out the baseline position for each centre, including results from in-centre surveys and trader consultation as well as centre healthchecks.
- **Section 13** provides an assessment of quantitative needs in the retail and leisure sectors in the study area up to 2020 and looks at the Borough’s capacity to provide new development.
- **Section 14** sets out our conclusions.

1.3 The recommendations are informed by survey work, consultation, and data from the Council and published sources. We acknowledge that any survey work has limitations if it relies on a sample and that data from published sources can sometimes miss local factors. However, we consider that, bearing in mind these limitations, the recommendations in this report are as robust as is reasonably possible.
2 POLICY CONTEXT

National Policy and Guidance

**PPS1**

2.1 Planning Policy Statement 1: Delivering Sustainable Development (PPS1, January 2005) sets out the Government's overarching planning policies on the delivery of sustainable development through the planning system. The following section is relevant to town centres and retailing:

- Developments that attract a large number of people, especially retail, leisure and office development, should be focused in existing centres to promote their vitality and viability, social inclusion and more sustainable patterns of development.
- To reduce the need to travel and encourage accessible public transport provision to secure more sustainable patterns of transport development, planning should actively manage patterns of urban growth to make the fullest use of public transport and focus development in existing centres and near to major public transport interchanges.
- To promote the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings, planning should seek actively to bring vacant and underused previously developed land and buildings back into beneficial use.

**PPS12**

2.2 PPS12: Local Spatial Planning (June 2008) explains that spatial planning is a process of place shaping and delivery, aiming to:

- Produce a vision for the future of places that responds to the local challenges and opportunities, and is based on evidence, a sense of local distinctiveness and community derived objectives, within the overall framework of national policy and regional strategies.
- Translate this vision into a set of priorities, programmes, policies, and land allocations together with the public sector resources to deliver them.
- Create a framework for private investment and regeneration that promotes economic, environmental and social well being for the area.
- Coordinate and deliver the public sector components of this vision with other agencies and processes.
- Create a positive framework for action on climate change.
- Contribute to the achievement of Sustainable Development.

2.3 It should be taken into account by local planning authorities in preparing development plan documents.
PPS6

2.4 Planning Policy Statement 6: Planning for Town Centres (PPS6, March 2005) maintains the Government’s key objective of promoting the vitality and viability of town centres. This is to be achieved through planning for their growth and focusing new development and services within town centres using the sequential approach to site selection.

2.5 PPS6 highlights that comprehensive, relevant and up to date monitoring is essential to the effective planning and management of town centres. It should be used to inform the review of site allocations and town centre policies, and enable early signs of change in town centres to be identified and appropriate action to be taken.

2.6 PPS6 also links the vitality and viability of town centres to the Government’s wider policy objectives of promoting social inclusion, ensuring that communities have access to a range of main town centre uses and promoting the growth of regional, sub-regional and local economies.

2.7 Annex A of PPS6 defines different types of centres:

“City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the ‘international’ and ‘metropolitan’ centres identified in the Mayor’s Spatial Development Strategy typically perform the role of city centres.

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority’s area. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the ‘major’ and many of the ‘district’ centres identified in the Mayor’s Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.”

Draft PPS6

2.8 The proposed changes to PPS6 were published in July 2008 and are open to consultation until October 2008. It is proposed to refine the policy approach to planning
for town centres in PPS6, rather than to make significant policy changes. It should be noted that there is no proposed change to the requirement for planning authorities to assess the need for new town centre development or to take account of scale, impact and accessibility considerations or the sequential approach in selecting sites for development in development plans.

2.9 The document proposes to remove the requirement for an applicant to demonstrate 'need' for a proposal which is in an edge of centre or out of centre location and which is not in accordance with an up to date development plan strategy. It proposes to introduce a new impact assessment framework for proposals outside of town centres which will:

- Place emphasis upon economic, social and environmental as well as strategic planning impacts, enabling positive and negative town centre and wider impacts to be taken into account.
- Identify key impacts which applicants must assess, including: impact on planned in-centre investment; whether the proposal is of an appropriate scale; and, impacts on in-centre trade/turnover which should take account of current and future consumer expenditure capacity.
- Identify a number of wider impacts which should be considered, including: accessibility and sustainable transport considerations; impact on traffic; effects on employment and regeneration; and how the proposal will make efficient and effective use of land.
- Require applicants to consider the appropriateness of the scale of development, and for local authorities to ensure that proposed locations for new development are accessible by a choice of means of transport and to consider the impact on car use, traffic and congestion arising from a proposal.
- Require applicants to consider design quality, including how the proposal will help mitigate the impacts of climate change.

2.10 The draft does not propose changing the sequential approach. They also include a requirement for proposals to be assessed on the extent to which they promote consumer choice and retail diversity.

2.11 The proposed changes also clarify what should be expected from impact assessments and have made it clear that judgements about the extent of any impacts should be informed by the development plan, local assessments of the health of town centres and any other relevant published local information.

2.12 To ensure consistency with the emerging PPS on planning for sustainable economic development, the changes also introduce references to the need for planning authorities to plan for sustainable economic growth, to have flexible policies which are responsive to change, and to take account of Regional Economic Strategies when planning for town centres, and town centre uses.

**Competition Commission Report**

2.13 On 9 May 2006 the Office of Fair Trading (OFT) referred to the Competition Commission (CC) the supply of groceries by retailers in the UK. On 31 October 2007 the CC published its provisional findings, which stated that it had found features of the groceries market that were resulting in an adverse effect on competition.

2.14 The CC has identified two principal areas of concern:
Several grocery retailers have strong positions in a number of local markets. Competing grocery retailers face a number of ‘barriers to entry’ to these local markets. Accordingly, consumers get a poorer retail offer in terms of prices, quality and service, while those grocery retailers with strong local market positions earn additional profits due to weak competition.

The transfer of risk and costs by retailers to suppliers through various supply chain practices which, if unchecked, will have an adverse effect on investment and innovation in the supply chain and ultimately suppliers.

To address these issues the CC recommends in its final report that:

- A competition test be applied as part of the planning process which will favour new entrants and retailers other than those with an existing significant market share.
- The provisions of the Supermarket Code of Practice are tightened so grocery retailers will be required to abide by its terms.
- Legally binding commitments from grocery retailers should be sought to establish an ombudsman to oversee the revised code.

The competition test has the most significance for the planning system. It is recommended by the CC that the OFT become a statutory consultee for all planning applications for grocery retail stores with a net floor space in excess of 1,000 sqm, in order that it can apply a competition test. The CC further recommends planning policy be amended so that where the test has been failed, LPAs should refuse the application, except where:

- The benefits that the development would bring to the local area will outweigh any detriment the proposed development will have upon the area becoming/remaining highly concentrated in terms of grocery retailing.
- The overall development would not take place without the involvement of the grocery retailer.

The test will be based upon fascias within a 10 minute drivetime of proposed new stores or store extensions, and will apply to planning applications made by both retailers and third parties (where no operator is identified). A particular retailer will pass the test if:

- It would operate the developed store as a new entrant in the local area (within the ten minute drivetime).
- The total number of fascias in the local area were four or more; or
- The total number of fascias were three or fewer and the grocery retailer operating the new store would have less than 60 per cent of groceries sales area in the local area.

A particular retailer would fail the test if:

- The grocery retailer was not a new entrant in the local area; and
- The total number of fascias in the local area were three or fewer; and
• The retailer would have 60 per cent or more of groceries sales area (including the new store) in the local area.

2.19 The OFT would then advise the LPA of its findings.

Regional Policy and Guidance

The London Plan

2.20 The London Plan (LP) of 2004 is the strategic plan setting out an integrated social, economic and environmental framework for the future development of London, looking forward 15-20 years.

2.21 Policy 2A.8 relates to town centres and states that;
• The vitality and viability of town centres should be sustained and enhanced;
• Road user conflict should be reduced.
• The needs of Londoners and improving the sustainability of London’s development should be met.

2.22 The Mayor strongly supports the development of a competitive retail sector and suggests that sites should be found which fulfil the requirements of the sequential test.

2.23 The LP suggests that DPD policies should:
• Identify future levels of retail and other needs in light of integrated local and strategic assessments and enable the supply of capacity to meet these.
• Develop and enhance the network of International, Metropolitan, Major, District and specialist centres.
• Identify more local and neighbourhood centres and those with distinct roles in meeting special needs.
• Seek close partnership working with retailers and other stakeholders to identify developments that will support delivery of this plan’s objectives, focusing it where practicable on town centres and where this is not practicable on the edge of town centres.

2.24 Policy 3C.19 is concerned with local transport and public realm enhancements and states that better use should be made of London streets and a comprehensive approach taken to tackling all the adverse transport impacts in an area. There is an urgent need to reduce congestion and traffic levels, particularly in those parts of London where they are at their highest, including central London and outer town centres. Boroughs should consider local initiatives that aim to reduce traffic, especially in town centres.

2.25 Policy 3D1, Supporting Town Centres states that the Mayor will and Boroughs should enhance access to goods and services and strengthen the wider role of town centres:
• Encourage retail, leisure and other related uses in town centres and discourage them outside the town centres.
- Encourage forms of development, operational practice and consumer behaviour which will help to reduce carbon dioxide emissions
- Improve access to and within town centres by public transport, cycling and walking
- Enhance the competitiveness and quality of retail and other consumer services in town centres
- Support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing and their key role in developing a sense of place and identity for sustainable local communities
- Require the location of appropriate health, education and other public and community services in town centres
- Designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area
- Encourage net additions to town centre capacity where appropriate to their role in the overall network
- Undertake regular town centre health checks and integrated strategic and local consumer need and capacity assessments
- Support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement Districts in appropriate locations and appropriate provisions to support the safety and security of town centres.

2.26 Policy 3D.2 Town centre development states that DPD policies should:
- Assess the need and capacity for additional retail, leisure, commercial and other town centre development and reconcile these by making appropriate provision following the sequential approach.
- Relate the scale of retail, commercial and leisure development to the size and role of a centre and its catchment and encourage appropriate development on sites in town centres in the network. If no town centre sites are available in the network, provision should be made on the edge of centres.
- Encourage additional comparison goods capacity in larger town centres and convenience goods capacity in smaller centres of appropriate scale, especially District centres, to secure a sustainable pattern of retail provision.
- Treat proposals for out of centre development or for intensification or expansion of existing out of centre retail facilities in line with Policy 2A.8.
- Manage existing out or edge of centre retail and other service provision in line with the sequential approach, seeking to reduce car dependency and traffic generation and to improve public transport access to promote more sustainable forms of development.

2.27 Policy 3D.3 states that Boroughs should work with retailers and others to prevent the loss of retail facilities, and to encourage mixed use development. Local retailing information should be established in collaboration with local communities and audits undertaken of local retail and service facilities identifying areas considered deficient in
convenience shopping and services. A policy framework should be provided for maintaining, managing and enhancing local and neighbourhood shopping facilities and, where appropriate, for the provision of further such facilities in accessible locations, including serving new residential communities, and the development and widening of access of e-tailing should be encouraged.

2.28 Annex 1 discusses the London Town Centre Network:

“London has a complex pattern of town centres. While each centre performs a different function according to the community and area it serves, five broad types of town centre can be identified within London. Each town centre type is described below.

- International centres (2) are major concentrations of a wide range of globally attractive, specialist or comparison shopping.
- Metropolitan centres (11) mainly in the suburbs, serve wide catchment areas covering several boroughs and offer a high level and range of comparison shopping. They typically have over 100,000 square metres of retail floorspace, including multiple retailers and department stores. They also have significant employment, service and leisure functions.
- Major centres (35) characteristic of inner London...are also important shopping and service centres, often with a borough-wide catchment. They are typically smaller in scale and closer together than those in the Metropolitan category. Their attractiveness for retailing is derived from a mix of both comparison and convenience shopping. Some Major centres, which have developed sizeable catchment areas, also have some leisure and entertainment functions. Major centres normally have over 50,000 square metres of retail floorspace.
- District centres (146) have traditionally provided convenience goods and services for more local communities and are distributed across London. Some District centres have developed specialist shopping functions, often as a result of their lower rents. Developing the capacity of District centres for convenience shopping is critical to ensure access to goods and services at the local level, particularly for people without access to cars. Many have a linear nature, which may need to be consolidated to make more efficient use of land and transport capacity.
- Neighbourhood and more local centres (over 1,200) provide services for local communities and are of cumulative strategic significance...neighbourhood shopping centres have a key role to play in addressing the problems of areas lacking accessible retail and other services.”

2.29 London’s Economic Development Strategy (2005) was prepared by the London Development Agency (LDA) on behalf of the Mayor of London. It sets out a plan for the sustainable, equitable and healthy growth and development of London’s economy to 2016.

2.30 The strategy states that London’s town centres have a central role to play in the future of London’s economy, and promoting the ‘polycentric’ pattern of development
envisaged in the London Plan. They have seen an increasing concentration of jobs in recent years. Many have significant capacity for development and to provide a range of job and other opportunities in the future - particularly for local communities. This in turn will help reduce the pressure on central London and its infrastructure, and will help promote an environmentally sustainable pattern of development.

2.31 Realising this potential will require:

- Coordinated and cooperative action by all stakeholders.
- Appropriate management at local level, including a proactive and strategic approach to monitoring the vitality of centres and identifying priorities for action.
- Town centre management.
- Environmental improvement.
- Use of business improvement districts where appropriate.
- Appropriate infrastructure.
- Planning policies promoting higher development densities and mixed uses.
- East London Sub-Regional Development Strategy

2.32 The purpose of the Sub-Regional Development Strategy (2006) in line with PPS12, is to provide guidance on the implementation of policies in the London Plan in order to help deliver a sustainable and prosperous future for the sub-region.

2.33 In terms of retail, the strategy states that, effectively and pro-actively planned, strong retail growth will be a major driver of town centre regeneration and, incorporated in mixed use development, provide opportunities to address other priorities including housing.

2.34 There is a need within East London for new retail space, in particular for comparison goods. Resident-based consumer expenditure in the sub-region is expected to increase by almost 50% between 2001 and 2016. Comparison goods expenditure could double from £4.2bn to £8.6bn and convenience goods expenditure is expected to increase but at a more modest rate of about 37% from £2.8bn to £3.8bn. The requirement for additional floor space is likely to be in the region of 120,000sqm to 204,000sqm for comparison goods between 2001-2016, and 28,000 sqm and 77,000 sqm of additional convenience space could be required (this does not take into account convenience goods proposals, estimated to be approximately 59,000 sqm).

2.35 Whilst these estimates are the best available at the sub-regional level, they need to treated with caution. Using their own local need assessments, Boroughs are encouraged to undertake fine grained assessments of need for new convenience floorspace taking into account qualitative need including the complexion of the existing retail offer, under/over-trading, accessibility and the potential for improvement of outmoded existing convenience floorspace.

2.36 In general, the key to achieving sustainable centres is likely to be a combination of private and public partnership working and mixed-use re-development. Such partnerships will be important in enabling site assembly, usually in connection with
more comprehensive town centre renewal schemes. This may entail the use of compulsory purchase procedures. Partnerships are also needed to help enhance and maintain the office, industrial and town centre environments, e.g. through Business Improvement Districts.

*London Wide Town Centre Health Checks 2006 Analysis*

2.37 The London Plan emphasises the strategic importance of town centres and sets out policies to maximise choice and promote sustainable access to goods and services. The Plan identifies five broad types of town centre within London: International, Metropolitan, Major, District and Neighbourhood centres.

2.38 The Health Checks in this study are the latest in a series undertaken in 1994 and 1999/2000. They are part of the wider town centre assessments undertaken by the Greater London Authority (GLA) in order to assess the network and make provision for future development requirements.

2.39 The report describes the Isle of Dogs as a district centre that is large in comparison to smaller major centres. Since this report was published, the Isle of Dogs (Canary Wharf) has been designated in the London Plan as a major centre.

*London Town Centre Assessment - Comparison Goods Floorspace Need*

2.40 The Greater London Authority (GLA) appointed Experian to develop a comprehensive picture of current and future comparison goods floorspace needs throughout London. This has involved estimating and forecasting spending on comparison goods in all centres in London identifying centres where the need for floorspace is greatest.

2.41 The study states that the (non-commuter) catchment area for Canary Wharf is relatively small when compared with neighbouring centres, with its penetration concentrated around the Docklands area. As a consequence, there is capacity for additional development there with minimal impacts on centres such as Woolwich and Stratford. Brick Lane falls into the top ten retail centres with estimated spare capacity.

*Local Policy and Guidance*

*Adopted Unitary Development Plan 1998*

2.42 Chapter 7 of the UDP relates to shopping. Tower Hamlets Council aim to support and encourage improved provision in the range and quality of shopping throughout the Borough whilst taking measures to ensure the continued viability of established district centres. The Council wishes to ensure that there is a reasonable range of shops within a short walking distance of all residents and that street markets are maintained and enhanced.

2.43 The Proposals Map of the Plan designates seven district centres; Bethnal Green, Chrisp Street Crossharbour, Roman Road (East), Roman Road (West), Watney Market and Whitechapel. Canary Wharf was not designated as a centre at this time.
Within existing centres planning applications for A1 retail development will normally be granted. The core area of centres should be retained in primarily shopping use. Non A1 uses may be favourably considered where they do not harm the character of these areas as prime shopping frontages, and do not detract from the function, vitality and viability of the centre. Outside the core area centres, consideration will be given to permitting other uses which will contribute to the viability and vitality of the shopping centre.

Applications for change of use from A1 outside of district centres and local parades may be favourably considered where, in the case of a vacant property, the applicant has demonstrated that the building has been actively marketed at values prevailing in the area for retail or laundrette re-use or redevelopment, or there is adequate provision within the locality for essential shops to meet local need, and proposed uses would not be detrimental to the amenity of residents.

Planning permission for new retail development outside existing centres will normally be given where there is no detrimental impact upon the vitality and viability of the existing centres, the development will be adequately served by public transport and includes safe and convenient facilities for pedestrians and cyclists.

Proposals for amusement arcades, restaurants, public houses, wine bars and take away hot food will be considered in the light of the amenity of near-by residents, on-street parking, free flow of traffic and adequate measures of ventilation. Proposals for minicab offices may be approved subject to the proposal having no detrimental effect upon the amenity of local residents or the free flow of traffic and road users, and no conflict with any other planning policy.

The Council will normally permit new shop fronts where their scale, design and materials are appropriate for the surrounding area.

The Plan’s definition of different types of centre is as follows:

- Major centres - shopping and service centres with a mix of uses, usually including at least 50,000sqm of retail floorspace, as well as cultural and entertainment facilities. May have a specialist role.
- District centres - ranging in size, providing convenience retail and service floorspace with comparison retail floorspace rarely exceeding 50% of the total. Again, some district centres have specialist functions.
- Neighbourhood - comprise a variety of convenience shops, with some comparison shops as well as local services. Have an important role in addressing the problems of areas lacking accessible retail and services.

The Core Strategy and Development Control Plan comprises Interim Planning Guidance for the purposes of development control in Tower Hamlets. This document has been subject to extensive public consultation and a sustainability appraisal.
Policy CP15 states that the Council seeks to protect shops used as local convenience shops to ensure all local residents have access to convenience shopping, and will encourage the provision of a wide range of shops, and support the offer of speciality commodities to meet the needs of local residents. The Council wishes to protect shops which offer these convenience goods and ensure that non-retail services do not take over and inhibit their provision.

Policy CP16 relates to the vitality and viability of town centres and states that the Council will seek to promote and enhance the distinctive role and functions of the town centre hierarchy through designating town centres; supporting retail and town centre related development within designated town centres; seeking active frontages within town centres and the Central Activities Zone (CAZ); promoting a complementary mix of uses; and guiding investment to strengthen centres that are in need of revitalisation.

Policy CP17 states that the Council will support evening and night-time activities focused towards Canary Wharf, West India Quay, Canary Riverside, Brick Lane, Whitechapel District Centre, Tobacco Dock and St Katharine Docks. Evening and night-time activities ensure town centres remain lively beyond shopping hours, as well as contributing to safety factors which help to sustain the vitality and viability of town centres. It is important to recognise that these activities can also have a negative impact, especially on the residents in the surrounding area, so that they can be managed appropriately.

Policy CP18 states that the Council will seek to protect and enhance the existing licensed on-street and off-street markets. Markets and street trading are an important element of retail provision in Tower Hamlets.

The City Fringe area of Tower Hamlets is expected to experience significant development and change over the next decade and beyond. The City Fringe Area Action Plan will ensure that growth is delivered to provide the maximum, long-term benefit for the Borough's communities and ensure the area's exceptional characteristics are recognised and protected or enhanced.

The City Fringe is characterised by a variety of traditional street markets catering to local ethnic groups and international tourism. These include the Columbia Road Flower Market, Spitalfields Market, Petticoat Lane Market, Whitechapel Market and Brick Lane Market. Brick Lane also has a mix of ethnic restaurants with Bangladeshi influence, and alternative fashion shopping characterises Commercial Road. Shops within the Central Activities Zone are not organised within traditional town centres, but comprise a larger variety, serving the businesses and other mix of uses in the CAZ. Spitalfields Market has reinvented itself from a wholesale fruit and vegetable market to a modern retail market with a variety of independent shops and restaurants serving international cuisine.
Aldgate and Spitalfields Market Sub-Area

2.57 The sub-area is located within the CAZ with other prominent activities including higher education, entertainment, leisure, tourism and retail uses. These activities are an important element of London’s economy, and the Council has a duty to protect and enhance the CAZ as well as ensuring these activities benefit the Borough and its residents.

2.58 The sub-area does not contain any town centres as such, but does include the CAZ Frontage at Wentworth Street. Policy CFR11 ensures that retail uses will be predominantly focused: within the Wentworth Street CAZ Frontage; on pedestrian routes around the tourist focus area at Spitalfields Market; and where they can provide active ground-floor frontages in redevelopments along Braham Street, Commercial Street, Commercial Road, Leman Street, Whitechapel Road and Whitechapel High Street.

St Katharine’s Sub-Area

2.59 St Katharine’s sub-area includes St Katharine Docks and the Tower of London. The sub-area does not contain a specific town centre, but rather a mix of retail and leisure uses that service other CAZ functions such as tourism and offices. Speciality and tourist shopping, and the evening and night-time economy uses, are scattered throughout St Katharine Docks.

2.60 Retail, tourism and the evening and night-time economy will be encouraged, particularly on the pedestrian route between the Tower Gateway public transport interchange and St Katharine Docks and the Tower of London as it makes a positive contribution to the vibrant character of these areas. Retail and leisure will be required to contribute positively to the vibrancy and safety of the area whilst respecting the historic nature of the area. Retail uses should support office uses in Preferred Office Locations by providing active ground floor frontages to increase pedestrian activity.

Wapping Sub-Area

2.61 The Wapping sub-area is located in the southeast of the City Fringe and borders the River Thames, St Katharine Docks and the Central Area of the Borough. Wapping is generally lower density than the rest of the City Fringe, with low levels of public transport accessibility in most of the sub-area.

2.62 It is expected that much of the retail need in the sub-area will be met by the existing retail provision at the Wapping Neighbourhood Centre, and at Watney Market District Centre. However, new provision of retail may be required to support the redevelopment at the News International site. Tobacco Dock is a prime location along the canal for evening and night-time economy uses, to serve tourists, workers and residents, and it can make a positive contribution to the vibrant character of the area. Impacts on new and existing residential communities will have to be carefully managed.

2.63 Policy CFR23 states that new retail development should be directed to the Wapping Neighbourhood Centre; additional complementary retail may be provided as part of
redevelopment elsewhere. Evening and night-time uses will be focused at Tobacco Dock, and retail and leisure uses should provide active uses along the canal.

**Banglatown and Brick Lane Sub-Area**

2.64 Brick Lane and Banglatown, the key retail areas within the sub-area, will be enriched through the reinforcement and diversification of the tourism, cultural and creative activities. The distinctive local townscape should be protected and enhanced through sensitive development to avoid past problems by respecting the amenity of residential communities. Evening and night-time uses will be directed to Brick Lane where improved access and servicing will ensure that a thriving evening and night-time economy can operate without an unacceptable impact on residential amenity.

2.65 Policy CFR29 states that in the Banglatown and Brick Lane sub-area new retail development will be focused in the Brick Lane Neighbourhood Centre and on large sites where retail is needed to support the development. Retail uses should only be provided in redevelopment where the retail is necessary to support the development and will not compromise the vitality and viability of existing town centres. Within the Brick Lane Restaurant Zone, new restaurant uses will be considered favourably to contribute to the evening and night-time economy.

**Whitechapel Sub-Area**

2.66 Retail is focused at the Whitechapel District Centre, along with fashion retail frontages on Commercial Road. The sub-area also benefits from the Watney Market Neighbourhood Centre in the Central Area of the Borough that adjoins Commercial Road. Proposals for new retail development should not detract from existing town centres in the Borough.

2.67 Policy CFR34 states that new retail development will be focused in the Whitechapel District Centre, active ground floor frontages will be sought on routes which have a large volume of foot-traffic, including Whitechapel Road and Commercial Road, and improvements that encourage pedestrian flow and enhancements to market tents at the Whitechapel Market will be supported.

**Weavers Sub-Area**

2.68 The Weavers sub-area is located in the very north of the City Fringe, and borders the London Borough of Hackney along Hackney Road. It is characterised by a series of residential estates interspersed with small areas of public open space, community uses and some declining retail along main corridors in need of rejuvenation.

2.69 Given this sub-area is largely residential in nature, minimal employment uses currently exist compared to other parts of the City Fringe. Retail areas are focused around the Columbia Road Neighbourhood Centre and retail frontages along Hackney Road. The specialist nature of the Flower Market needs to be protected for its unique value to the Borough as a tourist attraction.
2.70 The Isle of Dogs Major Centre (Canary Wharf) and the Crossharbour District Centre (anchored by an ASDA store) are located in the central part of the Island. Additionally, a number of smaller neighbourhood centres and local shopping parades are scattered throughout the Island, and these perform an important local convenience function for the community.

2.71 There is a need for a better choice of shops, including small and independent retailers like butchers and bakers, the ASDA site is under-utilised and there is a need for a high street for the Island.

**Crossharbour Sub-Area**

2.72 Crossharbour is located north of Mudchute Park and there are good public transport links with the Crossharbour Docklands Light Railway station to the west and bus services operating. The ASDA is here and meets the convenience retail needs of the central and southern parts of the Isle of Dogs.

2.73 Change will be promoted in this sub-area to create a lively community node focused on providing retail and community services to the Isle of Dogs. This will be achieved by promoting change in the town centre to maximise its growth and development potential. Future development in this sub-area will focus on mixed-uses, including retail, residential, community and leisure uses.

**Northern Sub-Area**

2.74 The Northern sub-area is the main focus of commercial development on the Isle of Dogs, and it provides a landmark location for major corporate occupiers that together form a significant business cluster. Beyond major office-based employment, the Northern sub-area also contains Canary Wharf which is the largest retail centre in Tower Hamlets and also a centre for leisure uses and the evening and night-time economy. Canary Wharf serves a substantial weekday worker population, and this is complemented by its attraction as a weekend shopping destination for an area well beyond Tower Hamlets.

2.75 Core Policy 16 (Vitality and Viability of Town Centres) identifies this location as a major centre and it is important that provision is made for the continued development and growth of the town centre role, to serve the worker and resident population. The retail and leisure uses add vitality and vibrancy to the public realm and help create mixed-use areas that can be accessed by all of the community.

**Central Sub-Area**

2.76 The Central sub-area is located between Canary Wharf and Crossharbour. It is not anticipated that significant retail development will occur, beyond that required to serve the existing and new communities within the area, as well as passing trade. However, the key to creating a vibrant area will be a diverse mix of uses that include, along with homes and employment space, eating and drinking establishments, small workshops,
arts and cultural centres, community facilities and sports facilities. This mix of uses should also ensure that active frontages to buildings and the docks are created.

**East India South & Southern Sub-Area**

2.77 The East India South sub-area is located in the north-eastern part of the Isle of Dogs. Being located in close proximity to Canary Wharf and with good linkages to the wider area, provided by two Docklands Light Railway stations, means that this area is well connected to the rest of the Borough and beyond. Residential development has become the dominant land use and it is expected that further residential development will continue.

**2007 Interim Planning Guidance - Leaside Area Action Plan**

2.78 Leaside occupies a strategic location in London; it sits within the Thames Gateway, is in close proximity to the major commercial and financial centres of the City of London and Docklands, and holds a prominent position within the Lea Valley, a unique natural environment encompassing waterways and parkland. Leaside is also one of the locations for the London 2012 Olympic and Paralympic Games, and lies partly within the London Thames Gateway Development Corporation. There is considerable potential to redevelop under-utilised industrial sites. These factors have led to Leaside becoming the focal point for change and regeneration in London, and present an extraordinary opportunity to transform the environment, identity and image of the area.

2.79 There are no large shopping centres in Leaside, and the retail and leisure offer is limited compared to other parts of the Borough. However, Chrisp Street district centre lies just to the west and Roman Road district centre to the north-west. There are also local neighbourhood centres in the area.

**Fish Island Sub-Area**

2.80 Fish Island is located to the north of the Borough and shares a border with the neighbouring London boroughs of Hackney and Newham. The area is relatively isolated from neighbouring communities with severance caused by the A12, but within the central and northern parts there is a strong urban grain with many buildings of notable historic character.

2.81 All of Fish Island, with the exception of Fish Island East, is designated as a Strategic Industrial Location in recognition of the strategic industrial importance of the area in East London.

**Bow Church Sub-Area**

2.82 Bow Church does not have much scope for re-development due to a largely established historical residential form. The Fairfield Road Conservation Area is diverse in character and is also the location of a number of important listed buildings, so proposals should have particular regard to this. All development should seek to preserve or enhance the existing character of the area and should respond appropriately to the scale and design of existing development which is primarily
residential. Bow Road is the location of a gallery and a number of small-scale work spaces and the Council would like to see these uses retained as they contribute to the diversity of the area and provide an important local employment function.

*Bromley-by-Bow North Sub-area*

2.83 Bromley-by-Bow North is planned to be an area of considerable change. This is to reflect the area’s accessibility by various forms of transport, its urban character and the potential development of riverside areas. Residential uses are at present concentrated in the west of the area, and it is planned that the industrial uses to the east of the A12 will change over time. It is important that the redevelopment of this area is managed in a comprehensive way.

2.84 The Area Action Plan states that Bromley-by-Bow should become a new neighbourhood centre with new retail and leisure uses. It should create connections over the A12 to Bromley-by-Bow underground station, and embrace the waterside and connect with Three Mills, creating vitality that will ensure a mix of uses and activities during the day and evening. A master plan will facilitate the implementation of change, as will public interventions to develop community and social facilities.

2.85 The Council wants to retain and improve the Stroudley Walk Neighbourhood Centre which also serves Bow Church to the north.

*Bromley by Bow South Sub-Area*

2.86 Bromley-by-Bow South is not an area proposed for major land-use change but the Council would like to see a greater intensification of existing uses in this location to take advantage of public transport accessibility. This area will become an active, working part of central Leaside, providing a diverse employment base and opportunities for new small and medium-sized industries. New residential communities will turn the area into a vibrant, mixed-use area which reconnects with communities to the west.

2.87 Policy L26 states that retail uses will be supported where they are of a scale and kind intended to primarily serve the needs of the development.

*Poplar Riverside Sub-Area*

2.88 Poplar Riverside is largely residential in nature with some industrial uses. Many of the housing estates in the area are the subject of a programme of estate renewal led by registered social landlords. Poplar Riverside will once again embrace the River Lea with the transfer of existing industrial uses to residential, including the creation of a series of high quality, ecologically rich open spaces responding to the River Lea surrounded by new family-focused residential communities with new community facilities, large recreation space, and a new primary school.

2.89 Policy L30 states that retail and leisure uses will be supported in the Aberfeldy Neighbourhood Centre and will only be supported in other locations where they are of a scale and kind intended primarily to serve the needs of the development.
East India North Sub-Area

2.90 East India North sub-area is extremely varied, but is not a sub-area in which major change is planned. Redevelopment is likely to be limited to a number of key sites. Policies in this sub-area are to ensure development responds appropriately to the nature and character of the sub-area, including All Saints Conservation Area.

2.91 There may be opportunities to accommodate retail development as part of residential mixed-use schemes. These should be small-scale in nature where possible so as not to have a detrimental impact upon Chrisp Street District Centre. Policy L35 states that retail and leisure uses will be supported as part of mixed-use developments in the Poplar Neighbourhood Centre.

Leamouth Sub-Area

2.92 The current industrial use on the Leamouth Peninsula site has come to the end of its economic life and the opportunity exists to redevelop this site for alternative uses. Leamouth will become a diverse area which takes full advantage of its unique waterside location. The area will contain housing, creative industries and workshops, a protected wharf, community and health facilities and green spaces, all set within a strong, legible built form, well connected to neighbouring communities.

2.93 Leamouth is not considered to be a major location for retail development. Leamouth’s proximity to Canning Town District Centre means only smaller scale retail uses are appropriate to serve the expanded residential and working community. Leisure uses would play an important role in animating the existing and new riverside walkways, and attracting visitors to the creative industries’ activity and historic assets in and around Trinity Buoy Wharf.

Regeneration Strategy Including Review

2.94 The regeneration strategy will guide the efforts of all partners working towards the borough’s economic development. It aims to: convey a clear vision of the Tower Hamlets economy in 2016; make a strong case for investment in Tower Hamlets; identify infrastructural needs within the borough; specify public-sector interventions and maximise the economic impact of the third sector. There is no specific section that relates to retailing and town centres.

2020 Vision - Tower Hamlets Community Plan

2.95 The Community Plan is a plan for the future of Tower Hamlets. It describes the kind of place that the people who live and work in the Borough want it to be and thousands of people have contributed to developing its vision. The Community Plan belongs to the community.

2.96 The following objectives are relative to town centres;

- Be among the best performing areas identified as neighbourhood renewal areas
- Provide information about service functions and availability that is recognised as clear and widely available
- Have significantly improved access to all public areas and services for people with disabilities or sensory impairment.

**Whitechapel Masterplan**

2.97 The Whitechapel Masterplan identifies a number of initiatives which will begin to tackle the crime and congestion problems in the area, whilst at the same time allowing the market to flourish. Improvements include the reorganisation of the market with new stall structures and ‘block’ layout, to make it easier to cross the road and access bus stops.

2.98 Tower Hamlets Markets team will work with the local police teams to introduce a market pod to support traders, and provide a base for local community police teams. The team will also work with market traders to identify secure storage facilities, implement new loading / unloading systems and continue investigation into provision of parking for market traders.

2.99 New shops, cafes and restaurants will be encouraged to locate throughout the centre, in addition to existing businesses. The aim will be to ensure that many are open into the evening serving people using the hospital, encouraging people to visit and stay in the area and generally making the centre of Whitechapel feel more lively, welcoming and safe. The Masterplan will encourage new developments with active ground floor uses to the south side of Whitechapel Road & New Road.

**Aldgate Masterplan**

2.100 Aldgate is a genuinely mixed use area, with a range of offices, shops, homes and community facilities. Aldgate has suffered from under-investment in recent years and the environment is blighted by the dominance of the 1970s gyratory system, which puts the needs of vehicle traffic above those of pedestrians, cyclists and public transport users. An unattractive network of subways makes pedestrian movement through the area difficult creating safety and access issues. A legacy of poorly designed, large scale office blocks detracts from the quality of the public realm.

2.101 There are opportunities for change and sustainable regeneration in Aldgate, arising from a cluster of major development sites. Some of these sites are already attracting interest from developers. There is a proposal to remove the gyratory system and close subways. There are proposals to provide new open spaces and better pedestrian and cycling facilities, re-connect the streets and create an improved public realm.

2.102 The Masterplan shows how new high density commercial and residential development in a highly accessible location, combined with the cultural and educational assets of the area can combine to create an attractive mixed use area with a real sense of place.

**Bromley by Bow Masterplan**

2.103 The Council’s Draft Bromley by Bow Masterplan (2006) sets out a vision of Bromley by Bow as “a distinctive, accessible and cohesive London neighbourhood with a strong community emphasis, a choice of local services and facilities.”
There are six objectives:

- To structure and positively plan for development that will address the severance created by the A12, railway and waterside to support and enable regeneration, economic opportunity and an increased population.
- To develop a well connected, legible and cohesive neighbourhood by providing safe, direct and attractive routes that encourage walking, cycling and use of public transport.
- To provide a new neighbourhood centre that will give a focus to the area through the provision of local shops and community facilities.
- To enhance the public realm, create new open green space with a range of facilities space and improve riverside opportunities.
- To build on the existing broad mix of uses, with a particular emphasis on increasing the diversity of housing choice, raising the quality of commercial space and providing local employment opportunities.
- To ensure that new development fosters a positive identity for Bromley-by-Bow, through the use of appropriate height and scale and by optimising the existing assets of the waterside, St. Andrew’s hospital, Three Mills and Kingsley Hall.

Key elements of the masterplan include improvements to the station to improve access from the street level, two new plazas adjacent to the station, a new primary health care facility, improved pedestrian links, open spaces and a new foodstore.

*Bishopsgate SPD*

The Council, together with LB Hackney and the Mayor of London, is starting to prepare a planning guide to direct the future development of the Bishopsgate Goods Yard site in Shoreditch. This is scheduled for adoption in early 2009.

*Blackwall Reach Development Framework*

This was produced, in draft, in 2007 and proposes around 3,000 new homes together with new businesses, community and education facilities, open space and improved transport. It also proposes a range of local shops and services to serve the new development.

*Quirky Shopping Guide*

The Quirky Shopping Guide is a guide to independent retailers across the Borough. It includes details of more than 150 independent shops and is updated regularly. It lists shops under categories such as fashion, furniture and music, as well as including sections on particular shopping areas and markets.
3 CURRENT SHOPPING AND LEISURE PATTERNS IN THE STUDY AREA

Introduction

3.1 The assessment of current shopping and leisure patterns is based on a comprehensive telephone survey of households. First, a study area was defined, considering the location of Canary Wharf and other centres inside and outside the Borough.

3.2 The study area covers the entire Borough plus some adjoining areas beyond the boundary, and is divided into eight zones. To enable detailed data collection, the zones are based on postcode areas. Each zone is an approximate catchment area for one or two of the major/district centres. A map of the study area is shown at Figure 3.1 below.

Figure 3.1 Study Area
3.3 The telephone survey resulted in 800 completed and valid responses. The latest population data from MapInfo shows that in 2005 there were around 153,200 households in the study area. The 800 responses thus represent around just over 0.5% of households in the study area. A sample size of 0.4% is usually considered statistically valid for a telephone survey and so this is a robust sample size. There were around 100 responding households from each of the eight zones, with all results weighted to reflect the distribution of population within the study area. The sample also represents a range of households (age, composition, income), because households were drawn on a random basis from electoral records.

3.4 The telephone survey was undertaken in June 2008 by NEMS Market Research. A copy of the survey and the tabulated results are included at Appendix 1.

3.5 The main purpose of the household survey was to establish:

- The shop or shopping centre in which households spend most money on main trips for food and groceries, and the shop or shopping centre in which households spend most money on top-up purchases of food and groceries.
- The town centre or retail park in which households spend most and second most on each of the following goods:
  - clothes and shoes;
  - furniture, carpets and soft household furnishings;
  - DIY and decorating goods;
  - domestic appliances, such as washing machines, fridges, cookers, TVs, DVD players and computers;
  - specialist non-food items, such as china, glass, books, jewellery, photographic goods, musical instruments and sports equipment.
- The main locations visited for various types of commercial leisure activities, namely restaurants, cafes and bars, cinemas, theatres and museums, recreation and sport, hair and personal grooming, and games of chance.

3.6 For food and groceries, the results of the two types of shopping trip questions (main and top-up) were then merged, using a weighting. The weighting applied reflects the national market share of the large supermarket operators vis-à-vis the smaller operators and independents:

- Main food and groceries = 70%
- Top-up food and groceries = 30%
- All convenience expenditure = 100%

3.7 The result is a “composite” pattern of convenience spending, expressed as market shares for each destination centre or foodstore, for each survey zone.

3.8 For the comparison sector, composite market shares were derived through the application of two sets of weights. The first weighting reflects the estimated proportions of comparison expenditure accounted for by the top spending locations in relation to secondary locations:

- Top spend location = 70% of expenditure (depending on type of goods)
- Secondary spend locations = 30% of expenditure (depending on type of goods)
- All comparison expenditure = 100%
3.9 The second weighting reflects the proportion of expenditure spent by the residents of the study area on different types of comparison goods. This is based on local expenditure estimates obtained from MapInfo. The weights are shown in the table below:

<table>
<thead>
<tr>
<th>Comparison sub-sector</th>
<th>Weighting (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes and shoes</td>
<td>29</td>
</tr>
<tr>
<td>Furniture, carpets, soft household furnishings</td>
<td>12</td>
</tr>
<tr>
<td>DIY and decorating goods</td>
<td>8</td>
</tr>
<tr>
<td>Domestic appliances such as fridges, cookers and other electrical goods</td>
<td>15</td>
</tr>
<tr>
<td>Specialist non-food items such as china, glass, books, jewellery, photographic goods, musical instruments and sports equipment</td>
<td>36</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Source: MapInfo

3.10 The market shares for each of the eight survey zones can then be applied to the pot of expenditure available to the residents of each zone. This is calculated using data on population and per capita spending from MapInfo. This expresses the patterns of shopping in absolute money terms and so allows the turnover of each centre or store to be calculated. This process and the relevant outputs are explained as part of the consideration of quantitative need at Section 13 of this study.

**Comparison shopping patterns**

**Tower Hamlets Centres**

3.11 The locations of the Borough’s centres are shown in Figure 3.2 below
Figure 3.2 Centres in Tower Hamlets
Most popular centres for comparison shopping

3.12 In our consideration of the comparison shopping patterns, we focus our assessment on the composite (or total) market shares. These are calculated through the application of weights as explained above.

3.13 The West End has the highest composite market share of study area comparison expenditure (20%). This is lower than in other areas studied by RTP where the West End has drawn 40-50% of comparison expenditure. Canary Wharf has a composite market share of 7% whilst market shares of the Borough’s district centres are very low. This situation is similar to that found in other areas studied by RTP.

3.14 There is also a high market share for internet, mail order and catalogue shopping (15% overall, above the estimated national average of 7.5%). This is despite the survey finding that only 27% of respondents have access to the internet at home compared to the national average of 65%. This may be due to the lack of bulky goods retailers in the Borough.

3.15 In Table 3.2 below, we identify the most popular comparison goods shopping destinations for each of the study’s eight zones and show their market shares from that zone.

Table 3.2 Most popular centres in study area

<table>
<thead>
<tr>
<th>Zone</th>
<th>Most popular centres (market share)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Isle of Dogs</td>
<td>Canary Wharf (24%), West End (16%)</td>
</tr>
<tr>
<td>2 Chrisp Street</td>
<td>Canary Wharf (10%), West End (10%)</td>
</tr>
<tr>
<td>3 Whitechapel</td>
<td>West End (25%), Canary Wharf (8%)</td>
</tr>
<tr>
<td>4 Bermondsey</td>
<td>West End (19%), Surrey Quays (17%)</td>
</tr>
<tr>
<td>5 Greenwich</td>
<td>West End (21%), Lewisham (14%)</td>
</tr>
<tr>
<td>6 Bethnal Green</td>
<td>West End (33%), Bethnal Green (10%)</td>
</tr>
<tr>
<td>7 Roman Road</td>
<td>West End (18%), Stratford (10%)</td>
</tr>
<tr>
<td>8 Stratford</td>
<td>Stratford (25%), West End (11%)</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

3.16 The above table demonstrates that the West End draws strongly from all survey zones. For residents of Zones 1 (Isle of Dogs), 2 (Chrisp Street) and 3 (Whitechapel), Canary Wharf also has a strong draw. For residents of zones in the eastern part of the study area, Stratford is also popular whilst for residents of zones in the southern part of the study area, Lewisham and Surrey Quays are popular.

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1 Hackney Retail and Leisure Study (2005) : West End has 40% market share of study area expenditure, Camden Retail Study (Draft, 2008): West End has a market share of 43%
2 Hackney Retail and Leisure Study (2005) : Dalston market share 11%, Camden Retail Study (Draft, 2008): Camden Town market share 5%
3 Experian Retail Planner Briefing Note 2.3D (2005) Table 6.2
4 www.statistics.gov.uk
The only Tower Hamlets district centre to draw a market share of 10% or above from any zone is Bethnal Green.

**Main locations for different types of comparison goods purchases**

3.17 We now comment briefly on the different comparison shopping sub-sectors. The NEMS data attached at Appendix 1 contain full details of the results for each type of comparison goods purchase.

- For **clothes and shoes** shopping, the West End is the most popular location and has a market share of 28%. The West End draws particularly high clothes and shoe shopping expenditure from our survey Zone 6 (45%). Canary Wharf has a market share of 7% with high draws from Zones 1 (Isle of Dogs), 2 (Chrisp Street) and 3 (Whitechapel).
- The most popular destination for **furniture, carpets and soft household furnishings** is again the West End, with a market share of 17%. Internet, mail order and catalogue sales also draw 17% of spend in this category.
- For **DIY goods and decorating goods** shopping, the most popular location is Beckton with a market share of 17%. Beckton has a particularly high draw from Zones 1 (Isle of Dogs), 2 (Chrisp Street) and 8 (Stratford). Greenwich is the second most popular location, with a market share of 10% and a particularly high draw from the Greenwich zone.
- The highest proportion of expenditure on **domestic appliances** is spent via the internet, mail order and catalogues (20%). The most popular centre is the West End, with a market share of 15%. The West End has a particularly high draw from Zone 4 (Bermondsey) and Zone 6 (Bethnal Green).
- The most popular centre for **specialist comparison goods** is the West End, with a market share of 21%. The West End draws particularly highly from Zones 3 (Whitechapel) and 6 (Bethnal Green). Internet, mail order and catalogue sales draw the second highest proportion of spend on specialist comparison goods, with a 20% market share.

3.18 **Table 3.3** below provides a summary of the dominant centres for the five different types of comparison goods as used as the basis for the household survey.
Table 3.3  Most popular centres for different types of comparison goods

<table>
<thead>
<tr>
<th>Market Share</th>
<th>Clothes &amp; Shoes</th>
<th>Furniture, Carpets etc</th>
<th>DIY &amp; Decorating</th>
<th>Domestic Appliances</th>
<th>Specialist Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highest</td>
<td>West End</td>
<td>West End</td>
<td>Beckton</td>
<td>Internet etc</td>
<td>West End</td>
</tr>
<tr>
<td>2nd Highest</td>
<td>Canary Wharf</td>
<td>Internet etc</td>
<td>Greenwich</td>
<td>West End</td>
<td>Internet etc</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

3.19 None of the Tower Hamlets centres are currently the dominant centre for any type of comparison goods in the study area. Canary Wharf is the second most popular centre for clothes and shoe shopping.

Retention of expenditure

3.20 Overall, the study area retains 21% of its comparison goods expenditure, which is about average compared to other areas studied by RTP. As discussed, residents of Inner London Boroughs tend to have easy access to the wide range of comparison shops in the West End and so many choose to shop there. This is in accordance with the London Plan, which designates Oxford Street as an “International Centre”.

3.21 Exceptions are bulky items such as DIY & Decorating goods, for which residents of the study area travel to Beckton and Greenwich - probably to the Gateway Retail Park and the Greenwich Shopping Park, both of which have B&Q stores. Many people buy domestic appliances via the internet, mail order or catalogues - probably because of the lack of shops selling domestic appliances in the Borough.

Convenience shopping patterns

Foodstores in Tower Hamlets

3.22 Figure 3.3 below shows the locations of the main foodstores in the study area.

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5 Hackney Retail and Leisure Study (2005): Borough market share of 16%, Camden Retail Study (Draft, 2008): Borough market share of 20%, Brent Retail Need & Capacity Study (2006): Borough market share of 41%
Figure 3.3 Foodstores in Tower Hamlets

Main Foodstores in Study Zones
1. Asda, 151 East Ferry Road, Isle Of Dogs
2. Budgens, 371-373 Whitechapel Road, Whitechapel
3. Budgens, 383-387 Mile End Road, Bow
4. Co-op (South East), 200-206 Trafalgar Road, Greenwich
5. Epsom Freezer Foods, 19 Rathbone Market, Barking Road
6. Iceland, 146/148 Barking Road, Canning Town
7. Iceland, 110/114 High Street, Deptford
8. Iceland, Watney Street Market, Stepney
9. Iceland Extra, 210-218 Trafalgar Road, Greenwich
10. J Sainsbury, 1 Cambridge Heath Road, Whitechapel
11. J Sainsbury, Horn Lane, 55 Bagleys Way, Greenwich
12. Lidl, Berwood Street, Bermondsey
13. Lidl, 366 Burdett Road, Limehouse, Poplar
14. Sainsbury’s Local, 43-45 Fenchurch Street, London
15. Sainsbury’s Local, 101 Evelyn Street, Deptford
16. Simply Food, Cutty Sark Station, 55-57 Greenwich Church Street
18. Simply Food, Jubilee Place, Canary Wharf
19. Somerfield, 127-131 Bow Road, Bow
20. Somerfield, 77-101 The Highway, Shadwell
21. Somerfield, 245-247 Greenwich High Road, Greenwich
22. Somerfield, 57-73 Chisip Street, Poplar
23. Somerfield, 24 Barking Road, Canning Town
24. Tesco, Three Mill Lane, off Hancocks Road, Bow
25. Tesco, Surrey Quays, Redriff Road, Rotherhithe
26. Tesco Express, 116-118 Commercial Street, Spitalfields
27. Tesco Express, 204-206 Kingsland Road, Hackney
28. Tesco Metro, 15 Cabot Square, Isle Of Dogs
29. Tesco Metro, 156-164 Bishopsgate, Bishopsgate
30. Tesco Metro, 561 Bethnal Green Road, Bethnal Green
31. Waitrose, 41 Thomas More Street, St Katherine’s Docks, Wapping
32. Waitrose, Canada Place, Canada Square
33. Welcome (South East), 193-197 Mile End Road, Stepney

**Most popular stores for convenience shopping**

3.23 The store with the highest market share across the study area is the Sainsbury store at Whitechapel (13%), followed by the Asda at Crossharbour (9%) and the
Tesco stores at Bow and Surrey Quays (both 8%). The most popular convenience stores in each survey zone are identified in Table 3.4 below. This shows each store’s market share from the zone in which it is located.

3.24 Supermarket provision varies across the eight zones. Zones 1, 2, 4, 5 and 6 all contain one of the top four operators (Tesco, Asda, Sainsbury and Morrisons). Zone 3 (Whitechapel) contains several supermarkets although none of the top four operators. Provision in Zone 7 (Roman Road) is very poor; there is only a Somerfield store and a Welcome store and both are located in the southern part of the zone. In Zone 8 (Stratford) there are no supermarkets, although there are stores to the east, outside of the study area.

### Table 3.4 Most popular convenience stores in study area

<table>
<thead>
<tr>
<th>Zone</th>
<th>Most popular</th>
<th>% Market Share Within the Zone</th>
<th>Second most popular</th>
<th>% Market Share Within the Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Isle of Dogs</td>
<td>Asda, Crossharbour</td>
<td>52</td>
<td>Waitrose, Canary Wharf</td>
<td>21</td>
</tr>
<tr>
<td>2 Chrisp Street</td>
<td>Tesco, Bow</td>
<td>26</td>
<td>Asda, Crossharbour</td>
<td>12</td>
</tr>
<tr>
<td>3 Whitechapel</td>
<td>Sainsbury, Whitechapel</td>
<td>28</td>
<td>Waitrose, Katherine’s Dock</td>
<td>15</td>
</tr>
<tr>
<td>4 Bermondsey</td>
<td>Tesco, Surrey Quays</td>
<td>61</td>
<td>Waitrose, Canary Wharf</td>
<td>2</td>
</tr>
<tr>
<td>5 Greenwich</td>
<td>Tesco, Lewisham</td>
<td>23</td>
<td>Sainsbury, Greenwich</td>
<td>17</td>
</tr>
<tr>
<td>6 Bethnal Green</td>
<td>Sainsbury, Whitechapel</td>
<td>22</td>
<td>Tesco Metro, Bethnal Green</td>
<td>21</td>
</tr>
<tr>
<td>7 Roman Road</td>
<td>Sainsbury, Whitechapel</td>
<td>18</td>
<td>Tesco, Bow</td>
<td>14</td>
</tr>
<tr>
<td>8 Stratford</td>
<td>Tesco, Bow</td>
<td>17</td>
<td>Sainsbury, Stratford</td>
<td>15</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

3.25 As would be expected, the most popular store for the residents of each zone tends to be the nearest of the ‘top four’ operators.

3.26 In several of the zones (3, 4, 5 and 7) the “other” category has a high market share. This means that a high proportion of respondents undertake their convenience shopping in small local shops and street markets. This suggests that independent retailers and street markets have an important role in the Borough.

3.27 Shopping via the internet has a 3% market share, slightly below the estimated national average of around 4%.

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6 Experian Retail Planner Briefing Note 2.3D (2005) Table 6.2
Retention of expenditure

3.28 The study area performs well in terms of convenience shopping, with 72% of residents carrying out their convenience shopping at shops and stores within the study area. Stores in Tower Hamlets attract around 60% of study area convenience expenditure, which is a similar situation to that in other areas studied by RTP.7

3.29 Table 3.5 below sets out the localised convenience goods retention levels for each of the eight zones.

Table 3.5 Localised retention levels of convenience goods

<table>
<thead>
<tr>
<th>Zone</th>
<th>Retention level (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Isle of Dogs</td>
<td>84</td>
</tr>
<tr>
<td>2 Chrisp Street</td>
<td>44</td>
</tr>
<tr>
<td>3 Whitechapel</td>
<td>47</td>
</tr>
<tr>
<td>4 Bermondsey</td>
<td>71</td>
</tr>
<tr>
<td>5 Greenwich</td>
<td>39</td>
</tr>
<tr>
<td>6 Bethnal Green</td>
<td>34</td>
</tr>
<tr>
<td>7 Roman Road</td>
<td>23</td>
</tr>
<tr>
<td>8 Stratford</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

3.30 The retention level is the percentage of the expenditure in each zone which is spent in the stores within that same zone. For example, 84% of the convenience expenditure in Zone 1 is spent in the stores in Zone 1. This information is important because convenience goods shopping is much more localised than comparison shopping. Low localised retention levels are a potential cause for concern. Dependent on zone size and store distribution, low retention levels probably reflect a position whereby residents are travelling long distances to undertake their convenience shopping.

3.31 Zone 1 (Isle of Dogs) has the highest retention rate, probably because of the large Asda store and the relative difficulty of travelling outside the zone. Zone 4 (Bermondsey) also has a high retention rate, likely due to the large Tesco store at Surrey Quays.

3.32 The zone with the lowest retention rate is Zone 8 (Stratford). As discussed, there are no supermarkets in this zone so residents have to travel outside it (with the most popular store being Tesco, Bow). Zones 6 (Bethnal Green) and 7 (Roman Road) also have low retention rates. Zone 6 has a Sainsbury store but this is on the

7 Hackney Retail and Leisure Study (2005): Borough market share of 55%, Camden Retail Study (Draft, 2008): Borough market share approx. 50%, Brent Retail Need & Capacity Study (2006): Borough market share of 76%
edge of the zone at Cambridge Heath Road. Zone 7 has only Somerfield and Welcome stores, both located on the southern edge of the zone.

**Leisure patterns**

3.33 The household survey included a question that asked respondents where they spent the most money on certain types of leisure activity - restaurants, cafes and bars; cinemas, theatres and museums; recreation and sport; hair and personal grooming; and games of chance. The detailed findings of the survey can be found in Appendix 1.

3.34 **Table 3.6** below identifies the most popular destinations for each of these leisure activities.

**Table 3.6 Top two centres where most money is spent on each leisure activity**

<table>
<thead>
<tr>
<th>Leisure activity</th>
<th>Most popular</th>
<th>Second most popular</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants, cafes, bars</td>
<td>West End</td>
<td>Canary Wharf</td>
</tr>
<tr>
<td>Cinemas, theatres, museums</td>
<td>West End</td>
<td>Canary Wharf</td>
</tr>
<tr>
<td>Recreation &amp; sport</td>
<td>Bethnal Green</td>
<td>Canary Wharf</td>
</tr>
<tr>
<td>Hair &amp; personal grooming</td>
<td>West End</td>
<td>Bethnal Green</td>
</tr>
<tr>
<td>Games of chance</td>
<td>East Ham</td>
<td>Canary Wharf/W End/ Stratford</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

3.35 The key points emerging from the telephone survey regarding leisure expenditure are as follows:

- The West End is the most popular location for visiting restaurants, cafes and bars, reflecting the ease of access from much of Tower Hamlets and the likelihood that many of these respondents work in the West End. This is followed by Canary Wharf, also an after work destination with a wide range of provision. Around one third of households stated that they do not visit restaurants, cafes and bars.

- The West End is the most popular location for cinemas, theatres and museums. This is to be expected given the wide range of provision in the West End and the ease of access from much of Tower Hamlets. The second most popular location is Canary Wharf where there is a cinema (at West India Quay), the Museum at Docklands and regular outdoor screenings and performances in the summer. However, around 40% of respondents said that they do not visit cinemas, theatres and museums.

- Respondents visit a range of locations for recreation and sport, with the most popular being Bethnal Green (where the recently refurbished York Hall Leisure Centre is located) and Canary Wharf (where there are a range of private health clubs). However, around 60% of households said that they do not participate in recreation and sport.
Hair and personal grooming is a very localised activity. Bethnal Green and Canary Wharf are the most popular locations but they only have small market shares. Almost half of respondents said that they do not visit hairdressing salons.

Most respondents (93%) said that they do not participate in games of chance. The most popular destination for games of chance is East Ham, but this was named by only 2% of respondents.

The responses “don’t know/varies” and “other” were unusually popular. This suggests that a section of Tower Hamlets residents are highly mobile and make use of the Borough’s good transport links to travel to a range of leisure facilities. Conversely, the rates of non participation in leisure activities are unusually high - perhaps suggesting that many of the Borough’s lower income households are unable to afford leisure activities.

Below, we consider the localised pattern of leisure activities. Table 3.7 shows the main centre where each activity is undertaken for each zone. Games of chance are excluded from the table because so few respondents reported that they participate in them. The responses “don’t know/varies” and “other” are also excluded.

<table>
<thead>
<tr>
<th>Survey zone</th>
<th>Restaurants, cafes and bars</th>
<th>Cinemas, theatres and museums</th>
<th>Recreation &amp; sport</th>
<th>Hair &amp; personal grooming</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Isle of Dogs</td>
<td>Canary Wharf</td>
<td>Canary Wharf</td>
<td>Canary Wharf</td>
<td>Canary Wharf</td>
</tr>
<tr>
<td>2 Chrisp Street</td>
<td>West End</td>
<td>Canary Wharf</td>
<td>Mile End</td>
<td>West End</td>
</tr>
<tr>
<td>3 Whitechapel</td>
<td>West End</td>
<td>West End</td>
<td>Wapping Lane</td>
<td>West End</td>
</tr>
<tr>
<td>4 Bermondsey</td>
<td>West End</td>
<td>West End</td>
<td>Surrey Quays</td>
<td>Surrey Quays</td>
</tr>
<tr>
<td>5 Greenwich</td>
<td>Greenwich</td>
<td>Greenwich</td>
<td>Greenwich</td>
<td>Greenwich</td>
</tr>
<tr>
<td>6 Bethnal Green</td>
<td>West End</td>
<td>West End</td>
<td>Bethnal Green</td>
<td>Bethnal Green</td>
</tr>
<tr>
<td>7 Roman Road</td>
<td>West End</td>
<td>West End</td>
<td>Bethnal Green</td>
<td>Hackney</td>
</tr>
<tr>
<td>8 Stratford</td>
<td>Stratford</td>
<td>Stratford</td>
<td>Bethnal Green</td>
<td>Stratford</td>
</tr>
</tbody>
</table>

Source: NEMS household survey, June 2008

Residents of the zones in the west of the study area tend to use leisure facilities in the West End, which are easily accessible from these zones. Bethnal Green is popular with its local residents for some leisure activities, as is Surrey Quays with residents of Zone 4 (Bermondsey).

People living in Zone 2 (Chrisp Street), in the east of the study area, visit the West End and Canary Wharf.

Canary Wharf and Greenwich are the most popular destinations for all types of leisure activity in their respective zones, and Stratford is also popular with its local residents for most activities.
3.41 The survey results suggest that there is potential for more local provision of leisure facilities, particularly in Zones 2 (Chrisp Street), 3 (Whitechapel), 6 (Bethnal Green) and 7 (Roman Road).
4 SURVEY RESULTS CANARY WHARF

Introduction

4.1 In this and the following seven sections, the healthchecks are set out for each major and district centre, together with the results of the visitor surveys and (where applicable) trader consultation.

4.2 The centre healthchecks were undertaken in May 2008. They include data on market and qualitative indicators, as advised by policy guidance in PPS6, as well as development opportunities. They provide an update to the GLA’s London-wide Town Centre Healthchecks 2006 but include data on a wider range of indicators.

4.3 The in-centre visitor surveys were carried out by NEMS in June 2008. A minimum of one hundred visitors were surveyed in Canary Wharf and each of the seven district centres, as well as Brick Lane and Poplar neighbourhood centres. The survey provides information on how respondents had travelled to each centre, the purpose of their visits and what they liked and disliked about each centre. A copy of the in-centre visitor questionnaire and the full tabulated results are included at Appendix 2.

Healthcheck

Overview

4.4 Canary Wharf is located in the Isle of Dogs towards the south-east of the Borough. It is designated as a major centre in the London Plan and the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. In our opinion this is the correct designation because the centre has over 50,000sqm of retail floorspace in total, including both comparison and convenience retail. It also includes services and leisure facilities and is highly accessible.

4.5 The centre is the largest in Tower Hamlets and contains 14,690sqm comparison retail floor space. The town centre serves a substantial weekday worker population, and this is complemented by its attraction as a weekend shopping destination.

4.6 The centre consists of shopping malls over 4 levels, with food establishments. Canary Wharf is an important employment location with a large number of office buildings.

4.7 The key role of Canary Wharf is:

- Convenience shopping: The centre contains a medium sized foodstore, operated by Waitrose containing in excess of 3,720 sqm gross floorspace,

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8 Goad, Canary Wharf, 2005
9 Goad, Canary Wharf, 2005.
Marks and Spencers food hall which is smaller in size containing around 2,800 sqm net sales floorspace, and a Tesco Metro containing around 1,145 sqm net sales floorspace. There are also a few independent specialist convenience stores.

- Comparison shopping: Canary Wharf is home to approximately 80 high street brands including Dorothy Perkins, Boots, Gap, Monsoon, French Connection, HMV, River Island and JD Sports.
- Other facilities: Canary Wharf is a major business area and there is office use in the centre. There are 6 high street banks located within the centre and 2 travel agents. The centre also contains evening uses including 9 restaurants and over 25 cafes and bars.

**Rents**

4.8 According to Colliers CRE 2007 town centre rents data, Zone A rents\(^{10}\) for Canary Wharf are around £3,229 per sqm per annum. They have increased by over £2,000 since 2000 when typical Zone A rents were £1,184 per sqm. Canary Wharf has the highest retail rents in Tower Hamlets.

4.9 Figure 4.1 below shows that Canary Wharf rents are not as high as rents in Oxford Street. This is to be expected; Oxford Street is a high order centre designated as an ‘International Centre’ in the London Plan and has the largest concentration of retail in the UK as well as being a major tourist destination. The rents in Canary Wharf are however higher than other ‘Major Centres’ in east and south London and this is likely to be due to the high income working population, specialist and niche brands, and the pleasant and modern shopping environment.

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\(^{10}\) Zone A rent relates to a hypothetical shop unit of optimum size and configuration, in the most popular location (prime pitch)
**Retailer requirements**

4.10 According to the 'FOCUS' property database, which publishes retailer requirements, there are 22 retailers seeking space in Canary Wharf. These requirements range from 100 sqm for a pasty shop to 30,000 sqm for a 'Days Inn' hotel. This indicates that national multiple retailers and service providers consider Canary Wharf to be a desirable centre which is likely to attract sufficient numbers of customers to meet their requirements.

**Diversity of uses and retailer representation**

4.11 Table 4.1 below presents the aggregate total of units in Canary Wharf which are in A Class use, are vacant or in other use. Canary Wharf's total net floorspace is approximately 61,000sqm, giving an average unit size of approximately 788 net sqm, although the units in the centre vary greatly.
### Table 4.1 Diversity of use - Canary Wharf

<table>
<thead>
<tr>
<th>Canary Wharf</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Retail - Comparison</td>
<td>98</td>
<td>44</td>
</tr>
<tr>
<td>A1 Retail - Convenience</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>19</td>
<td>9</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>58</td>
<td>26</td>
</tr>
<tr>
<td>A4 Drinking Establishments</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>A5 Hot Food Take-away</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>44</td>
<td>20</td>
</tr>
<tr>
<td>Vacant</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>225</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets (percentages are rounded)

4.12 44% of the total units in Canary Wharf are occupied by A1 comparison retailers. The Goad 2008 GB data shows that, on average, 45% of units across all town centres are used for comparison goods. Canary Wharf therefore provides an average percentage of comparison goods units.

4.13 In contrast, 3% of the units in Canary Wharf are used for the sale of convenience goods, much lower than the Goad GB average of 9%. Most of the convenience floorspace can be attributed to the Waitrose, M&S and Tesco supermarkets.

4.14 Food and drink uses (Classes A3: Restaurants & cafes, A4: Drinking establishments and A5: Hot food takeaways) equate to 26% of the total units in Canary Wharf. This amount of food and drink use creates a healthy evening economy in Canary Wharf.

**Vacancy rates**

4.15 Canary Wharf has no vacant units which indicates that it is a healthy centre.

**Accessibility to centre**

4.16 Canary Wharf is well served by buses, which run to the centre of London and outer London. There are up to 30 buses an hour in peak periods.

4.17 Canary Wharf Underground Station (Jubilee Line) is within the primary shopping area, Canary Wharf is also on the Docklands Light Railway. Canary Wharf is therefore very easily accessible for visitors from outside the immediate area.

4.18 Aspen Way (A1261 road) is the nearest major road and runs from the centre of London to the east. Canary Wharf is easily accessible from Aspen Way and there are four underground public car parks, three of which lead directly into Cabot,

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11 Retail Composition, Goad Centre Report, 2008.
12 At time of healthcheck visit June 2008.
Canada and Jubilee Place shopping malls. There are currently 2,911 spaces available with designated bays for disabled drivers and parents with children. Pedestrian links with the surrounding area are poor, especially to the north and Poplar, where Aspen Way is a big barrier.

**Accessibility within the centre**

4.19 The main shopping and leisure area of Canary Wharf is largely pedestrianised. There are a few roads running through the centre providing access to the car parks and offices however, these roads are not busy.

**Safety and crime**

4.20 CCTV cameras in Canary Wharf provide some reassurance for visitors to the centre. At the time of the health check, the area felt safe and there was no visible evidence of crime or vandalism. The area is well lit and is therefore unlikely to be intimidating at night-time.

**Environmental quality**

4.21 Overall, Canary Wharf is an attractive, modern centre with a pleasant feel. The area is well kept and there is no evidence of vandalism, littering or neglect.

4.22 There is a good amount of functional street furniture and public seating in the centre. The furniture is well designed and is in keeping with the general streetscape.

4.23 The buildings in the centre are of modern architectural style. Canary Wharf has some of the highest buildings in London and makes a significant contribution to London’s skyline. Most of the buildings are attractive and are well kept.

4.24 The minimal level of traffic at Canary Wharf contributes to the centre’s environmental quality.

**Development opportunities**

4.25 There are designations made in the Isle of Dogs Area Action Plan (2007) for further retail, leisure, employment, public open space and residential uses within the centre. The plan also identifies an opportunity for further tall buildings to accommodate future expansion of employment uses in the area and also to reinforce the role of the area as a key financial and business service centre.

4.26 The Wood Wharf Partnership has submitted a proposal for 500,000 sqm of offices and 1,600 homes next to Canary Wharf. The plans include six office blocks built around a new square and a park, as well as some shops and community facilities. The proposal is currently being considered.

4.27 The Millennium Quarter is an approximately 20ha site located to the south of Canary Wharf. There is an overall masterplan and ten sites are currently proceeding through planning stages. The Millennium Quarter will offer a mix of offices, housing, leisure, cultural activities, shopping and community facilities.
Summary of in-centre survey results

Trip Characteristics

4.28 Over half of respondents (53%) travelled to the centre by underground/DLR, a further 20% on foot and 12% by bus.

4.29 The majority of respondents (24%) visited Canary Wharf on 2 to 3 days a week, this was followed by 4 to 6 days a week (20%).

4.30 34% of visitors intended to spend £21-£50 in the centre whilst a quarter of respondents said they intended to spend £5-£20. A further 13% intended spending £51-£100.

Purpose for visiting the centre

4.31 The majority of visitors (32%) stated that their reason for visiting the centre was to buy food items. Following this, the second most popular reason for visiting the centre was to buy non-food goods (26%) and then thirdly to go to work (14%).

Leisure

4.32 When asked if the centre was lacking in any kind of leisure facility 58% didn’t think that it was, 16% did and 26% didn’t know.

4.33 Of those who felt that Canary Wharf was lacking in a certain type of leisure facility 42% stated ‘other’, 25% felt that the centre should have a theatre and 17% thought that there should be leisure centre, youth club or tennis courts (although there are already several private leisure clubs in Canary Wharf).

4.34 Only 1% of respondents thought that the centre had too many of a certain type of leisure facility (pubs / bars), 74% didn’t think it did and 25% didn’t know.

Likes and dislikes

4.35 Nearly half of respondents (46%) liked that the centre was near / convenient. After this 43% of visitors liked the cleanliness of the centre.

4.36 The highest proportion of visitors (63%) disliked nothing in particular about the centre.
5 BETHNAL GREEN

Healthcheck

Overview

5.1 Bethnal Green is located in the central part of the Borough, immediately east of the City Fringe. It is designated as a district centre within the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. In our view this is appropriate because it provides a supermarket, together with a range of other retail and service outlets, for its local community, and is within walking distance of a public transport node (Bethnal Green underground station).

5.2 The key role of Bethnal Green is:

- Convenience shopping: The centre contains a small sized foodstore operated by Tesco containing a sales floor area of around 1,300sqm which is used for top-up shopping. There are also a number of independent specialist convenience stores.
- Comparison shopping: There are a number of independent stores and market stalls within Bethnal Green selling goods such as clothes and home furnishings which are largely marketed at the local Bangladeshi population.
- Other facilities: There are a number of high street chain food outlets including KFC and independent fast food outlets. There are also a number of high street banks, betting shops and car repair garages.

5.3 Bethnal Green market is open from Monday to Saturday from 8am to 6pm. It has 104 pitches mainly selling ladieswear, household software and electrical goods.

Rents

5.4 Asking prices of retail units currently on the market in Bethnal Green suggest Zone A rental values of between £250 and £350 per sqm. There is however little evidence available at the time of drafting\(^{13}\).

5.5 **Figure 5.1** below shows the average retail rents for the district centres in Tower Hamlets. There is no data available for Roman Road West.

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\(^{13}\) Market Report, September 2008, BPS Surveyors
Figure 5.1: District Centres - Asking Price for Rental Units

Source: Market Report, September 2008, BPS Surveyors

5.6 The graph shows that Whitechapel has significantly higher retail rents than the other district centres at £575 per sqm, followed by Watney Market at £400 per sqm. Crossharbour has the lowest retail rents at £200 per sqm. Bethnal Green, Roman Road East and Chrisp Street all have mid-range rents of around £300.

5.7 Rent for market stall pitches in Bethnal Green is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday.

Retailer requirements

5.8 According to the ‘FOCUS’ property database, which publishes retailer requirements, there are 6 retailers seeking space in Bethnal Green. These requirements range from 100 sqm for a coffee shop to 2,200 sqm for a ‘Marstons Plc’ pub. This indicates that national multiple retailers and service providers consider Bethnal Green to be a desirable centre which is likely to attract sufficient numbers of customers to meet their requirements.

Diversity of uses and retailer representation

5.9 Table 5.1 below presents the aggregate total of units in Bethnal Green centre which are in A Class use, are vacant or in another use.

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5.10 51% of the total units in Bethnal Green are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average, 45% of units across all town centres are used for comparison goods. Bethnal Green therefore provides an above average percentage of comparison goods units. In contrast 6% of the units in Bethnal Green are used for the sale of convenience goods, which is lower than the Goad GB average of 9%.

5.11 Food and drink uses (Classes A3: Restaurants & cafés, A4: Drinking establishments and A5: Hot food takeaways) equate to 17% of the total units in Bethnal Green.

**Vacancy rates**

5.12 Bethnal Green has no vacant units or stall pitches\(^{15}\) which indicates that it is a healthy centre.

**Accessibility to centre**

5.13 Bethnal Green is well served by buses, which run to the centre of London and outer London. The buses are at regular intervals as Bethnal Green Road is a busy thoroughfare into Central London.

5.14 Bethnal Green Underground Station is located just outside the primary shopping area and is on the Central Line which provides access to central and outer London as well as main line railway stations. Bethnal Green overground station is located 5 minutes walk away from the centre and is easily accessible.

5.15 Bethnal Green Road is also accessible by private transport because it is on the main road which runs from the centre of London to the east. However, there are no public car parks in close proximity to the centre. There are no cycle lanes along Bethnal Green Road.

\(^{15}\) At time of healthcheck visit June 2008.
Accessibility within the centre

5.16 The main shopping area of Bethnal Green is very congested. The pavements are wide but are very busy at peak shopping times and provide a location for the many market stalls. There are a number of pedestrian crossings across the main road.

Safety and crime

5.17 CCTV cameras in the Bethnal Green centre provide some reassurance for visitors to the centre. At the time of the health check, the area felt quite safe, however there was some graffiti evident. The area is well lit and therefore the main street is unlikely to be considered intimidating at night-time. The side streets are not as well lit and are likely to feel unsafe.

Environmental quality

5.18 Bethnal Green is quite littered, has dirty pavements and there is evidence of graffiti. The area feels quite neglected and many of the buildings are in need of some upgrading. There is little street furniture or public seating in the centre. However, we understand that streetscene enhancements are currently taking place.

5.19 The buildings along Bethnal Green Road are relatively old and have an interesting and varied architectural style, however many of the buildings have fallen into a poor state of repair and have been replaced with modern shop fronts.

5.20 The high level of traffic at Bethnal Green has a negative impact upon the centre’s environmental quality as it results in the centre being very noisy and congested. The market takes up considerable space on the pavement, causing crowding for pedestrians.

Development opportunities

5.21 There is currently an available site close to Bethnal Green station. The Council are considering developing an Idea store on this site.

Summary of in-centre survey results

Trip Characteristics

5.22 The majority of respondents (64%) travelled to the centre on foot. A further 12% reached the centre by rail and 8% as a car / van driver.

5.23 Over a third of respondents (38%) visited the centre on 4 to 6 days a week. A further 20% visited the centre on 2 to 3 days a week.

5.24 Nearly half of visitors (48%) intended on spending nothing in the centre. 28% were intending to spend £5-£20 and 18% less than £5.

Purpose for visiting the centre

5.25 The most popular reason for visiting Bethnal Green was to meet someone (20%), followed by as a day visitor (12%). After this, four answers were each stated by 10% of visitors: to buy food items, to work, because they lived there and no particular reason / no other reasons.
Markets

5.26 74% of respondents said they did visit the market whilst 26% said they didn’t.

5.27 Of those respondents who did visit the market, 24% said they liked nothing in particular and 21% liked the sense of community and the good quality of stalls in general.

5.28 The majority of respondents who visited the market disliked nothing in particular (46%), following this 14% said that they disliked the lack of choice of stalls.

Leisure

5.29 When asked if the centre was lacking in a certain type of leisure activity, 72% thought that it wasn’t, 20% thought that it was and 8% didn’t know.

5.30 Of those who felt that Bethnal Green was lacking in a certain type of leisure activity, half stated swimming pool, 30% said ‘other’ and 20% said restaurant.

5.31 90% of respondents didn’t feel that the centre had too many of a certain type of leisure facility, 6% thought it did (with various facilities mentioned) and 4% didn’t know.

Likes and dislikes

5.32 Over a third of respondents (36%) liked nothing in particular about the centre, this was followed by 26% who liked the sense of community.

5.33 In terms of dislikes, 24% thought it was unsafe, 20% said nothing in particular and 18% responded with dirty shopping streets.
6 CHRI SP STREET

Healthcheck

Overview

6.1 Chrisp Street is located in the centre of the Borough. It is designated as a district centre in the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. In our view this is appropriate because it provides a supermarket, together with a range of other retail and service outlets for its local community, and is within walking distance of a public transport node (All Saints DLR station).

6.2 The centre contains some 5,090sqm gross comparison floorspace and 3,610 sqm gross convenience floorspace\(^{16}\). It includes a central square with a mixture of retail uses on the ground floor and residential uses above. The centre serves predominately the local community, but also a wider community due to the attraction of the market, which is open Monday to Saturday from 9-4pm with the exception of Thursday 9-12 (half day).

6.3 The key role of the centre is:

- Convenience shopping: The centre contains a Somerfield store with a 1,178sqm net sales area. This serves the local community. There is also a Nisa convenience store.
- Comparison shopping: There are a number of independent stores within the centre, including market stalls which sell a wide range of goods from children’s clothing to soft furnishings. The centre also contains mainstream retailers Boots and Woolworths.
- Other facilities: there are a number of fast food outlets including a fish and chip shop. Other uses include hairdressers and a Barclays bank. There is an Idea store located in the centre which provides library and information services along with lifelong learning opportunities. The centre also includes two pubs.

Rents

6.4 Asking prices of retail units currently on the market suggest Zone A rental values of around £300 - £350 per sqm\(^{17}\). This is similar to rents achieved in Bethnal Green and Roman Road East.

6.5 Rent for market stall pitches in Chrisp Street is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday\(^{18}\). Larger pitches are £6 Monday to Friday, and £45 on a Saturday.

6.6 The valuation office does not publish yield data for Chrisp Street.

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\(^{16}\) Tower Hamlets Council


\(^{18}\) LBTH Market Fact Sheet, September 2007.
**Diversity of Uses**

6.7 **Table 6.1** below presents the aggregate total of units in Chrisp Street centre which are in A Class use, are vacant or in other use.

**Table 6.1 Diversity of use - Chrisp Street**

<table>
<thead>
<tr>
<th>Chrisp Street</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comparison</td>
<td>54</td>
<td>50</td>
</tr>
<tr>
<td>A1 Convenience</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>A4 Drinking establishments</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>A5 Hot food takeaways</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Vacant</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>109</td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets (percentages are rounded)

6.8 50% of the total units in Chrisp Street are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average, 45% of units across all town centres are used for comparison goods. Chrisp Street therefore provides an above average percentage of comparison goods floorspace. 14% of total units are occupied by convenience retailers, this is above the Goad average of 9%.

6.9 Food and drink uses (Classes A3: Restaurants & cafes, A4: Drinking establishments and A5: Hot food takeaways) equate to 18% of the total units in Chrisp Street.

6.10 The Chrisp Street market comprises 80 pitches, mostly selling fruit & vegetables or clothing.

6.11 Chrisp Street is located close to Canary Wharf but complements rather than competes with that centre. Whilst the shops at Canary Wharf are predominantly “high street” and niche brands, shops at Chrisp Street are predominantly independent outlets. The market is also a key element of the Chrisp Street offer.

**Vacancy rates**

6.12 There are no vacant units within the centre\(^{19}\), indicating that this is a relatively healthy centre.

**Accessibility to centre**

6.13 Chrisp Street market is well connected by the DLR and bus services. The centre is located opposite All Saints station and is also within a short walking distance of

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\(^{19}\) At time of healthcheck visit June 2008.
Poplar Station. A number of buses run past the centre connecting Chrisp Street Market to central London and outer London.

6.14 Chrisp Street Market is located on East India Road, which links central London to East London. Traffic can be a problem at peak times. The centre is served by a small car park and also some on street parking.

**Accessibility within the centre**

6.15 Accessibility is high as the area is pedestrianised. However, vans park on Market Square and a number of bollards in this area do make the area feel cluttered.

**Safety and crime**

6.16 At the time of the health check Chrisp Street felt safe. It also benefits from CCTV, however some areas, in particular off the main square, may be intimidating at night.

**Environmental Quality**

6.17 Chrisp Street overall has a pleasant environment. Plenty of seating is available and shop fronts are generally well kept. However, there is some graffiti and some of the paving stones look in need of replacing.

**Development Opportunities**

6.18 There are emerging proposals to redevelop and intensify Chrisp Street, to accommodate new floorspace and improve the retail offer and physical environment.

**Summary of in-centre survey results**

**Trip Characteristics**

6.19 42% of visitors to Chrisp Street travelled there either as the driver or passenger of a car / van. A further 42% walked to the centre. 10% reached the centre by bus.

6.20 Just over a quarter (26%) of respondents visit the centre 2 to 3 days a week. After this, 18% said they didn’t know how often they visited the centre and 16% visited the centre everyday.

6.21 60% of respondents preferred not to say what they were intending to spend in the centre. A further 12% were intending to spend £5-£20 and 10% between £21-£50.

**Purpose for visiting the centre**

6.22 The most popular reason (34%) for visiting the centre was to use the services that are there (e.g. bank, building society, hairdressers), followed by to buy food items (32%) and then to meet someone (8%).

**Markets**

6.23 40% of respondents visit the market whilst 60% do not.

6.24 Of those that do visit the market the majority (60%) liked nothing in particular. A further 10% didn’t know what they liked about the market, 10% liked everything about the market and 10% liked that it was near / convenient.
6.25 The majority of visitors who said they visited the market (70%) disliked nothing in particular. Following this 15% didn’t know what they disliked about the market and 15% said that there is a lack of choice of stalls.

Leisure

6.26 16% of visitors felt that the centre was lacking in a certain type of leisure facility, 30% thought that it wasn’t and 54% didn’t know.

6.27 Of those who thought Chrisp Street was lacking in a certain type of leisure facility, every respondent said that they would like to see a cinema. In addition, 63% felt that more restaurants / cafes were required and 13% wanted a leisure centre and nightclubs.

6.28 None of the visitors felt that the centre had too many of a certain type of leisure facility. 50% didn’t think that it did and 50% didn’t know.

Likes and dislikes

6.29 Over half of the respondents (56%) liked that it was easy to park in the centre. This was followed by 50% who liked that it was near / convenient, 26% who liked everything and 20% who liked the safe environment.

6.30 Nearly three quarters of visitors (74%) disliked nothing in particular about Chrisp Street. 18% didn’t like the lack of choice and 16% stated they disliked the lack of a large supermarket.
7 CROSSHARBOUR

Healthcheck

Overview

7.1 Crossharbour is located on the Isle of Dogs. It is designated as a district centre by the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. The centre comprises only an Asda Superstore and an adjacent pharmacy and so in our view, does not currently fit its designation.

7.2 The key role of Crossharbour is:

- Convenience shopping: Unlike most district centres, Crossharbour provides convenience goods not only for the local population, but also for customers from further afield. The centre does not include any independent convenience retailers.
- Comparison Shopping. The store provides comparison goods which comprise the George clothing and home range and a jewellery counter.
- Other facilities: Within the superstore there is an opticians, photo centre and cafe. Cubitt Town Library is nearby, to the north.

Rents

7.3 There is no evidence of rental values at Crossharbour itself due to the nature of the development, there is however evidence of shop rental values from nearby individual units on the market, that suggests Zone A rental values of around £150 - £250 per sqm, dependant on location and the age of the building\(^{20}\). This is the lowest rental value of any of the district centres.

Diversity of Uses

7.4 The total sales floorspace is 14,681sqm which is made up of 8,221sqm of convenience floorspace and 6,460sqm of comparison floorspace. The convenience floorspace equates to 56% which is significantly above the Goad centre average of 9%. The comparison floorspace of 44% is similar to the Goad average of 45%.

Vacancy rates

7.5 There are no vacant units, however as the centre only consists of the two units this is not a robust indicator of health.

Accessibility to centre

7.6 Crossharbour is in close proximity to Crossharbour Station which is on the Docklands Light Railway. Crossharbour is also served by a number of frequent bus routes.

\(^{20}\) Market Report, September 2008, BPS Surveyors
7.7 The centre is easily accessible from Aspen Way which runs to and from central London and there is a large car park for the Asda Store.

**Accessibility within the centre**

7.8 Accessibility within the centre is high. As it comprises one superstore everything is undercover and pedestrianised. There are a number of crossings provided within the car park and there is disabled access.

**Safety and crime**

7.9 Crossharbour felt safe at the time of the healthcheck visit. There is CCTV present in the car park and it is well lit.

**Environmental Quality**

7.10 Crossharbour district centre is well kept. There was no litter or graffiti at the time of the site visit. Some green space is provided at the edges of the car park. Due to the nature of the centre no street furniture is provided.

**Development Opportunities**

7.11 There is an opportunity to redevelop and intensify the Crossharbour centre, providing a new store with smaller retail units and other uses alongside. This would strengthen Crossharbour and enable it to fulfill its district centre role. However, there are no proposals at present.

**Summary of in-centre survey results**

**Trip Characteristics**

7.12 Nearly three quarters of visitors (72%) travelled to the centre on foot whilst 18% travelled by rail.

7.13 Over a quarter of respondents (26%) visit the centre everyday. After this people visit the centre on 4 to 6 days a week and 2 to 3 days a week (both 24%).

7.14 Over half of the respondents (58%) intended to spend £5-£20. A further 16% were intending to spend less than £5 and 12% £21-£50.

**Purpose for visiting the centre**

7.15 Over half of the visitors (54%) purpose for going to the centre was to buy food items. This was followed by going to work (20%) and then to access the library / public services (8%).

**Leisure**

7.16 28% of respondents thought that the centre was lacking in a certain type of leisure facility, 54% didn’t think it was and 18% said they didn’t know.

7.17 Of those respondents that felt the centre was lacking a certain type of leisure facility, 29% stated a cinema. A further 21% thought it lacked a leisure centre, health and fitness club and parks / green areas.
7.18 None of the respondents thought that the centre had too many of a certain type of leisure facility; 84% felt that it didn't and 16% didn't know.

*Likes and dislikes*

7.19 Over half of respondents (56%) liked the good transport links in the centre. 50% liked that Crossharbour was near / convenient whilst 26% liked the competitive prices. 20% liked that there was a large supermarket in the centre.

7.20 68% of visitors disliked nothing in particular in the centre and 10% thought that there was too much construction work.
8 ROMAN ROAD EAST

Healthcheck

Overview

8.1 Roman Road East is located in the north of the Borough. It is designated as a district centre by the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. Although it provides a range of retail and service outlets for its local community, and is on major bus routes, there is currently no supermarket and so it is not fulfilling its district centre role.

8.2 The district centre is a linear settlement which has developed along Roman Road. The primary shopping area (Roman Road market) is partly pedestrianised with limited access for vehicles. This area is also a designated conservation area due to its historic significance and special character.

8.3 The key role of Roman Road East is:

- Convenience shopping: The centre contains a number of smaller convenience stores including a Costcutter, but no larger supermarket since the closure of Morrison’s at 2 Gladstone Place.
- Comparison Shopping: Roman Road East contains a wide range of independent shops. The only large national chain is a Woolworths. There is a street market.
- Other facilities: The centre contains evening uses such as restaurants and pubs, including a Wetherspoons. The centre also includes a Barclays bank and Nationwide building society.

Rents

8.4 Asking prices of retail units currently on the market suggest Zone A rental values of around £300 per sqm, but evidence is limited.\(^{21}\) This is a similar rental value to Bethnal Green and Chrisp Street.

8.5 Rent for market stall pitches in Roman Road East is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday\(^{22}\).

Diversity of Uses

8.6 Table 8.1 below presents the aggregate total of units in Roman Road centre which are in A class use, are vacant or in other use.

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\(^{21}\) Market Report, September 2008, BPS Surveyors

\(^{22}\) LBTH Market Fact Sheet, September 2007.
<table>
<thead>
<tr>
<th>Roman Road East</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comparison</td>
<td>85</td>
<td>37</td>
</tr>
<tr>
<td>A1 Convenience</td>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>23</td>
<td>10</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>21</td>
<td>9</td>
</tr>
<tr>
<td>A4 Drinking establishments</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>A5 Hot food takeaways</td>
<td>13</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>19</td>
<td>8</td>
</tr>
<tr>
<td>Vacant</td>
<td>44</td>
<td>19</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>231</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets

8.7 36% of the total units in Roman Road East are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average 45% of units across all town centres are used for comparison goods. Roman Road East therefore provides a below average percentage of comparison goods floorspace. 10% of total units are occupied by convenience retailers, this is slightly above the Goad average of 9%.

8.8 Food and drink uses (Classes A3: Restaurants & cafes, A4: Drinking establishments and A5: Hot food takeaways) equate to 15% of the total units in Roman Road East.

8.9 The street market has 262 pitches selling mostly ladieswear, jewellery and household goods.

**Vacancy rates**

8.10 There are 44 vacant units within the centre particularly concentrated in the secondary shopping area. The primary shopping area has a very limited number of vacant units. The largest vacant unit is 2 Gladstone Place, although this has planning permission for a new supermarket.

**Accessibility to centre**

8.11 Roman Road East is served by the number 8 bus which runs the length of the road until Roman Road market and links the area to central London. This service runs regularly and throughout the night. There is also the S2 which runs from the Western boundary of the centre on Parnell Road; this route runs from Stratford to Clapton.
8.12 Mile End and Bow Road underground stations are both approximately 12 minutes away.\(^2\)

8.13 Roman Road carries a steady flow of traffic and congestion does not appear to be a significant problem. The slight exception to this is the junction between Roman Road and St Stephens Road. This area is busy both with pedestrians and traffic flowing in four directions. This junction separates the one way, partly pedestrianised part of Roman Road from the non-pedestrianised Roman Road.

8.14 The area is served by a small car park located at the junction of Roman Road and St Stephens Road. This serves Roman Road market, as well as the secondary shopping area. Roman Road market is shut off to traffic on Tuesdays and Thursdays, therefore parking is not allowed on the street at this time.

**Accessibility within the centre**

8.15 Based on our observations the centre has a steady flow of pedestrians particularly within the primary shopping area which is partly pedestrianised.

8.16 Restricting access to Roman Road on market days allows a free flow of pedestrians and space for the traders to sell their goods.

**Safety and crime**

8.17 At the time of the healthcheck visit, Roman Road East felt safe, and there is CCTV present.

**Environmental Quality**

8.18 There is a marked difference in the environmental quality of the Roman Road Market (primary shopping area) and the secondary shopping area. In the secondary shopping area there is graffiti and the overall appearance is worse than the primary shopping area. However, shop frontages vary considerably in both areas.

8.19 There is good provision of public seating, however litter bins have been vandalised and could do with being replaced. The toilets in the car park and on Roman Road market are also an unattractive feature.

**Development Opportunities**

8.20 The main development opportunity is the supermarket site. There is also an opportunity to perhaps redevelop the vacant units in the secondary area for other uses.

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Summary of in-centre survey results

Trip Characteristics

8.21 Over half (56%) of the visitors surveyed had travelled to the centre on foot. Further to this 24% had travelled by bus and 8% as a car / van driver.

8.22 Nearly a third of respondents (32%) said that they visit the centre everyday. This was followed by 20% who said they visited Roman Road East 2 to 3 days a week.

8.23 42% of visitors intended to spend between £5-£20 in the centre, 26% were intending to spend less than £5 and 16% said they would spend nothing.

Purpose for visiting the centre

8.24 The most popular reason for visiting the centre was to buy non food goods (32%). A further 22% were visiting the centre in order to go to work, 10% to buy food items and 10% to eat out.

Market

8.25 Nearly all (92%) of visitors said that they visit the market whilst 8% said they do not.

8.26 Of those respondents who do visit the market, 41% liked that it is near / convenient, 24% liked the selection of independent stalls and 22% liked nothing in particular.

8.27 20% of visitors disliked that the market was dirty, 17% disliked that the market lacked a choice of stalls and 17% disliked nothing in particular. 15% thought there should be more food stalls.

Leisure

8.28 36% of visitors thought that Roman Road East was lacking in a certain type of leisure facility, 38% thought that it wasn’t and 36% didn’t know.

8.29 Of the visitors that would like to see more of a certain type of leisure facility, youth clubs (39%), a theatre, cinema, health and fitness club and a swimming pool were popular answers.

8.30 10% of visitors thought that the centre had too many of a certain type of leisure facility (with various facilities mentioned), 70% thought it didn’t and 20% didn’t know.

Likes and dislikes

8.31 Half of the respondents (50%) liked that the centre was near / convenient. This was followed by the centre having a sense of community and nothing in particular (both 24%) and good transport links (20%).

8.32 36% of visitors disliked nothing in particular about the centre whilst 20% disliked the dirty shopping streets. 18% felt it was unsafe.

Summary of market traders and shopkeepers survey results

8.33 In 2005, the Council undertook surveys of the market traders in Roman Road.
The market traders felt that the standard of goods sold on the market has declined in recent years, with too many stalls selling the same products. The market no longer attracts people from outside the area. The traders felt that better quality shops, including high street names or a new supermarket, would draw shoppers back, as would a relaxation of the parking measures.

Traders suggested the following improvements:

- Give shoppers four hours free parking
- Upgrade and clean the market area
- Offer one month’s free rent on pitches, to attract new traders
- Reduce pitch costs
- Fit a lighting supply to all stalls
- Provide seating areas and toilets
- Provide better signage
- Promote the market


Over half of the shopkeepers surveyed had been trading in Roman Road for less than five years, and only half expected to stay in the centre (almost one third stated that they expected to relocate in future).

Shopkeepers stated that the local community is the most positive feature of Roman Road (28%), with negative features including crime and safety (34%), poor shops (11%) and parking (11%).

32% of respondents stated that parking improvements are needed to attract more shoppers to the centre and 11% stated that a new supermarket is needed. 53% of respondents said that the introduction of a farmers market would attract shoppers to the centre and 36% said that an arts and crafts market would also attract shoppers.
9 ROMAN ROAD WEST

Healthcheck

Overview

9.1 Roman Road West is located in the central north of the borough. It is designated as a district centre within the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. As with Roman Road East, it provides a range of retail and service outlets for its local community and is on major bus routes, but because there is no supermarket it does not have all the characteristics of a district centre.

9.2 Roman Road West is a linear settlement with the primary frontage incorporating both sides of the road and the secondary shopping frontage incorporating only the northern side of the road.

9.3 The key role of Roman Road West

- Convenience shopping: The centre does not contain any large foodstores but does provide a wide range of smaller specialist convenience stores. These stores are adequate for top up shopping, but not suitable for a weekly shop. There is a market on Roman Road Square selling mostly convenience goods.
- Comparison shopping: The centre provides a number of specialist independent retailers, but no national multiple retailers.
- Other facilities: Roman Road West provides a mixture of other facilities including restaurants, opticians and a doctor’s surgery.

Rents

9.4 No current rental value evidence was available for this area\(^{24}\).

9.5 Rent for market stall pitches in Roman Road West is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday\(^{25}\).

Diversity of Uses

9.6 Table 9.1 below presents the aggregate total of units in Roman Road West centre which are in A Class use, are vacant or in other use.

\(^{24}\) Market Report, September 2008, BPS Surveyors

\(^{25}\) LBTH Market Fact Sheet, September 2007.
Table 9.1 Diversity of use - Roman Road West

<table>
<thead>
<tr>
<th>Roman Road West</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comparison</td>
<td>34</td>
<td>35</td>
</tr>
<tr>
<td>A1 Convenience</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>A4 Drinking establishments</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>A5 Hot food takeaways</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Vacant</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>TOTAL</td>
<td>97</td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets (percentages are rounded)

9.7 35% of the total units in Roman Road West are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average, 45% of floorspace across all town centres is used for comparison goods. Roman Road West therefore provides a below average percentage of comparison goods units. There are 9% of units occupied by convenience retailers which is inline with the Goad average of 9%.

9.8 Food and drink uses (Classes A3: Restaurants & cafes, A4: Drinking establishments and A5: Hot food takeaways) equate to 16% of the total units in Roman Road.

9.9 The market, which sells mostly fresh food, is small with only 28 pitches.

Vacancy rates

9.10 There are only 3 vacant units within the centre\(^{26}\), indicating that this is a relatively healthy centre.

Accessibility to centre

9.11 Roman Road West is located within a 5 minute walk of Bethnal Green underground station, which is situated to the west of the centre. This station is located on the Central Line and provides trains to central London and outer London.

9.12 The area is also served by three main bus services and there are a number of bus stops located along Roman Road. Bus routes run to London Victoria, Canning Town and Crossharbour.

9.13 Roman Road is a main road running from east to west. At the time of the healthcheck the traffic flow was constant, but may become busier at peak time.

\(^{26}\) At time of healthcheck visit June 2008.
Traffic calming measures have been introduced along Roman Road and there is limited (payable) on street parking.

**Accessibility within the centre**

9.14 Based on our observations the centre has a light, but steady flow of pedestrians with the highest pedestrian flow in the primary shopping frontage area.

9.15 There are crossings provided and therefore accessibility is acceptable within the centre.

**Safety and crime**

9.16 At the time of the health check Roman Road West felt safe. There are CCTV cameras in the centre.

**Environmental Quality**

9.17 Roman Road West has undergone some regeneration in recent years which has improved the appearance of the area. However, overall the area is still looking rundown and a number of shop frontages are in need of attention. The flower beds along the primary shopping frontage are looking neglected and are in need of replanting.

9.18 There is good provision of public seating and other street furniture particularly where the traffic calming scheme has been implemented.

**Development Opportunities**

9.19 There is potential to expand the market (which is currently operating at only 30% capacity) and diversify the goods sold.

9.20 In addition, there is potential to redevelop some of the poor quality buildings around the square.

**Summary of in-centre survey results**

**Trip Characteristics**

9.21 The majority of visitors (64%) travelled to the centre on foot, this was followed by 23% who went by bus. Further to this, 7% went by rail or as the driver of a car / van.

9.22 43% of respondents visited the centre on 2 to 3 days a week. After this the next highest response was 34% who said that they visited everyday.

9.23 The majority of respondents (32%) were intending on spending nothing in the centre, 30% intended to spend between £5-£20 and a further 27% said less than £5.
Purpose for visiting the centre

9.24 The most popular reason for visiting Roman Road West was to buy food items (30%). This was followed by 16% who were meeting someone and 14% who were accessing the library / public services.

Market

9.25 61% of visitors said that they visit the market, 39% do not.
9.26 Of those respondents who do visit the market, 33% liked that it was near / convenient. 19% liked everything about the market and 19% liked that there was a good selection of independent stalls and the quality products. 11% liked nothing in particular and 11% that the prices are competitive.
9.27 The majority of respondents (70%) who visit the market disliked nothing in particular. A further 15% disliked a lack of choice of stalls.

Leisure

9.28 36% of respondents felt that the centre was lacking in a certain type of leisure facility, 30% didn’t think it was and 34% didn’t know.
9.29 Of those who thought that the centre was lacking in certain type of leisure activity, 31% thought the centre needed a cinema or leisure centre, 19% said ‘other’ and 13% stated a youth club.
9.30 Nobody thought that the centre had too many of a certain type of leisure facility; 73% thought that it didn’t and 27% didn’t know.

Likes and dislikes

9.31 The aspect of the centre that visitors liked most was that it was near / convenient (41%). This was followed by those who liked its sense of community (31%). 25% of respondents stated that they liked nothing in particular.
9.32 36% of respondents said that they disliked nothing in particular about the centre. The next highest responses were lack of choice (18%), dirty shopping streets (15%) and that the centre was unsafe (11%).
10 WATNEY MARKET

Healthcheck

Overview

10.1 Watney Market is located in the central part of the Borough, immediately east of the City Fringe. It is designated as a district centre within the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. In our view this is appropriate because it provides a supermarket, together with a range of other retail and service outlets, for its local community, and is within walking distance of a public transport node (Shadwell underground & DLR station).

10.2 The key role of Watney Market is:

- Convenience shopping: The centre contains a large (around 5,000sqm net) Iceland store. There are also a number of independent specialist convenience stores.
- Comparison shopping: There are a number of independent stores and market stalls within Watney Market selling goods such as clothes and home furnishings. The only high street chain store is Peacocks.
- Other facilities: There is a public house within the centre and a number of fast food outlets (non-high street chains). The market sells a range of goods including clothing, food and household items.

Rents

10.3 Asking prices of retail units currently on the market suggest Zone A rental values of around £400 per sqm\[27\]. This is one of the higher rental values amongst the district centres.

10.4 Rent for market stall pitches in Watney Market is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday\[28\].

Diversity of uses

10.5 Table 10.1 below presents the aggregate total of units and floorspace in Watney Market centre which are in A Class use, are vacant or in other use.

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\[27\] Market Report, September 2008, BPS Surveyors
\[28\] LBTH Market Fact Sheet, September 2007.
Table 10.1 Diversity of use - Watney Market

<table>
<thead>
<tr>
<th>Watney Market</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comparison</td>
<td>21</td>
<td>75</td>
</tr>
<tr>
<td>A1 Convenience</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>A4 Drinking establishments</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>A5 Hot food takeaways</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Vacant</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>28</td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets (percentages are rounded)

10.6 75% of the total units in Watney Market are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average, 45% of units across all town centres are used for comparison goods. Watney Market therefore has a significantly higher proportion than the national average. The percentage of convenience units (11%) is also above the national average (9%).

10.7 Food and drink uses (Classes A3: Restaurants & cafes, A4: Drinking establishments and A5: Hot food takeaways) equate to 8% of the total units in Watney Market.

10.8 The street market is open Monday to Saturday from 8.30am to 6pm and contains 90 pitches mainly selling clothing, fruit and vegetables and household goods.

**Vacancy rates**

10.9 Watney Market has 2 vacant shop units29. This figure equates to 7% of units, which is below the Goad GB average of 11%. This indicates that the centre is relatively healthy. There are no vacant market stall pitches.

**Accessibility to centre**

10.10 Watney Market is well served by buses, which run to the centre of London and outer London. The buses are at regular intervals as Commercial Road is one of the main thoroughfares into Central London.

10.11 Shadwell underground station is located within 2 minutes walk of the market and is on the Docklands Light Railway and the East London line (currently closed for extension works). Both provide access to central and outer London as well as main line railway stations.

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29 At time of healthcheck visit June 2008.
10.12 The centre is accessible by car, Commercial Road being the nearest major road. Limited free car parking is provided at a lay-by along Commercial Road however there are very limited spaces. There are cycle racks within the market area.

*Accessibility within the centre*

10.13 The centre is pedestrianised and therefore accessibility for pedestrians and cyclists once within the centre is high. There are a number of pedestrian crossings.

*Safety and crime*

10.14 CCTV cameras in Watney Market provide some reassurance for visitors to the centre. At the time of the health check, the area felt safe. The area is well lit and is therefore unlikely to be considered intimidating at night-time. The streets surrounding the site are not as well lit and are likely to feel unsafe.

*Environmental quality*

10.15 Watney Market is relatively clean with minimal litter and graffiti.

10.16 The area to the rear of the market has been recently redeveloped with new paving and modern street furniture including seating, lighting and cycle racks.

10.17 The buildings at Watney Market are of 1960s style and the shops at street level are beneath flats. The buildings face each other with the market located in the courtyard in between. All of the shop fronts are of similar modern style.

10.18 The high level of traffic along Commercial Road has a negative impact upon the centre’s environmental quality to some extent as it results in high noise levels.

*Development Opportunities*

10.19 We are not aware of any current development opportunities.

*Summary of in-centre survey results*

*Trip Characteristics*

10.20 The majority of respondents (58%) travelled to the centre on foot. Following this the next most popular modes of transport were as a car / van driver, bus and bicycle (all 10%).

10.21 Nearly a third of respondents (32%) visited the centre on 2 to 3 days a week and a further 24% visited Watney Market 1 day a week.

10.22 54% of visitors preferred not to say how much they spent in the centre, a further 14% intended to spend £21-£50 and 10% were intending to spend £51-£100.

*Purpose for visiting the centre*

10.23 The majority of respondents were visiting the centre in order to meet someone (44%) which is considerably higher than the other centres surveyed (20% being the next highest in Bethnal Green). This was followed by 32% who said they were buying food items and 10% who were buying non food items.
Market

10.24 70% of respondents said they do visit the market, 30% said they do not.

10.25 Of those that do visit the market over half (51%) liked that it was near / convenient, 25% liked nothing in particular and 23% liked everything about the market.

10.26 The majority of respondents (46%) disliked nothing in particular about the market. Following this 34% disliked the lack of choice of stalls and 26% thought the quality of stalls was inadequate.

Leisure

10.27 14% of visitors thought that Watney Market was lacking a certain type of leisure facility, 30% didn’t think it was and 56% didn’t know.

10.28 Of those visitors that thought the centre was lacking a certain type of leisure facility, everybody thought a cinema was required, with more restaurants / cafes and a leisure centre also stated.

10.29 2% of visitors said that the centre had too many of a certain type of leisure facility (but did not state what it was), 46% thought that it didn’t and 52% didn’t know.

Likes and dislikes

10.30 Nearly three quarters (74%) of respondents liked that Watney Market was near / convenient. 22% liked the sense of community that the centre had.

10.31 40% of respondents disliked that there was a lack of choice in the centre, 40% disliked the lack of a large supermarket and 20% disliked the poor quality of the shops.
11 WHITECHAPEL

Healthcheck

Overview

11.1 Whitechapel is located in the centre of the Borough, immediately east of the City Fringe. It is designated as a district centre within the Tower Hamlets Core Strategy and Development Control Interim Planning Guidance 2007. In our view, this is appropriate because it provides a range of retail and service outlets, including a supermarket, for its local community and is close to a major transport node (Whitechapel underground station).

11.2 The key role of Whitechapel is:

- Convenience shopping: The centre contains a large foodstore operated by Sainsbury, containing around 2,800sqm, and a small foodstore, operated by Budgens containing around 500sqm floorspace. There are also a number of independent specialist convenience stores. Sainsburys provides for main food shopping and Budgens provides for top-up shopping.
- Comparison shopping: There are a number of independent stores within Whitechapel selling goods such as clothes and home furnishings which are largely marketed at the local Bangladeshi population. The street market gives the area its character and its distinctive retail offer. It is very popular with many loyal local shoppers; 30% of customers visit three times a week or more.
- Other facilities: There are a number of high street chain food outlets including McDonalds and KFC and further independent fast food outlets. There are also several betting shops. The Whitechapel library is located within the centre.

Rents

11.3 Asking prices of retail units currently on the market suggest Zone A rental values of between £400 and £750 per sqm, depending on specific location. Whitechapel has the highest rental values of the district centres.

11.4 Rent for market stall pitches in Whitechapel is the standard rate for Tower Hamlets which is £4.50 per day Monday to Friday, and £25 per day on a Saturday.

Retailer requirements

11.5 According to the ‘FOCUS’ property database, which publishes retailer requirements, there are 4 retailers seeking space in Whitechapel. These requirements range from 100 sqm for a coffee shop to 3,700 sqm for a ‘Premier Inn’ hotel. This indicates that national multiple retailers and service providers consider Whitechapel to be a

30 Market Report, September 2008, BPS Surveyors
31 LBTH Market Fact Sheet, September 2007.
desirable centre which is likely to attract sufficient numbers of customers to meet their requirements.

**Diversity of uses**

11.6 Table 11.1 below presents the aggregate total of units and floorspace in Whitechapel centre which are in A Class use, are vacant and in other use.

**Table 11.1 Diversity of use - Whitechapel**

<table>
<thead>
<tr>
<th>Whitechapel</th>
<th>Number of Units</th>
<th>% of Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comparison</td>
<td>85</td>
<td>57</td>
</tr>
<tr>
<td>A1 Convenience</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>A2 Financial and professional</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>A3 Restaurants and cafés</td>
<td>26</td>
<td>17</td>
</tr>
<tr>
<td>A4 Drinking establishments</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>A5 Hot food takeaways</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Vacant</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>TOTAL</td>
<td>150</td>
<td></td>
</tr>
</tbody>
</table>

Source: London Borough of Tower Hamlets (percentages are rounded)

11.7 57% of the total units in Whitechapel are occupied by A1 comparison retailers. The Goad 2007 GB data shows that, on average, 45% of units across all town centres are used for comparison goods. Whitechapel therefore provides an above average percentage of comparison goods units. 6% of the units are occupied by convenience retailers. This is below the Goad national average of 9%.

11.8 Food and drink uses (Classes A3: Restaurants & cafés, A4: Drinking establishments and A5: Hot food takeaways) equate to 28% of the total floorspace in Whitechapel.

11.9 Whitechapel Market has 121 stalls which mainly sell fruit and vegetables, ladieswear and electrical goods.

**Vacancy rates**

11.10 Whitechapel has 1 vacant unit which is currently being refurbished. This equates to a vacancy rate of less than 1%, significantly below the Goad GB average of 11%.

**Accessibility to centre**

11.11 Whitechapel is well served by buses, which run to the centre of London and outer London. The buses are at regular intervals as Whitechapel Road is one of the main thoroughfares into Central London.

11.12 Whitechapel underground station is within the primary shopping area and is on the District Line and the Hammersmith and City line; both provide access to central and
outer London as well as main line railway stations. Whitechapel is very easily accessible for visitors from outside the immediate area.

11.13 Car parking is provided at Sainsbury which is easily accessible from Whitechapel Road. For shoppers not using Sainsbury, public transport is the easiest mode of transport to access the centre. There are cycle lanes along Whitechapel Road and cycle racks next to Sainsbury.

**Accessibility within the centre**

11.14 The main shopping area of Whitechapel is very congested. The pavements are wide but are very busy at peak shopping times and provide a location for the many market stalls.

**Safety and crime**

11.15 CCTV cameras in the Whitechapel centre provide some reassurance for visitors to the centre. At the time of the health check, the area felt quite safe however, there was quite a bit of graffiti evident. The area is well lit and therefore the main street is unlikely to be considered to be intimidating at night-time. The side streets are not as well lit and are likely to feel unsafe.

11.16 Whitechapel experiences some of the highest levels of crime within the Borough\(^{32}\).

**Environmental quality**

11.17 Whitechapel is quite littered with dirty pavements and evidence of graffiti. The area feels quite neglected and many of the buildings are in need of some upgrading.

11.18 There is little street furniture or public seating in the centre.

11.19 The buildings along Whitechapel Road are relatively old and have an interesting and varied architectural style, however many of the buildings have fallen into a poor state of repair and have been replaced with modern shop fronts. The Sainsbury store is a very modern building which has been recently refurbished (summer 2007).

11.20 The high level of traffic at Whitechapel has a negative impact upon the centre’s environmental quality as it results in the centre being very noisy and congested.

11.21 The Whitechapel Market Conservation Area was designated in June 1997. Many of the buildings fronting Whitechapel Road are of architectural and historical importance, and Whitechapel Road itself is an important and historically significant movement route within East London. Many buildings retain their original features above ground level.

**Development opportunities**

11.22 The Whitechapel Masterplan identifies a number of initiatives to tackle the crime and congestion problems in the area. Improvements include the reorganisation of

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the market with new stall structures and ‘block’ layout, to make it easier to cross the road and access bus stops.

11.23 Tower Hamlets markets team plan to work with the local police teams to introduce a market “pod” to support traders, and provide a base for local community police teams. The team will also work with market traders to identify secure storage facilities, implement new loading / unloading systems and continue investigation into provision of parking for market traders.

11.24 The masterplan encourages new shops, cafes and restaurants, to make the centre of Whitechapel feel more lively, welcoming and safe, especially in the evening. In particular, the masterplan encourages new developments with active ground floor uses to the south side of Whitechapel Road and New Road.

**Summary of in-centre survey results**

*Trip Characteristics*

11.25 The majority of visitors (38%) reached the centre on foot, further to this 28% got there by rail and 26% by bus.

11.26 Nearly a third of respondents (32%) visited the centre everyday. Following this the next highest response was 18% who visited the centre 1 day a week.

11.27 The majority of respondents were intending on spending either £5-£20 or nothing in the centre (both 28%). Following this, 24% intended to spend less than £5.

*Purpose for visiting the centre*

11.28 Nearly a third of respondents were visiting the centre for work (32%). This was followed with to buy food items as the second most popular reason (26%) and then to access the library / public services (18%).

*Markets*

11.29 Most (72%) visitors said that they did visit the market whilst 28% did not.

11.30 Of those that did visit the market, the aspects that they liked were that prices are competitive (53%), the selection / choice of independent stalls (44%) and good public transport links and a sense of community (both 36%).

11.31 Of the respondents who did visit the market, the majority (47%) disliked nothing in particular, 33% thought it was dirty and 8% felt it was overcrowded.

*Leisure*

11.32 30% of visitors thought that the centre was lacking in a certain type of leisure facility, 36% felt that it wasn’t and 34% didn’t know.

11.33 Of those who felt that the centre was lacking in a certain type of leisure activity, the majority (33%) said a swimming pool. This was followed by 20% who stated cinema and after this leisure centre, health and fitness centre, youth club and children’s playground.
11.34 The aspect of Whitechapel that visitors liked the most was the transport links (60%). The next highest responses were the market (44%) and the sense of community (38%).

11.35 The majority of visitors (60%) disliked the dirty shopping streets in the centre.
12 SURVEY RESULTS OTHER CENTRES

Neighbourhood Centres

12.1 The Council identifies 16 neighbourhood centres. These are too small for there to be rental data available for them. However, we provide a summary of diversity of use in the table below.

Table 12.1 Neighbourhood Centres - Diversity of use (outlets)

<table>
<thead>
<tr>
<th>A1 Convenience</th>
<th>A1 Comparison</th>
<th>A2-A5 Services</th>
<th>Other</th>
<th>Vacant</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brick Lane</td>
<td>20</td>
<td>52</td>
<td>59</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Columbia Road</td>
<td>2</td>
<td>29</td>
<td>7</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Wapping Lane</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Cleveland Way / Cambridge Hth Rd</td>
<td>10</td>
<td>9</td>
<td>21</td>
<td>13</td>
<td>2</td>
</tr>
<tr>
<td>O'Leary Square</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Whitehorse Lane</td>
<td>3</td>
<td>6</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben Jonson Road</td>
<td>12</td>
<td>14</td>
<td>5</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Westport Street</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salmon Lane</td>
<td>11</td>
<td>6</td>
<td>11</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Stroudley Walk</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Aberfeldy Street</td>
<td>6</td>
<td>6</td>
<td>7</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Poplar High Street</td>
<td>5</td>
<td>8</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Castalia Square Street</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>2</td>
<td>14</td>
</tr>
<tr>
<td>Manchester Road</td>
<td>2</td>
<td>5</td>
<td>4</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Westferry Road &amp; Barkentine Estate</td>
<td>9</td>
<td>5</td>
<td>15</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>96</td>
<td>159</td>
<td>153</td>
<td>51</td>
<td>22</td>
</tr>
</tbody>
</table>

Source: Council data, March 2007

12.2 Brick Lane, located in the west of the Borough, is the largest of the neighbourhood centres with a total of 146 outlets. Because of its size and the range of outlets - a small supermarket, a large number of non retail services and civic functions such as a health centre - Brick Lane has the characteristics of a district rather than a neighbourhood centre.

12.3 The majority of the outlets (59) are A2-A5 services (financial and professional services, restaurants and cafes, drinking establishments and hot food takeaway). The large number of outlets within this use class reflects the centre’s ‘restaurant cluster’ which is located in the north of the designated centre. Further to this a large proportion (52) are A1 comparison units, many of which are independent fabric/tailoring shops. The centre is anchored by the Bangla City foodstore, and there is also a strong representation of independent convenience shops.
12.4 The shop fronts in the area are generally in good condition. The buildings range from Victorian terraces to 1960s/70s blocks.

12.5 The centre is easily accessible for pedestrians and there is good public transport access from both Aldgate East and Liverpool Street underground stations. However, traffic congestion and servicing are problems. There has been some discussion of pedestrianising Brick Lane but this could have safety implications, because people would have to walk to other streets to get taxis.

12.6 A problem in the area is the large number of premises opening late, some with no permission.

12.7 There is a key development opportunity in Brick Lane - the Truman Brewery site. There are currently no proposals or plans for this site.

12.8 An in-centre survey was undertaken in Brick Lane. Over half of visitors (52%) travel to Brick Lane on foot and a further 15% by underground. Further to this 11% travel to the centre by bus or bicycle.

12.9 28% of respondents visit the centre 4 to 6 days a week. 20% visit Brick Lane everyday and 13% visit on 2 to 3 days a week.

12.10 Over half of the respondents (52%) intended to spend £5-£20 in the centre, a further 17% less than £5 and 15% said they were intending to spend nothing.

12.11 The majority of respondents (37%) visit Brick Lane in order to access work, this was the highest proportion for this purpose of the centres surveyed. After this 11% stated their reason as ‘other’ and 9% said it was to buy non food goods.

12.12 56% of visitors said they do use the market whilst 44% do not. Of those visitors that do use the market, over half (53%) liked everything about the market and 13% liked nothing in particular.

12.13 37% of visitors who use the market dislike nothing in particular. 20% think the quality of the stalls is inadequate, 13% think the market is dirty and 13% that there is a lack of choice.

12.14 54% felt that Brick Lane was lacking in a certain type of leisure facility, 37% thought it wasn’t and 9% didn’t know. Of those who felt that the centre was lacking in a certain type of leisure facility, 48% thought this facility was a cinema, 31% a theatre and 13% a leisure centre.

12.15 31% of respondents thought that the centre had too many of a certain type of leisure facility, 57% didn’t think it did and 11% didn’t know. Of the respondents who felt that the centre had too many of a certain type of leisure facility, most said pubs / bars or restaurants / cafes.

12.16 The aspect of Brick Lane that visitors liked most was its good choice of independent retailers (29%). This was the only time that this reason was stated as the most liked aspect in any of the centres. This was followed by the ranges of places to eat (20%), good transport links (13%) and historic buildings (11%).
12.17 Just under a quarter (24%) disliked that Brick Lane had dirty shopping streets, 20% felt it to be unsafe and 20% disliked nothing in particular.

12.18 **Columbia Road** has 49 outlets in total; this is the second highest amount of the neighbourhood centres. The majority of the outlets (29) are A1 comparison with 7 being A2-A5 services and a further 7 being vacant. The centre is located in the north west of the Borough.

12.19 Columbia Road holds a flower market every Sunday morning which operates between 8am-2pm. The majority of the stores in the centre are only open at the same time as the market. Due to its popularity the centre attracts a large number of tourists.

12.20 Columbia Road’s size and its wide catchment (people visit from all over London) means that it does not really fit the description of a neighbourhood centre. However, because the market and many of the shops are only open on Sundays, the centre does not perform the role of a district centre. Also, it is not close to a major transport node, although there are bus routes along nearby Hackney Road.

12.21 The centre is a terraced Victorian street with retail units at ground floor level and residential on the first floor. The buildings have been kept in good condition which enhances the environmental quality of the centre and the colourful shopfronts give the centre a vibrant feel.

12.22 A recent problem for the centre is that the car park at the Technical College on Gossett Street, which used to be available for shoppers’ parking, has closed due to refurbishment. There are strict parking restrictions in the area The shopkeepers have suggested a car parking scheme where they could sell parking credits in the shops allow people to park for 1-2 hours.

12.23 **Wapping Lane**, located in the south west of the Borough, has a total of 17 units. 5 of these are A1 comparison, 5 are A1 convenience and 5 are A2-A5 services. There are no vacant units in the centre. Within the centre there is a good mix of uses and the shop fronts are in excellent condition. The outlets are all at ground floor level and the majority have 3-4 storey residential use above them on both sides of the road.

12.24 In our opinion, Wapping Lane’s designation as a neighbourhood centre is correct, because it provides a range of small shops and services for a local catchment, and is within walking distance of a transport node (Wapping underground station – although this is currently closed due to upgrade work). Local bus routes pass through the centre.

12.25 **Cleveland Way/Cambridge Heath Road** supports 55 units in total of which 21 are A2-A5 services and 10 are A1 convenience. There are 2 vacant units in the centre. The centre is located in the west of the Borough. It is in some ways an ancillary centre to Bethnal Green with more of a cultural focus including artists’ studios and a museum.
12.26 The centre is disjointed, with the small number of shops on Cleveland Way separate from the rest of the centre. The buildings are Victorian, with shopfronts in good condition.

12.27 In our opinion, Cleveland Way/Cambridge Heath Road’s designation as a neighbourhood centre is correct, because it provides a range of small shops and services for a local catchment.

12.28 The centre has good public transport links and can be accessed by bus and from Bethnal Green, Stepney Green or Whitechapel underground stations. The centre has little parking, but as it serves the immediate locality there is a limited need for parking.

12.29 O’Leary Square is located off Mile End Road between Whitechapel and Stepney Green underground stations. It is a parade of shops underneath a housing block.

12.30 It comprises only 6 units. Of these, 2 are A1 convenience, 2 are A2-A5 services, 1 is A1 comparison and 1 is vacant. In our opinion, the limited provision at O’Leary Square means that it does not fulfil a neighbourhood centre role. The centre has a run down appearance and is in poor condition for pedestrians.

12.31 Whitehorse Lane is also located off Mile End Road - to the south of Stepney Green underground station. It comprises retail uses on the ground floor of residential 1960s/70s blocks and is on one side of the road only.

12.32 There are 13 units in the centre, including a Costcutter, DIY centre, pharmacy and café. These are mostly small independent stores and are in good condition. There are no vacant units.

12.33 Nearby (off Mile End Road) is the Anchor Retail Park which includes outlets such as PC World and Currys.

12.34 In our opinion, Whitehorse Lane’s designation as a neighbourhood centre is correct, because it provides a range of small shops and services for a local catchment. The centre is easily accessible by underground from Stepney Green station, or by bus.

12.35 Ben Jonson Road is located approximately 500 metres to the south of Stepney Green and is part of the Ocean Estate.

12.36 The centre has 39 outlets - 14 are A1 comparison and 12 are A1 convenience. Most shops are local independent stores. There are no vacant units.

12.37 The centre comprises ground floor retail units which have residential above them on both sides of the road. The shopfronts are in good condition. The Marmora Block area of the centre is to be redeveloped as part of the Ocean Estate New Deal for Communities; this will increase the amount of retail floorspace in the centre.

12.38 In our opinion, Ben Jonson Road’s designation as a neighbourhood centre is correct, because it provides a range of small shops and services for a local catchment.
12.39 The 309 bus route links the centre with Stepney Green underground station. Parking is provided in the centre. Pedestrian access in the centre is good and assisted by zebra crossings.

12.40 Westport Street is located in the west of the Borough near Limehouse. It comprises only 3 outlets; 2 are A1 convenience and 1 is A1 comparison. These are on the ground floor of a 1960s residential block.

12.41 In our opinion, the limited provision at Westport Street means that it does not fulfil a neighbourhood centre role. The centre is accessible, being only around 400 metres from Limehouse DLR station, but it is very small and so meets a local need only.

12.42 Salmon Lane is also located in the west of the Borough near Limehouse. In total, Salmon Lane has 32 outlets. 11 of the outlets are A2-A5 services, 6 are A1 convenience and 11 are A1 comparison. There is 1 vacant unit in the centre. Again these are on the ground floor of a 1960s/70s residential block.

12.43 Salmon Lane provides a range of small shops and services for a local catchment. The centre is accessible, being located around 400 metres to the north of Limehouse DLR station. The shopfronts and buildings are in reasonably good condition.

12.44 Stroudley Walk is located in Bow, in the north east of the Borough. It has a total of 22 outlets. 7 of these are A1 comparison, 5 are A2-A5 services and 3 are A1 convenience. 2 units are vacant. The centre is located in the north east of the Borough.

12.45 The shops in Stroudley Walk are designed in an unusual fashion with a brick built covered walkway extending out past the front of the shops. The shop fronts are generally in good condition. However the vacant units are boarded up and graffiti is evident. The surrounding environment is not attractive with 1960s blocks dominating.

12.46 In our opinion, Stroudley Walk's designation as a neighbourhood centre is appropriate, because it provides a range of small shops and services for a local catchment. Public transport links are good with Bow Church Docklands Light Railway station being with a 5 minute walk from the centre. Stroudley Walk is part of an area which will be redeveloped by Poplar HARCA.

12.47 Aberfeldy Street is located in the east of the Borough. The centre has 24 outlets in total. 6 are A1 convenience, 6 are A1 comparison and a further 7 are A2-A5 services. The centre has 1 vacant unit.

12.48 The shopfronts are generally in good condition and the environment for pedestrians is adequate. The overall design of the centre is a 1960s purpose built shopping centre.

12.49 In our opinion, Aberfeldy Street's designation as a neighbourhood centre is appropriate, because it provides a range of small shops and services for a local catchment.
12.50 East India and Blackwall DLR stations are located around 500 metres to the south of Aberfeldy Street but the East India Dock Road presents a barrier because there are few crossing points. Similarly, Langdon Park DLR station is around 500 metres to the east but is cut off by the A12 Northern Approach. However there is residents’ parking available and the centre is easily accessible on foot from surrounding housing areas.

12.51 Aberfeldy Street is also part of the area which will be redeveloped by Poplar HARCA.

12.52 **Poplar High Street** is located in the centre of the Borough, north of Canary Wharf. The centre has 18 outlets in total. 8 are A1 comparison, 5 are A1 convenience and a further 5 are A2-A5 services.

12.53 In our opinion, Poplar High Street’s designation as a neighbourhood centre is appropriate, because it provides a range of small shops and services for a local catchment.

12.54 The shops are of a standard design and overall the environment for pedestrians is good. However the standard of housing surrounding the centre is poor and detracts from the overall environment. Poplar High Street is part of the area which will be redeveloped by Poplar HARCA.

12.55 There is pay and display parking along Robin Hood Road. Buses serve the centre and Poplar DLR station is a short walk away. However, the centre is cut off from Canary Wharf by the busy Aspen Way.

12.56 An in-centre survey was carried out in Poplar High Street. 42% of visitors travel there on foot, a further 26% by bus and 16% by DLR. 36% of respondents visit the centre 4 to 6 days a week. The next highest responses were everyday and 1 day a week (both 20%). The majority of visitors intended to spend £5-£20 (34%). Following this 32% said they were intending to spend less than £5 and 20% were intending to spend nothing.

12.57 Nearly a third (32%) of respondents were visiting the centre for the purpose of work. This was followed by 22% who were in the centre to buy food items and 12% who were accessing services (e.g. bank, building society, hairdressers).

12.58 36% of respondents thought that the centre was lacking in a certain type of leisure facility, 46% thought that it wasn’t and 18% didn’t know.

12.59 Those respondents who thought that the centre was lacking in a certain type of leisure facility, half said this was a swimming pool, 33% wanted to see a leisure centre and 16% said a health and fitness club. No visitors thought that the centre had too many of a certain type of leisure facility.

12.60 The majority of respondents (38%) liked nothing in particular about Poplar Street. 30% liked that it was near / convenient and 18% liked the good transport links.

12.61 Just over a quarter (26%) disliked nothing in particular about the centre whilst 18% felt it was unsafe and 14% disliked the dirty shopping streets.
12.62 **Castalia Square** is located on the Isle of Dogs, to the south east of Canary Wharf and around 500 metres north east of Crossharbour. The centre has a total of 14 units. 5 are A1 comparison, 4 are A1 convenience and 3 are A2-A5 services.

12.63 In our opinion, the limited provision at Castalia Square means that it does not fulfil a neighbourhood centre role.

12.64 **Manchester Road** is also located on the Isle of Dogs near to Canary Wharf and Crossharbour. The centre has a total of 12 outlets. 5 of these are A1 comparison, 4 are A2-A5 services and 2 are A1 convenience. The buildings and environment are of reasonable quality. However, in our opinion, the limited provision at Manchester Road means that it does not currently fulfil a neighbourhood centre role.

12.65 **Westferry Road** and the **Barkentine Estate** are two shopping parades located close together on the western side of the Isle of Dogs.

12.66 Together they comprise 31 units, 5 of which are A1 comparison and 9 of which are A1 convenience. 15 of the units are A2-A5 services and 1 is vacant.

12.67 The buildings and environment are of reasonable quality. The centres are easily accessible, being around 500 metres away from South Quay DLR station, but they serve their local area.

**Central Activities Zone (CAZ) Frontages**

12.68 Wentworth Street, located on the western edge of the Borough, is part of the Central Activities Zone (CAZ). The CAZ is defined in the London Plan as a unique cluster of Central London activities with other key uses and activities, such retail.

12.69 The Wentworth Street CAZ covers the area north of Whitechapel Road and west of Commercial Road, including Wentworth, Toynbee, Goulston and Middlesex Streets. It includes 135 outlets, the vast majority of which (104) are A1 comparison retail. There are only 4 A1 convenience units, with 18 A2-A5 service outlets, 1 unit in other use and 9 vacant units.

12.70 There is a market at Wentworth Street which is currently not full, and this could be promoted and possibly extended.

12.71 The CAZ is highly accessible, being close to Whitechapel, Aldgate and Liverpool Street stations. It also has a good quality environment, with well maintained Victorian buildings and shopfronts.

**Bromley by Bow**

12.72 Bromley-by-Bow is located in the north of the Borough. There are two retail areas, separated by the A12 Blackwall Tunnel Northern Approach. On the eastern side is the Tesco store which has a net floorspace of around 3,500sqm. On the western side is Bromley High Street.
There are 22 units at Bromley by Bow; more than half of these (11 units) are in A2-A5 service use. There are 5 A1 convenience outlets, only 1 A12 comparison outlet, and 4 units in other use.

The two retail areas at Bromley-by-Bow are accessible by public transport, being close to the Bromley-by-Bow underground station and the Devons Road and Bow Road DLR stations, but they are poorly connected for pedestrians, because the A12 is busy and can only be crossed by subway. The area as a whole is run down and provides a poor shopping environment.

Bromley-by-Bow does not currently have a designation but the Council's Bromley-by-Bow North Area Action Plan (Draft) states that it should become a new neighbourhood centre with connections over the A12 between the Tesco store and the Bromley-by-Bow underground station, and a mix of uses and activities during the day and evening. A draft masterplan has been produced for the area.
13 NEEDS OF ADDITIONAL RETAIL AND LEISURE FLOORSPACE

Introduction

13.1 In previous sections of this report, we have sought to establish a qualitative perspective on the Tower Hamlets centres. In this section we assess the future capacity for additional retail (comparison and convenience) and leisure floorspace in the Borough by each of the forecast years.

13.2 The base year is 2007 and the forecast years are 2012 and 2017. This is in accordance with PPS6 which states at para. 2.13 that local authorities should assess the need for additional floorspace for five year periods.

13.3 We also assess need at 2025, which is the end date of the London Plan. However, it is important to note that forecasts this far ahead are not robust and so can only provide a broad indication of need.

Retail assessment - approach

13.4 Our assessment is informed by the results from a bespoke household survey undertaken in June 2008 by NEMS Market Research. In developing our methodology, we have drawn on established best practice and our experience in this field. In particular, we focus on the following basic guiding principles:

- The need for a transparent methodology.
- The need to use objective and up to date data inputs.
- The need to justify the use of growth rates and key assumptions used in the analysis.
- The importance of identifying alternative options and objective testing.

13.5 Using these principles, we have employed a step by step approach to the capacity modelling exercise in accordance with standard practice. This can be summarised as follows:

- **Step 1:** The study area has been subdivided into eight zones which reflect, as far as possible, the existing distribution of retail centres.
- **Step 2:** Population estimates have been obtained for each study area zone for the base year (2007) and the forecast years (2012, 2017 and 2025).
- **Step 3:** Locally based per capita expenditure estimates for comparison goods and convenience goods have been obtained for all of the zones within the study area for the base year and the forecast years. All monetary values are maintained constant at 2005 prices.
- **Step 4:** Total available expenditure within each of the study area zones is obtained by combining the population estimates with the expenditure estimates.
- **Step 5:** Composite market shares for the study area for both comparison and convenience goods are derived from the household survey data.
- **Step 6:** The spending pattern within the study area is derived by applying market shares (from the household survey) to the available expenditure for both comparison and convenience goods.
- **Step 7:** The current sales densities of the Borough’s centres are calculated using floorspace data and the market shares derived from the household survey.
- **Step 8:** A Borough-wide floorspace capacity is calculated by deducting legitimate claims on expenditure growth before converting the residual expenditure to a floorspace requirement by applying a typical sales density.

13.6 Below, we explain these steps in detail. We first set out Steps 1 and 2 which are common to the calculations for both comparison and convenience goods shopping requirements. Following this we consider first the comparison goods floorspace requirement, followed by that for convenience goods. All of the tabulations we refer to in the text below are presented as spreadsheets in Appendices 4 and 5.

13.7 Various markets take place in the Borough on particular days of the week, trading primarily comparison items as well as offering some convenience goods and hot-food. In assessing capacity, it is standard practice not to take account of the turnover of the stalls in market places since such markets do not form part of the ‘floorspace’ of a town centre. We appreciate that these markets have a significant qualitative draw for visitors to the centres but, in our view, the presence of such markets should not be used to support a capacity assessment.

**Step 1: Study Area Definition**

13.8 The study area was defined and agreed with the Council officers at the outset of the study. It covers all the wards within Tower Hamlets and extends beyond the Borough boundary in all directions to include elements of Lewisham, Southwark, Newham and the City of London, Hackney and Greenwich (see Figure 3.1). The reason for extending the study area beyond the Tower Hamlets boundary is that shopping patterns are not restricted to the Borough. The survey enables us to define the natural catchment of the Borough’s centres and indicates where there are inflows and outflows of trade.

**Step 2: Study Area Population**

13.9 We have obtained the latest available (2005) postcode-based population data from the Geographic Information System (GIS) database "MapInfo". The population data in MapInfo is sourced from:

- The Office of National Statistics (ONS)
- The Government Actuary Department (GAD)
- The department of Communities and Local Government (CLG)

13.10 MapInfo is the best available source for the detailed population data needed to undertake this assessment.

13.11 To grow the population to the forecast years, we have used the Tower Hamlets growth rates for the Borough, derived from the Greater London Authority (GLA)
report “2007 Round Demographic Projections”. We acknowledge that some parts of the study area lie outside the Borough, where population growth rates may be different. However it is not possible to isolate these areas and to apply different growth rates to them.

13.12 The GLA report sets out two scenarios; “High” and “Low”. As instructed by the Council, we have used the high growth rate and a mid point or medium rate. We have not used the low growth rate because this is unrealistic given the nature of the Borough. The planned increase in employment provision at Canary Wharf and the many development opportunity sites mean that at least a medium level of population growth is likely at the forecast years.

13.13 We have applied the growth rates to the population figures to produce detailed population projections for each survey zone at the base and forecast years (Table 1, Appendices 4 and 5).

13.14 Across the study area as a whole, the population is forecast to increase by between 91,250 (medium) and 144,500 (high) between 2007 and 2017.

**Comparison goods sector**

13.15 Having explained Steps 1 and 2, which are common to both comparison and convenience assessments, we now move on to Steps 3 to 8 for the comparison goods element of our assessment.

**Step 3: Per capita Expenditure Estimates**

13.16 Per capita comparison goods expenditure estimates for each of the study area zones have been sourced using MapInfo. This data is the latest available; 2005 expenditure estimates at 2005 prices. MapInfo estimates are derived from the Office of National Statistics (ONS) Consumer Trends and are compatible with the ONS ‘Blue Book’. The ‘Blue Book’ draws upon a wide range of sources, including the ONS Expenditure & Food Survey (published as Family Spending), the ONS Annual Business Inquiry and the Retail Sales Inquiry.

13.17 Expenditure has been increased to the base year using the actual rate of 5.5% 2005-2006 (MapInfo Briefing Note Feb 07, Table 1).

13.18 Expenditure has then been increased to the forecast years. Both MapInfo and Experian produce expenditure growth rates. MapInfo estimates a comparison expenditure growth rate of 5.3% per annum for the period 2005-2017 (Mapinfo Briefing Note Feb 07, Table 2). Experian estimates 3.5% per annum for the period 2006-2015 (Experian Retail Planner Briefing Note Oct 06). For this study we have chosen to use the Experian growth rate as in our opinion this is more realistic. We provide further explanation of this in Appendix 6. In the absence of a growth rate beyond 2015, we have continued with 3.5% up to 2025.

13.19 The expenditure per capita estimates are presented in Table 2, Appendices 4 and 5. In 2007, the comparison expenditure per capita ranges from around £2,600 (Zones 2 and 8) to around £4,200 per capita (Zone 1).
Step 4: Total expenditure estimates

13.20 Having calculated the per capita expenditure figures in each of the study area zones, we next calculate the total available comparison expenditure in each zone by applying the population forecasts to the per capita expenditure figures. The resulting expenditure estimates are presented in Table 3 (Appendices 4 and 5) and identify the amount of comparison expenditure generated in each study area zone in the forecast years. This provides us with the total ‘pot’ of expenditure within the study area.

13.21 Residents in the study area as a whole spent around £1,200 million on comparison goods in 2007. This is expected to increase to around £2,100 million by 2017.

Step 5: Comparison Composite Market Shares

13.22 We next apply a series of weights to the raw household data to derive a single set of market shares for each centre within the study area and, where appropriate, centres outside the study area. This process is explained in detail in Section 3. The composite market shares, by survey zone, can be found at Table 4 of Appendices 4 and 5.

Step 6: Study Area Spending Pattern

13.23 The spending pattern within the study area is calculated by applying the composite market share estimates (Table 4) to the amount of available expenditure generated from within each zone (Table 3). This allows us to present the study area spending pattern by centre and by zone. The detailed spending pattern is set out in Table 5, Appendices 4 and 5.

Comparison Centres with the Study Area

13.24 We now summarise performance of the main shopping destinations within Tower Hamlets, at 2007. We establish their turnover and their share of the study area’s ‘pot’ of expenditure. The main shopping destinations are set out at Table 13.1 below.

13.25 We have only included one scenario; the high population growth scenario. This is because the figures for each scenario are very similar at this stage.

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33 GLA 2007 Round Demographic Projections, High Scenario and mid-point between High and Low
Table 13.1 HIGH POPULATION GROWTH SCENARIO
Retained Comparison Expenditure - 2007

<table>
<thead>
<tr>
<th>Centre</th>
<th>Comparison Turnover drawn from Study Area Residents 2007 (£m)</th>
<th>Expenditure Market Share in 2007 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canary Wharf</td>
<td>85.3</td>
<td>7</td>
</tr>
<tr>
<td>Chrisp Street</td>
<td>13.4</td>
<td>1</td>
</tr>
<tr>
<td>Watney Market</td>
<td>5.6</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Roman Road (East and West)</td>
<td>17.6</td>
<td>1</td>
</tr>
<tr>
<td>Bethnal Green</td>
<td>32.3</td>
<td>3</td>
</tr>
<tr>
<td>Whitechapel</td>
<td>36.3</td>
<td>3</td>
</tr>
<tr>
<td>Crossharbour</td>
<td>7.2</td>
<td>1</td>
</tr>
<tr>
<td>Other Tower Hamlets</td>
<td>63.5</td>
<td>5</td>
</tr>
<tr>
<td><strong>Total Retained Tower Hamlets Exp.</strong></td>
<td><strong>261.3</strong></td>
<td><strong>21</strong></td>
</tr>
<tr>
<td>Other centres Inside Study Area</td>
<td>75.9</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total Retained Study Area Exp.</strong></td>
<td><strong>337.2</strong></td>
<td><strong>27</strong></td>
</tr>
</tbody>
</table>

Source: Derived from Table 5, Appendix 5 (all data in 2005 prices). Figures may not sum due to rounding.

13.26 As stated, residents of the study area spent around £1,200 million on comparison goods in 2007. Of this, 21% was spent in Tower Hamlets centres and 6% in other centres inside the study area (but outside the Borough boundary).

13.27 Around 7% of study area residents’ expenditure was spent at Canary Wharf (£85m). Bethnal Green and Whitechapel attracted around 3% each; £32 and £36m respectively.

13.28 Of the main centres within the study area but outside the Borough boundary, Greenwich and Surrey Quays attract the most expenditure.

Expenditure Leakage

13.29 In Table 13.2 below, we summarise the expenditure ‘leakage’ from the study area, at 2007. This is study area residents’ expenditure that is spent outside the study area. Again we only present the high population growth scenario at this stage.
Table 13.2 HIGH POPULATION GROWTH SCENARIO

Comparison Expenditure Leakage - 2007

<table>
<thead>
<tr>
<th>Centre</th>
<th>Comparison Turnover drawn from Study Area Residents 2007 (£m)</th>
<th>Expenditure Market Share in 2007 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>West End</td>
<td>244.9</td>
<td>20</td>
</tr>
<tr>
<td>Stratford</td>
<td>66.3</td>
<td>6</td>
</tr>
<tr>
<td>Lewisham</td>
<td>54.0</td>
<td>4</td>
</tr>
<tr>
<td>Lakeside</td>
<td>42.1</td>
<td>3</td>
</tr>
<tr>
<td>Beckton</td>
<td>45.0</td>
<td>4</td>
</tr>
<tr>
<td>Bluewater</td>
<td>24.7</td>
<td>2</td>
</tr>
<tr>
<td>Bromley</td>
<td>12.2</td>
<td>1</td>
</tr>
<tr>
<td>Other Outside Study Area</td>
<td>197.7</td>
<td>17</td>
</tr>
<tr>
<td><strong>Total Leakage to other Centres</strong></td>
<td><strong>687.0</strong></td>
<td><strong>58</strong></td>
</tr>
<tr>
<td>Internet/Mail Order/Catalogue</td>
<td>183.4</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total Leakage</strong></td>
<td><strong>870.3</strong></td>
<td><strong>73</strong></td>
</tr>
</tbody>
</table>

Source: Derived from Table 5, Appendix 5 (all data in 2005 prices). Figures may not sum due to rounding.

13.30 Over half of the study area comparison expenditure is being spent in centres outside. The West End is the most important of these, attracting £245 million of the study area expenditure (20%). We would expect this because of the wide range of shopping available in the West End, and the easy access to it from much of Tower Hamlets. Stratford, just outside the study area, attracts £66 million (6%).

13.31 Special Forms of Trading (SFT) - internet/mail order and catalogue spending - are also ‘leakage’ since this expenditure is not spent in traditional ‘bricks and mortar’ retail floorspace. £183 million (15%) is spent via SFT; a high figure but explained by the lack of shops selling such goods as furniture, carpets and domestic appliances in the Borough.

Step 7: Existing Sales Densities

13.32 Sales density, expressed as £ per sqm net, is calculated by dividing the total comparison turnover of a centre by its net comparison floorspace. This gives an indication of how successfully a centre is trading. A high sales density normally indicates that a centre that is trading strongly, but this must be considered in the context of the centre’s position in the shopping hierarchy.

13.33 Table 6 of Appendices 4 and 5 sets out our calculations of current sales densities for comparison goods for the ‘Major’ and ‘District’ centres in Tower Hamlets. At this stage we need to take account of any inflow of expenditure from beyond the study area. We assume that there will be an inflow of 10% to Canary Wharf, from people who work there but do not live in the study area. This translates to 6% of the total turnover of all centres in Tower Hamlets. We do not assume any inflow to the smaller centres, because they provide for local needs and are unlikely to attract expenditure from outside the study area.
Net floorspace data is sourced as follows:

- Canary Wharf - Experian Goad
- Crossharbour - the Institute of Grocery Retailers (IGD)
- Chrisp Street - Tower Hamlets Council
- Whitechapel (including the Anchor Retail Park), Watney Market, Bethnal Green and Roman Road - London Town Centre Healthchecks 2004, Annex 5 (GLA/Goad figures)

The final column in Table 6 presents current sales densities for each of the centres in the Borough, based on the household survey. Canary Wharf achieves a sales density of around £8,000 per sqm per annum, which is high compared to similar sized centres in other areas that we have studied. This high density probably results from its high income customer base and the specialist/niche brands located there.

The district centres generally trade at around £3,000-£4,000 per sqm per annum, which is around the level that we would expect. Roman Road and Watney Market trade poorly at only £1,300 and £1,100 per sqm per annum respectively. Whitechapel trades well at around £5,500 per sqm per annum - however the floorspace figure for Whitechapel does not include the (popular) street market and so the sales density in reality is probably lower.

**Step 8: Capacity for Comparison Retail Floorspace in Tower Hamlets**

Having assessed the quantum of comparison expenditure growth in the study area and the existing turnover of the Borough’s centres, the next step in the assessment is to calculate the amount of surplus expenditure at each forecast year and convert this to a Borough-wide floorspace requirement.

At this stage two important assumptions should be highlighted. First, the available expenditure and the turnover of the stores within the study area are assumed to be in equilibrium in the base year (2007). This is a conventional assumption in retail capacity assessments, especially when projecting over such a long period as required for the Local Development Framework process.

Second, constant market shares for the study area are assumed. In other words, it is assumed that the centres within the study area will retain their existing share of the comparison goods expenditure in the forecast years. This is a normal 'policy neutral' assumption.

This means that the 21% retention rate (see Table 13.1) stays constant. However because expenditure is forecast to grow year on year, the amount of money that this 21% represents will increase.

**Surplus Expenditure**

The capacity exercise is set out below. It is undertaken in two stages. First, the surplus expenditure to support new floorspace is calculated. Second, this surplus expenditure is converted into a comparison goods floorspace requirement. These calculations are set out at Table 7 of Appendices 4 and 5.
13.42 We have calculated surplus expenditure and in Tables 13.3A and B below we show the key data outputs from Tables 1-6 of Appendices 4 and 5. These figures relate to maintaining a constant market share. They reflect both the population increase and the increase in spend per capita.

Table 13.3A MEDIUM POPULATION GROWTH SCENARIO
Tower Hamlets Comparison Surplus Expenditure - Constant Market Share

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A TH Available Expenditure (£m)</td>
<td>270.5</td>
<td>367.0</td>
<td>471.9</td>
<td>682.0</td>
</tr>
<tr>
<td>B Turnover of TH Shops (£m)</td>
<td>270.5</td>
<td>270.5</td>
<td>270.5</td>
<td>270.5</td>
</tr>
<tr>
<td>C Improvement in Turnover of TH Shops (£m)</td>
<td>0</td>
<td>32.6</td>
<td>69.1</td>
<td>136.8</td>
</tr>
<tr>
<td>D Surplus Expenditure (£m)</td>
<td>0.0</td>
<td>64.0</td>
<td>132.3</td>
<td>274.7</td>
</tr>
</tbody>
</table>

Source: Table 7, Appendix 4 (2005 prices)

Table 13.3B HIGH POPULATION GROWTH SCENARIO
Tower Hamlets Comparison Residual Expenditure - Constant Market Share

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A TH Available Expenditure (£m)</td>
<td>270.9</td>
<td>368.3</td>
<td>475.4</td>
<td>691.1</td>
</tr>
<tr>
<td>B Turnover of TH Shops (£m)</td>
<td>270.9</td>
<td>270.9</td>
<td>270.9</td>
<td>270.9</td>
</tr>
<tr>
<td>C Improvement in Turnover of TH Shops (£m)</td>
<td>0</td>
<td>32.6</td>
<td>69.2</td>
<td>137.0</td>
</tr>
<tr>
<td>D Surplus Expenditure (£m)</td>
<td>0.0</td>
<td>64.8</td>
<td>135.3</td>
<td>283.2</td>
</tr>
</tbody>
</table>

Source: Table 7, Appendix 5 (2005 prices)

13.43 Based on this figure, a summary of the surplus expenditure available to the Borough’s centres is set out below:

- **Tower Hamlets Available Expenditure:** In Row A we show the available expenditure in the base year and the forecast years. The current retention level of Tower Hamlets centres (i.e. not the whole study area) is 21% and we keep this constant in the forecast years. We also make a 6% allowance for inflow expenditure from beyond the study area.

- **Turnover of Tower Hamlets Centres and Improvements in Sales Densities:** Row B sets out the turnover of the existing Tower Hamlets centres. This is assumed to be equilibrium at the base year. This means that the turnover of stores equals the available expenditure, i.e. that there is no over or under trading. In the forecast years the turnover of the existing shops will increase due to improvements in sales densities. The latest Experian guidance forecasts this improvement at 2.3% per annum and we have adopted this figure in this study. The monetary value of this improvement is set out at Row C above.

- **Surplus Expenditure:** Row D sets out the surplus expenditure, which is the available expenditure less the Tower Hamlets centres’ turnover, less a deduction for improvement in sales densities - i.e. $D = A - (B + C)$.

13.44 In 2007, the surplus expenditure is nil due to the assumption that expenditure and turnover of floorspace is in equilibrium. The surplus expenditure increases to between £132 million (medium population growth scenario) and £135 million (high
population growth scenario) in 2017 - there is little difference between the two scenarios.

*Comparison Floorspace Requirements*

13.45 The next stage of the capacity assessment is to convert the surplus expenditure to an indicative floorspace requirement for the Borough as a whole. Our approach is to apply an estimated sales density (or turnover per sqm) to the surplus expenditure calculated above.

13.46 For the purpose of these calculations, we have adopted an estimated sales density of £6,500 per sqm in 2007. This is indicative and assumes that new floorspace provided would be modern town centre floorspace. We then allow for this sales density to increase by 2.3% per annum in the forecast years.

13.47 Applying an estimated sales density to the surplus expenditure provides an indicative floorspace capacity for the Borough (not for the wider study area) for each forecast year as demonstrated in Tables 13.4A and B below.

**Table 13.4A MEDIUM POPULATION GROWTH SCENARIO**
Tower Hamlets Comparison Floorspace Requirements - Constant Market Share

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TH Surplus Expenditure (£m)</strong></td>
<td>0.0</td>
<td>64.0</td>
<td>132.3</td>
<td>274.7</td>
</tr>
<tr>
<td><strong>Estimated Sales Density (£/sqm)</strong></td>
<td>6,500</td>
<td>7,283</td>
<td>8,160</td>
<td>9,788</td>
</tr>
<tr>
<td><strong>Net Floorspace Requirement (sqm)</strong></td>
<td>0</td>
<td>8,787</td>
<td>16,220</td>
<td>28,066</td>
</tr>
</tbody>
</table>

Source: Table 7, Appendix 4 (2005 prices) - figures are rounded

**Table 13.4B HIGH POPULATION GROWTH SCENARIO**
Tower Hamlets Comparison Floorspace Requirements - Constant Market Share

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TH Surplus Expenditure (£m)</strong></td>
<td>0.0</td>
<td>64.8</td>
<td>135.3</td>
<td>283.2</td>
</tr>
<tr>
<td><strong>Estimated Sales Density (£/sqm)</strong></td>
<td>6,500</td>
<td>7,283</td>
<td>8,160</td>
<td>9,788</td>
</tr>
<tr>
<td><strong>Net Floorspace Requirement (sqm)</strong></td>
<td>0</td>
<td>8,900</td>
<td>16,587</td>
<td>28,939</td>
</tr>
</tbody>
</table>

Source: Table 7, Appendix 5 (2005 prices) - figures are rounded

13.48 Our assessment shows that by 2017 there will be a requirement for up to 16,600sqm net of additional comparison floorspace in the Borough - if current market shares are to be retained. The two population growth scenarios produce similar figures.

13.49 There is currently a maximum of around 9,400sqm net retail floorspace which has planning permission but has not yet been built. It is unlikely that all of this will come forward for retail, because many of the permissions are for open A Class use. However, any of these commitments that do come forward will need to be deducted from the total.
Conclusions on Comparison Assessment

13.50 The comparison capacity assessment indicates that there is a quantitative need for new comparison floorspace in the Borough. This need increases year on year and arises as a result of increases in population and consumer expenditure per capita. We recommend that the post 2017 forecasts are treated with caution, since economic forecasts past this date are unreliable and subject to change.

13.51 By 2017 there will be a requirement for up to 16,600sqm net of additional comparison floorspace in the Borough - if current market shares are to be retained.

13.52 There is currently a maximum of around 9,400sqm net of committed floorspace that may come forward for retail development. It is unlikely that all of this will come forward for comparison use but any that does will need to be deducted from the requirement.

13.53 It is important to note that these requirements only relate to quantitative need. There may be scope to provide more floorspace where a qualitative need can be shown, particularly if there will be regeneration benefits.

Convenience goods sector

13.54 Steps 1 and 2 in our methodology are common to both the comparison and convenience goods assessments and therefore we now proceed straight to Step 3.

Step 3: Per capita expenditure estimates

13.55 The per capita convenience goods expenditure estimates for each of the study area zones have, like the comparison goods estimates, been sourced from MapInfo. The data obtained was the latest available; 2005 expenditure estimates at 2005 prices.

13.56 Expenditure has been increased to the base year using the actual rate of 1% 2005-2006 (MapInfo Briefing Note Feb 07, Table 1).

13.57 Expenditure has been increased to the forecast years using the Experian growth rate of 0.7% per annum 2006-2015 (Experian Retail Planner Briefing Note Oct 06). In the absence of a growth rate beyond 2015, we have continued with 0.7% up to 2025. The expenditure calculations are presented in Table 8 of Appendices 4 and 5.

Step 4: Total expenditure estimates

13.58 Having calculated the per capita convenience expenditure for each of the study area zones, we next calculate the total available expenditure in each zone by applying the population forecasts\(^\text{34}\) to the per capita expenditure figures. The resulting total expenditure estimates for each study area zone over the time horizon are presented in Table 9 of Appendices 4 and 5.

\(^\text{34}\) GLA 2007 Round Demographic Projections, High Scenario and mid-point between High and Low
According to the calculations, residents of the study area as a whole spent around £650 million on convenience goods in 2007. This is expected to increase to around £860-870 million by 2017.

**Step 5: Convenience Composite Market Shares**

Our quantitative need assessment has been informed by composite market shares derived from the NEMS household survey. To establish shopping patterns for the study area, we use composite market shares which are derived from the raw survey data. We apply a series of weights to the raw household data to come up with a single set of market shares for each store; this process is explained in detail in Section 3. These market shares can be found at Table 10 of Appendices 4 and 5.

**Step 6: Study Area Spending Pattern**

The convenience goods spending pattern within the study area is calculated by applying the market share estimates (Table 10) to the amount of available expenditure generated within each zone (Table 9). This allows us to present the study area convenience spending pattern by centre and by zone as set out in Table 11 of Appendices 4 and 5. The market shares for convenience retailing are very different from the comparison goods figures due to the more localised nature of food shopping.

**Foodstores in the Study Area**

We now summarise the performance of the main foodstores in the Borough. We establish their turnover and their share of the study area’s ‘pot’ of expenditure. This is set out in Table 13.5 below.

We only present the high population growth scenario at this stage, because the figures are very similar for both scenarios.
Table 13.5 HIGH POPULATION GROWTH SCENARIO

Retained Convenience Expenditure - 2007

<table>
<thead>
<tr>
<th>Foodstore</th>
<th>Turnover drawn from Study Area Residents 2007 (£m)</th>
<th>Expenditure Market Share in 2007 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda, Crossharbour</td>
<td>59.5</td>
<td>9%</td>
</tr>
<tr>
<td>Tesco Metro, Cabot Square, Canary Wharf</td>
<td>6.1</td>
<td>1%</td>
</tr>
<tr>
<td>Waitrose, Canada Square, Canary Wharf</td>
<td>21.5</td>
<td>3%</td>
</tr>
<tr>
<td>Somerfield, Chrisp Street, Poplar</td>
<td>11.3</td>
<td>2%</td>
</tr>
<tr>
<td>Tesco, Bow</td>
<td>51.9</td>
<td>8%</td>
</tr>
<tr>
<td>Iceland, Watney Market</td>
<td>8.2</td>
<td>1%</td>
</tr>
<tr>
<td>Waitrose, St. Katherine’s Dock</td>
<td>19.9</td>
<td>3%</td>
</tr>
<tr>
<td>Sainsbury, Cambridge Heath Road, Whitechapel</td>
<td>81.2</td>
<td>13%</td>
</tr>
<tr>
<td>Tesco Metro, Bethnal Green</td>
<td>41.3</td>
<td>6%</td>
</tr>
<tr>
<td>Other Tower Hamlets stores*</td>
<td>79.6</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Total Retained Borough Expenditure</strong></td>
<td>380.5</td>
<td>59%</td>
</tr>
<tr>
<td>Other stores inside Study Area</td>
<td>82.3</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Total Retained Study Area Expenditure</strong></td>
<td>462.8</td>
<td>72%</td>
</tr>
</tbody>
</table>

Source: Derived from Tables 10 and 11, Appendix 4 (all data in 2005 prices).

* M&S Simply Food at Bank Street, Somerfield Forecourt stores at Bow Road and Shadwell, Budgens at Whitechapel Road, Tesco Express at Spitalfields and independent stores and market stalls across the Borough

** Tesco in Rotherhithe, Co-op and Sainsbury in Greenwich and independent stores and market stalls in Zones 4, 5 and 8.

13.64 As stated, residents of the study area spent around £650 million on convenience goods in 2007. Of this, 59% was spent in Tower Hamlets foodstores, with the most popular stores being Asda (£60 million) and Sainsbury (£80 million). A further 14% was spent at other stores inside the study area (but outside the Borough boundary).

13.65 This suggests a reasonably sustainable convenience shopping pattern with people shopping locally. People are unlikely to travel long distances if they have a good range of foodstores close to home.

13.66 In Table 13.6 below, we summarise the expenditure ‘leakage’ from the study area. This is study area residents’ expenditure that is spent outside it. Again, we present only the high population growth scenario at this stage.
Table 13.6 HIGH POPULATION GROWTH SCENARIO

Convenience Expenditure Leakage - 2007

<table>
<thead>
<tr>
<th>Centre</th>
<th>Convenience Turnover drawn from Study Area Residents 2007 (£m)</th>
<th>Expenditure Market Share in 2007 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda, Marshall Road, Leyton</td>
<td>12.4</td>
<td>2</td>
</tr>
<tr>
<td>Morrisons, The Grove, Stratford</td>
<td>14.7</td>
<td>2</td>
</tr>
<tr>
<td>Sainsburys, The Mall, Stratford</td>
<td>4.8</td>
<td>1</td>
</tr>
<tr>
<td>Tesco, Hackney</td>
<td>19.6</td>
<td>3</td>
</tr>
<tr>
<td>Tesco, Lewisham</td>
<td>11.2</td>
<td>2</td>
</tr>
<tr>
<td>Other outside study area</td>
<td>95.7</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total Leakage to other Centres</strong></td>
<td><strong>158.5</strong></td>
<td><strong>24</strong></td>
</tr>
<tr>
<td>Internet/Mail Order/Catalogue</td>
<td>20.2</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total Leakage</strong></td>
<td><strong>178.7</strong></td>
<td><strong>27</strong></td>
</tr>
</tbody>
</table>

Source: Derived from Tables 10 and 11, Appendix 4 (all data in 2005 prices). Figures may not sum due to rounding.

13.67 Around one quarter of study area residents’ convenience expenditure is being spent at stores outside. Tesco in Hackney is the most important of these, attracting £19 million of the study area expenditure (3%). Morrisons in Stratford and Asda in Leyton are also popular. All these stores lie just outside the study area.

13.68 £20 million (3%) is spent via Special Forms of Trading (SFT) - internet/mail order and catalogue spending. However, convenience goods ordered via the internet often come from the shelves of local stores and so might not strictly be ‘leakage’.

**Step 7: Capacity for Convenience Retail Floorspace in Tower Hamlets**

13.69 The next step in the assessment is to calculate the amount of residual expenditure at each forecast year and convert this to a floorspace requirement for the Borough.

13.70 As with the comparison assessment, two important assumptions should be highlighted. First, the available expenditure and the turnover of the stores within the study area are assumed to be in equilibrium in the base year (2007). This is a conventional assumption in retail capacity assessments, especially when projecting over such a long period as required for the Local Development Framework process.

13.71 Second, constant market shares for the study area are assumed. In other words, it is assumed that the centres within the study area will retain their existing share of the convenience goods expenditure in the forecast years. This is a normal ‘policy neutral’ assumption.

13.72 This means that the 59% retention rate (see Table 13.5) stays constant. However because expenditure is forecast to grow year on year, the amount of money that this 59% represents will increase.

13.73 The capacity exercise is set out below. It is undertaken in two stages. First, the surplus expenditure to support new floorspace is calculated. Second, this surplus
expenditure is converted into a comparison goods floorspace requirement. These calculations are set out at Table 12 of Appendices 4 and 5.

**Surplus Expenditure**

13.74 Tables 13.7A and B set out the surplus expenditure.

**Table 13.7A MEDIUM POPULATION GROWTH SCENARIO**

<table>
<thead>
<tr>
<th>Tower Hamlets Convenience Surplus Expenditure - Constant Market Share</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Available Expenditure - Borough (£m)</td>
<td>394.6</td>
<td>468.5</td>
<td>527.7</td>
<td>617.3</td>
</tr>
<tr>
<td>B Turnover of Foodstores - Borough (£m)</td>
<td>394.6</td>
<td>394.6</td>
<td><strong>394.6</strong></td>
<td>394.6</td>
</tr>
<tr>
<td>C Improvement in Sales Densities (£m)</td>
<td>0</td>
<td>12.0</td>
<td><strong>24.3</strong></td>
<td>44.9</td>
</tr>
<tr>
<td>D Surplus Expenditure (£m)</td>
<td>0.0</td>
<td>61.9</td>
<td><strong>108.8</strong></td>
<td>177.9</td>
</tr>
</tbody>
</table>

Source: Table 12, Appendix 4 (2005 prices)

**Table 13.7B HIGH POPULATION GROWTH SCENARIO**

<table>
<thead>
<tr>
<th>Tower Hamlets Convenience Surplus Expenditure - Constant Market Share</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Available Expenditure - Borough (£m)</td>
<td>395.2</td>
<td>470.1</td>
<td>531.7</td>
<td>625.6</td>
</tr>
<tr>
<td>B Turnover of Foodstores - Borough (£m)</td>
<td>395.2</td>
<td>395.2</td>
<td><strong>395.2</strong></td>
<td>395.2</td>
</tr>
<tr>
<td>C Improvement in Sales Densities (£m)</td>
<td>0</td>
<td>12.0</td>
<td><strong>24.4</strong></td>
<td>44.9</td>
</tr>
<tr>
<td>D Surplus Expenditure (£m)</td>
<td>0.0</td>
<td>62.9</td>
<td><strong>112.1</strong></td>
<td>185.5</td>
</tr>
</tbody>
</table>

Source: Table 12, Appendix 5 (2005 prices)

13.75 A summary of the approach to calculating the residual convenience expenditure (or capacity) for the Borough is set out below:

- **Available Expenditure - Borough:** In Row A we show the available expenditure in the base year and the forecast years. This is the study area expenditure that is currently being spent in the Borough’s stores, with an allowance made for inflow of 5%. The current retention level of the Borough’s stores is 59% and we retain this as constant in the forecast years.

- **Turnover of Foodstores - Borough:** Row B sets out the turnover of the existing foodstores in the Borough. This is assumed to be equilibrium at the base year, which means that the turnover of stores equals the available expenditure, i.e. there is no over or under trading.

- **Improvements in Sales Densities:** The turnover of the stores in the forecast years will increase due to improvements in sales densities. The latest Experian guidance forecasts this improvement at 0.6% per annum, which we have adopted in this study. The monetary value of this improvement is set out at Row C above.

- **Surplus Expenditure:** Row D sets out the surplus expenditure, which is the available expenditure less the turnover of the Borough’s stores and less a deduction for improvement in sales densities - i.e. \( D = A-(B+C) \).
Convenience Floorspace Requirements

13.76 The next stage of the capacity assessment is to convert the surplus expenditure into an indicative floorspace requirement for the Borough. Our approach is to apply an estimated sales density (or turnover per sqm) to the surplus expenditure calculated above. We have adopted an estimated annual sales density of £10,000 per sqm, which is typical for many foodstore operators. This is similar to the average achieved by Sainsbury or Waitrose, less than the average for Tesco or Asda but somewhat more than Somerfield or any of the deep discount operators. To reflect improvements in sales densities, we allow for this sales density to improve by 0.6% per annum, which is consistent with Experian guidance.

13.77 Applying an estimated sales density to the surplus expenditure produces an indicative convenience floorspace capacity for Borough in each forecast year.

13.78 We set out the additional net floorspace requirement in Tables 13.8A and B below.

Table 13.8A MEDIUM POPULATION GROWTH SCENARIO
Tower Hamlets Convenience Floorspace Requirements - Constant Market Share

<table>
<thead>
<tr>
<th>Year</th>
<th>Surplus Expenditure (£m)</th>
<th>Estimated Sales Density (£/sqm)</th>
<th>Net Additional Floorspace Requirement (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>0.0</td>
<td>10,000</td>
<td>0</td>
</tr>
<tr>
<td>2012</td>
<td>61.9</td>
<td>10,304</td>
<td>6,008</td>
</tr>
<tr>
<td>2017</td>
<td>108.8</td>
<td>10,616</td>
<td>10,250</td>
</tr>
<tr>
<td>2025</td>
<td>177.9</td>
<td>11,137</td>
<td>15,971</td>
</tr>
</tbody>
</table>

Source: Table 12, Appendix 4 (2005 prices)

Table 13.8B HIGH POPULATION GROWTH SCENARIO
Tower Hamlets Convenience Floorspace Requirements - Constant Market Share

<table>
<thead>
<tr>
<th>Year</th>
<th>Surplus Expenditure (£m)</th>
<th>Estimated Sales Density (£/sqm)</th>
<th>Net Additional Floorspace Requirement (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>0.0</td>
<td>10,000</td>
<td>0</td>
</tr>
<tr>
<td>2012</td>
<td>62.9</td>
<td>10,304</td>
<td>6,106</td>
</tr>
<tr>
<td>2017</td>
<td>112.1</td>
<td>10,616</td>
<td>10,560</td>
</tr>
<tr>
<td>2025</td>
<td>185.5</td>
<td>11,137</td>
<td>16,656</td>
</tr>
</tbody>
</table>

Source: Table 12, Appendix 5 (2005 prices)

13.79 We forecast a net convenience floorspace requirement for between 10,250sqm (medium population growth scenario) and 10,560sqm (high population growth scenario) by 2017. This is a considerable requirement, equating to approximately three medium sized supermarkets, or a range of local stores and extensions.

13.80 Again, it is important to note that there is a maximum of around 9,400sqm net retail floorspace which has planning permission but has not yet been built. Some of this may come forward for convenience retail and will need to be deducted from the total requirement.

Step 8: Overtrading

13.81 As stated, the above calculations assume “equilibrium” i.e. no over or under trading.
However, next we look at the sales densities of the Borough’s foodstores to see whether, in fact, there is any over or under trading.

We do this by applying “company average” sales densities to the net convenience floorspace of each foodstore in the Borough. Then we compare the actual level of performance of the foodstores against company averages.

Table 13, Appendix 4, shows that overall, the stores are overtrading by around £152 million. The stores which are particularly overtrading are the Sainsbury store at Whitechapel, the Tesco stores at Bromley-by-Bow and Bethnal Green and the Asda store at Crossharbour.

Some stores are shown as undertrading; the Waitrose and Tesco at Canary Wharf, even though we have allowed for 20% of their turnover to be drawn from outside the study area (i.e. from workers at Canary Wharf).

If the total £152 million of overtrading was counted as quantitative need, this would result in a requirement for a further 14,300sqm net of convenience floorspace at 2017.

There have been a series of Secretary of State decisions and High Court decisions that have considered whether overtrading contributes to quantitative need. There is no clear guidance on this matter but the latest decisions indicate that whilst overtrading is a qualitative issue, it can be considered as a material input to the interpretation of whether there is a quantitative need.

A reasonable approach, given the uncertainty around overtrading, could be to include half the overtrading as quantitative need, i.e. a further 7,150sqm net. This would increase the convenience floorspace requirement to up to 17,710sqm net at 2017.

Any applications relying on overtrading should be accompanied by evidence, for example of congestion and queues at existing stores.

Conclusions on Convenience Assessment

In round terms, we forecast a requirement for additional convenience floorspace of some 10,560sqm net for Tower Hamlets in the period to 2017 - if current market shares are to be maintained.

If an allowance is made for overtrading, this will increase the convenience floorspace requirement to around 17,710sqm net at 2017.

There is currently around 9,400sqm net retail floorspace which has planning permission but has not yet been built. If any of this comes forward for convenience retail, it should be deducted from the requirement.

35 From Verdict on Grocery Retailers, 2008
It is important to note that these requirements only relate to quantitative need. There may be scope to provide more floorspace where a qualitative need can be shown, particularly if there will be regeneration benefits.

**Commercial leisure assessment**

*Overview*

At the outset it is worth emphasising the limitations associated with providing quantitative estimates for commercial leisure provision. Whilst it is possible to obtain per capita leisure expenditure data from MapInfo, there are no industry-standard methodologies for modelling and apportioning growth in leisure expenditure. For these reasons, we use a simple approach which concentrates on the broad level of demand and scope for additional commercial leisure facilities.

There are six categories of leisure expenditure - these are known as “COICOPS”:
- Recreation and sport
- Cinemas, theatres and museums
- Games of chance
- Restaurants, cafes and bars
- Hair and personal grooming
- Accommodation services

We have obtained MapInfo leisure expenditure for the whole study area. Expenditure on leisure services is projected to grow by 2.0%, per capita, per annum. We have not included projections of expenditure on accommodation services, because most of this will be spent outside the study area - for this reason we did not include a question on accommodation services in the household survey.

Tables 13.9A and B below show that, between 2007 and 2017, total study area leisure expenditure (excluding expenditure on accommodation services) is projected to grow by around £445 million. The full calculations are included at Tables 14 and 15 of Appendices 4 and 5. We have not allowed for any leisure expenditure inflow from outside the study area in these calculations, although there will be additional expenditure available from workers at Canary Wharf.

Assuming that the Tower Hamlets centres retain their current market share of the various types of leisure expenditure (obtained from the household survey), there will be approximately an additional £66-68 million available at 2017 to support new facilities (or boost existing ones) in the Borough.

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36 Classification of Individual Consumption by Purpose
37 Table 3.2, Retail Planner Briefing Note 3.0 (March 2006), Experian
### Table 13.9A MEDIUM POPULATION GROWTH SCENARIO

#### Tower Hamlets growth in leisure expenditure - constant market share

<table>
<thead>
<tr>
<th>Service</th>
<th>Study Area 2007 (£m)</th>
<th>Study Area 2017 (£m)</th>
<th>Growth 2007-2017 (£m)</th>
<th>TH Market Share (%)</th>
<th>TH Share of Growth 2007-2017 (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreation &amp; sport</td>
<td>41</td>
<td>62</td>
<td>21</td>
<td>15</td>
<td>3.1</td>
</tr>
<tr>
<td>Cinemas, theatres, museums</td>
<td>93</td>
<td>140</td>
<td>47</td>
<td>13</td>
<td>6.1</td>
</tr>
<tr>
<td>Games of chance</td>
<td>72</td>
<td>109</td>
<td>37</td>
<td>1</td>
<td>0.3</td>
</tr>
<tr>
<td>Restaurants/cafes/bars</td>
<td>639</td>
<td>962</td>
<td>323</td>
<td>17</td>
<td>53.9</td>
</tr>
<tr>
<td>Hair &amp; personal grooming</td>
<td>35</td>
<td>52</td>
<td>17</td>
<td>19</td>
<td>3.3</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>880</strong></td>
<td><strong>1,325</strong></td>
<td><strong>445</strong></td>
<td><strong>66.7</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: MapInfo

Note: Restaurant, café and bar expenditure includes spend on take-away meals and contract catering food.

### Table 13.9B HIGH POPULATION GROWTH SCENARIO

#### Tower Hamlets growth in leisure expenditure - constant market share

<table>
<thead>
<tr>
<th>Service</th>
<th>Study Area 2007 (£m)</th>
<th>Study Area 2017 (£m)</th>
<th>Growth 2007-2017 (£m)</th>
<th>TH Market Share (%)</th>
<th>TH Share of Growth 2007-2017 (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreation &amp; sport</td>
<td>41</td>
<td>63</td>
<td>21</td>
<td>15</td>
<td>3.1</td>
</tr>
<tr>
<td>Cinemas, theatres, museums</td>
<td>93</td>
<td>141</td>
<td>48</td>
<td>13</td>
<td>6.2</td>
</tr>
<tr>
<td>Games of chance</td>
<td>73</td>
<td>110</td>
<td>37</td>
<td>1</td>
<td>0.3</td>
</tr>
<tr>
<td>Restaurants/cafes/bars</td>
<td>640</td>
<td>969</td>
<td>329</td>
<td>17</td>
<td>55.0</td>
</tr>
<tr>
<td>Hair &amp; personal grooming</td>
<td>35</td>
<td>52</td>
<td>18</td>
<td>19</td>
<td>3.3</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>882</strong></td>
<td><strong>1,335</strong></td>
<td><strong>453</strong></td>
<td><strong>68.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: MapInfo

Note: Restaurant, café and bar expenditure includes spend on take-away meals and contract catering food.

**Recreation and sport**

13.99 If the Borough’s market share of recreation and sport’ study area expenditure remains the same as present by 2017, there will then be just over £3 million expenditure growth available to support new facilities.
It is likely that this could support at least one additional sports facility by 2017. For example, annual turnovers of health and fitness clubs range from £0.8 million to £4 million per annum\textsuperscript{38}.

The Council is producing a leisure strategy which will consider the Borough-wide demand for new sports facilities and highlight locations where current provision is insufficient.

‘Recreation and sport’ also includes such facilities as bowling alleys and skating rinks, of which there are currently none in the Borough. The projected expenditure growth across the whole study area suggests that there may be scope to provide such a facility.

Cinemas, theatres and museums

Currently, cinemas, theatres and museums in Tower Hamlets have a market share of only 13% of expenditure on this leisure category. If this pattern is maintained, there will be around £6 million of expenditure growth in this category available to Tower Hamlets centres by 2017. This is enough to support at least one new cinema - the annual turnover of an eight-screen cinema is estimated at £2.4 million\textsuperscript{39}, although it can be difficult to attract cinema operators. It is likely that residents who travel to the West End to visit museums and theatres will continue to do so due to the wide range of provision there.

Games of chance

By 2017, the forecasts suggest that there will be only £0.3 million available to support new ‘games of chance’ facilities (e.g. casinos, bingo, amusement arcades) in the Borough. This is because the vast majority of respondents to the household survey said that they do not participate in these activities. It thus appears that there is little scope to provide new facilities in the Borough and we would not recommend this.

Restaurants, cafes and bars

The ‘restaurants, cafes and bars’ category accounts for the largest proportion of leisure spend. Assuming that the Borough’s current market share is maintained at 2017, there will be around £55 million available in this category.

Some of this figure relates to spend on ‘takeaway meals eaten at home’ and ‘contract catering food’ such as meals eaten in staff canteens. We do not know what proportion of expenditure these elements comprise, so we assume it is half. Therefore half the spend relates to actual restaurants, cafes and bars, meaning that there will be around £28 million of expenditure growth available.

\textsuperscript{38} RTP/King Sturge estimate in West Midlands Regional Centres (2006), with Fitness First type operators at the lower end of the range and David Lloyd Leisure Club at the upper end.

\textsuperscript{39} RTP/King Sturge estimate in West Midlands Regional Centres (2006), from Dodona research
13.107 Making the standard assumption that restaurant, café and bar floorspace has a turnover of between £0.5 and £1 million per annum (for branded outlets), this would support between 30 and 55 new outlets in the Borough over the next ten years.

13.108 Restaurant, café and bar floorspace is included as part of the Wood Wharf proposal, but the amount of floorspace / number of outlets has not yet been defined.

13.109 The proliferation of fast food outlets (A3 uses) in some centres has diluted the retail offer and caused problems with litter and noise. The Council may wish to restrict these uses.

**Hair and personal grooming**

13.110 If the Borough’s market share of ‘hair and personal grooming’ study area expenditure remains the same in 2017 there will be around £3 million available to support new facilities. This can be met by a range of provision at the local level.

**Accommodation services**

13.111 There is a wide range of hotels in Tower Hamlets, with concentrations in the Docklands and City Fringe. Expenditure generated by residents of the study area will primarily support such services outside the study area which residents will visit on leisure or business trips, and thus is not a good indicator of local demand.

13.112 The GLA’s report Demand and Capacity for Hotels and Conference Centres in London (2002) found that there were around 1,500 hotel bedrooms in the Borough and that this was set to more than double. The large quantum of office development proposed in the Borough is likely to increase demand. However, many hotel applications have been submitted in recent years, so there is a need to manage provision. The Wood Wharf proposal at Canary Wharf includes a 200 bed hotel.
14 CONCLUSIONS

Context

14.1 Tower Hamlets will experience high population and employment growth over the next 20 years. This will mean a need for more retail and leisure provision, and for different types of provision. It is important that the Borough’s centres are accessible to all and that both existing and new residents are catered for.

14.2 Tower Hamlets currently has one centre defined as “major” (Canary Wharf), seven as “district” (Bethnal Green, Chrissp Street, Crossharbour, Roman Road East, Roman Road West, Watney Market and Whitechapel) and 16 as “neighbourhood”. There are also Central Activities Zone frontages on and around Wentworth Street.

14.3 This existing centre network is as defined in the Tower Hamlets Unitary Development Plan 1998. However, over time, the role and function of several of the centres has changed. The London Plan requires the Council to “consider the network of centres (i.e. the pattern of provision of different centres) and their relationship in the hierarchy. At both regional and local level, authorities should plan carefully how best to distribute any identified growth to achieve the objectives of their spatial strategies”.

14.4 The Study Area retains 27% of comparison expenditure, with 21% of this going to Tower Hamlets centres. Although this sounds low, it is what we would expect for an Inner London Borough and it reflects the proximity of and relative ease of accessibility to the West End. However, there could be some scope to increase it if the Borough’s retail offer is improved.

14.5 The Study Area retains 73% of convenience expenditure, with 59% going to foodstores in Tower Hamlets. This is a healthy level of retention, around what we would expect for a London Borough, reflecting the fact that there are popular supermarkets in the Borough as well as a range of street markets and small independent stores. An important point is that some areas are lacking in supermarket provision which means that several of the stores overtrade.

14.6 The main threat to the Borough’s centres is the new Stratford City development to the east of the Borough which will provide over 150,000sqm of retail floorspace. However, there are also opportunities including the decision for east London to host the 2012 Olympic and Paralympic Games, which will bring regeneration and benefits.

14.7 It is not yet known what the effects of the current recession will be on long term retail growth. However, it is important to note that new retail developments are likely to come forward more slowly than originally planned.

14.8 In this context, the conclusions of the study are set out below.
Borough-wide

Comparison goods retailing

14.9 The comparison capacity assessment indicates that there is a quantitative need for new comparison floorspace in the Borough. This need increases year on year and arises as a result of increases in population and consumer expenditure per capita. We recommend that the post 2017 forecasts are treated with caution, since economic forecasts past this date are unreliable and subject to change.

14.10 By 2017 there will be a requirement for up to 16,600sqm net of additional comparison floorspace in the Borough - if current market shares are to be maintained. This requirement should be set out in the Core Strategy.

14.11 It is important to note that:

- Although Tower Hamlets’ current market share is as we would expect for an Inner London Borough, there could be some scope to increase it if the Borough’s retail offer is improved. This would increase the floorspace requirement.
- These requirements only relate to quantitative need. There may be scope to provide more floorspace where a qualitative need can be shown, particularly if there will be regeneration benefits.

14.12 There is currently a maximum of around 9,400sqm net of committed floorspace that may come forward for retail development. It is unlikely that all of this will come forward for comparison use but any that does will need to be deducted from the requirement.

14.13 In our view the priority should be to locate new floorspace at:

- Canary Wharf, which should be allowed to strengthen and grow in line with its “major centre” designation, to become a high profile east London shopping destination.
- Chrisp Street, which is dated and would benefit from redevelopment - although any redevelopment should continue to provide an offer which serves the needs of the local population, and complements rather than competes with Canary Wharf.
- Brick Lane, Bethnal Green and Crossharbour, where there is scope to strengthen and improve the retail offer.
- Bromley by Bow, if this is developed as a new district centre.

14.14 This should not preclude retail development coming forward in other district centres within centre boundaries.

14.15 Small scale developments in the district and neighbourhood centres should generally be permitted.

14.16 Applicants for new comparison floorspace should be required to adopt the sequential approach towards site location, with town centre sites being the most
preferable, followed by edge-of-centre sites. Any new provision should be of a scale appropriate to the size and function of the centre.

### Convenience goods retailing

14.17 In round terms, we forecast a requirement for additional convenience floorspace of some 10,560sqm net for Tower Hamlets in the period to 2017 - if current market shares are to be maintained.

14.18 However, the Borough’s stores are currently overtrading by over £150 million. There is a lack of clear Government guidance as whether or not overtrading constitutes quantitative need. Whether or not to take overtrading into account is a policy decision for the Council, but in our opinion, allowing for half of the overtrading to be counted as need could be a reasonable approach. This would increase the requirement to up to 17,710sqm net of new convenience floorspace by 2017. This requirement should be set out in the Core Strategy.

14.19 In our view, the priority should be to locate new provision at:
- Bethnal Green and Roman Road East, where current provision is poor.
- Whitechapel, Bromley by Bow and Crossharbour, where the existing supermarkets (Sainsbury, Tesco and Asda) are overtrading. The stores should be encouraged to extend/redevelop.

14.20 This should not preclude retail development coming forward in other designated centres within centre boundaries.

14.21 As noted, there is currently around 9,400sqm net retail floorspace which has planning permission but has not yet been built. If any of this comes forward for convenience retail, it should be deducted from the requirement.

14.22 Smaller scale developments in district or neighbourhood centres should generally be permitted, as should small stores to support new housing developments.

14.23 Applicants for new convenience floorspace should be required to adopt the sequential approach towards site location, with town centre sites being the most preferable, followed by edge-of-centre sites. Any new provision should be of a scale appropriate to the size and function of the centre.

14.24 Any applications that rely significantly on overtrading should be supplemented by further qualitative evidence. Such evidence might include field observations and consumer surveys relating to customer attitudes, congestion within stores and car parks, and pedestrian-vehicular conflicts.

14.25 We recommend that any new planning permission for a new foodstore or extension should be subject to a condition restricting the amount of floorspace that can be dedicated to the sale of comparison goods, to protect the vitality and viability of existing comparison retailers and encourage linked trips.

### Independent retailers

14.26 Independent retailers are an important part of the Borough’s offer and are key attractors in some centres (for example almost one-third of respondents to the in-
centre survey in Brick Lane stated that they liked the independent / specialist provision there). The Council has recognised this by producing the Quirky Shopping Guide and marketing the Borough’s independent shops.

14.27 The Council could consider requiring applicants for large retail schemes to include some small units, at lower rents, to be occupied by independent retailers.

**Street markets**

14.28 Street markets are also an important part of the Borough’s offer, and are generally well used. In some centres they are the key attractor (for example, 44% of respondents to the in-centre survey in Whitechapel stated that they like the market there). They provide affordable goods for lower income residents. As well as this economic role, they often strengthen a centre’s social role - high proportions of respondents to the in-centre surveys in Whitechapel and Bethnal Green, where there are large markets, stated that they did not intend to buy anything, they were just visiting, meeting someone or there for no particular reason.

14.29 Markets need continued good management in order to fulfil their role. In order for the markets to continue to operate, they may need to be funded by the Council, as happens in other Boroughs.

**Leisure**

14.30 If the Borough retains its current market share of “recreation and sport” expenditure, there will be just over £3 million available to support new facilities. This could support at least one additional sports facility.

14.31 The Council is producing a leisure strategy which will consider the Borough-wide demand for new sports facilities and highlight locations where current provision is insufficient.

14.32 There may also be scope to provide new facilities such as a bowling alley or skating rink. An All Star Lanes bowling alley opened in November 2008 in Brick Lane.

14.33 If the Borough retains its current market share of study area expenditure on “cinemas, theatres and museums”, there will be some £6 million of expenditure growth in this category available to the centres by 2017. This is enough to support at least one new cinema, although it can be difficult to attract cinema operators.

14.34 It is likely that the West End will continue to be the main destination for museums and theatres because of the wide range of provision available there.

14.35 By 2017, the forecasts suggest that there will be only £0.3 million available to support new “games of chance” facilities (e.g. casinos, bingo, amusement arcades). This is because the vast majority of respondents to the household survey said that they do not participate in these activities. It thus appears that there is little scope to provide new facilities in the Borough and we would not recommend this.

14.36 If the Borough retains its current market share of Study Area expenditure on “restaurants, cafes and bars”, there will be around £28 million of expenditure growth available to the centres in 2017. This could support between 30 and 55 new outlets.
New restaurant, café and bar use could help to strengthen and diversify some of the centres, in particular Roman Road. Some new outlets will be provided as part of the Wood Wharf development, although the quantum has not yet been defined.

14.37 The proliferation of fast food outlets (A3 uses) in some centres has diluted the retail offer and caused problems with litter and noise. The Council may wish to restrict these uses.

14.38 There will be around £3 million available to support new “hair and personal grooming” facilities. This can be met by a range of local provision.

14.39 There is a wide range of hotels in Tower Hamlets, with concentrations in the Docklands and City Fringe. Expenditure generated by residents of the study area will primarily support such services outside the study area which residents will visit on leisure or business trips, and thus is not a good indicator of local demand.

14.40 It is likely that there will be demand for new hotels up to 2017, especially considering the large quantum of office development proposed in the Borough. However, many hotel applications have been submitted in recent years, so there is a need to manage provision. The Wood Wharf proposal at Canary Wharf includes a 200 bed hotel.

**Centre designations**

14.41 The table below sets out some suggested criteria for the designation of centres in Tower Hamlets. These are informed by the definitions in PPS6 (2005) and the London Plan (2008) and by the definitions that the Council has used in the past.
### Table 14.1 Centre designation criteria

<table>
<thead>
<tr>
<th>Designation</th>
<th>Designation Criteria</th>
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<tbody>
<tr>
<td><strong>Activity Area</strong></td>
<td>In areas where the intensity, scale and continuity of current and future town centre activity and land use and intensity of development is far above the average levels found outside Central London.</td>
</tr>
<tr>
<td><strong>Major Centre</strong></td>
<td>Serves a borough-wide catchment and is normally the principal centre in the authority’s catchment area.</td>
</tr>
<tr>
<td></td>
<td>Contains a mix of comparison and convenience retailing and some leisure &amp; entertainment functions</td>
</tr>
<tr>
<td></td>
<td>Has over 50,000 sq metres of retail floorspace and is of sufficient scale for there distinct parts to the centre</td>
</tr>
<tr>
<td></td>
<td>Is within walking distance to a transport node and major bus routes, with a very level of accessibility and located upon or close to the strategic road network</td>
</tr>
<tr>
<td><strong>District Centre</strong></td>
<td>Serves local communities (walking distance, bus ride or short drive)</td>
</tr>
<tr>
<td></td>
<td>Contain at least one supermarket and a range of non-retail services such as a bank, café and restaurants</td>
</tr>
<tr>
<td></td>
<td>Contain civic functions, such as a post-office, health facility, library or community centre</td>
</tr>
<tr>
<td></td>
<td>Walking distance to a transport node and major bus routes, with a high level of accessibility, and located upon or close to the strategic road network</td>
</tr>
<tr>
<td><strong>Neighbourhood Centre</strong></td>
<td>Serves a very local catchment (within 400 metres or a ten minute walk)</td>
</tr>
<tr>
<td></td>
<td>Contain a range of small shops such as a small supermarket, pharmacy, sub-post office or a launderette</td>
</tr>
<tr>
<td></td>
<td>Is within walking distance to a transport node or on a major bus route/s</td>
</tr>
</tbody>
</table>

14.42 The healthcheck work found that some centres are fulfilling their roles as designated and some are not. Of those which are not, some have potential to be developed further to perform a greater role, especially where large population and employment increases are planned.

14.43 Below, we set out the suggested hierarchy.
Central Activities Zone (CAZ)

14.44 The CAZ is an important part of the Borough, being a focus for Central London business and retail activities and a link with the City. The Council should continue with the existing policy approach of encouraging mixed use development here.

14.45 There is scope for extending the CAZ along Commercial Road and also into Aldgate - as part of the Aldgate Masterplan. There is a market at Wentworth Street which is currently not full, and this could be promoted and possibly extended.

Tower Hamlets Activity Area

14.46 This would be a new designation, in two locations:
- City Fringe
- Canary Wharf

14.47 In the case of the City Fringe, the area has a fine grain character, with mixed uses in smaller units - it does not have large floorplates. Further mixed uses of a small scale could be encouraged in this area. The Council can continue to direct anchor stores and large retail units to the defined centres in the area, such as Brick Lane.

14.48 In the case of Canary Wharf, small scale mixed uses could be encouraged in the area bordering the centre, to help blend the centre into its surroundings.

14.49 Policies should define “mixed uses” and have a floorspace cap.

Major Centre

Canary Wharf

14.50 Canary Wharf is a predominantly comparison shopping destination, providing a range of national multiples with a focus on clothing and shoe shops. It also provides leisure facilities including a cinema and a range of bars and restaurants. It is an office location and therefore provides shopping facilities both for east London residents and for employees. The centre is performing well with zero vacancy and rents outperforming other major centres in east and south London.

14.51 The designation of Canary Wharf as a “major centre” is appropriate and should be carried forward into the Core Strategy. However, the Council should enable the centre to expand and strengthen in order to fulfil its potential as one of the main shopping and leisure destinations in east London, for residents as well as workers.

14.52 It is important to note that there will be significant competition from the Stratford City development, which will include department stores and a wide range of multiple retailers. This could limit developer and occupier interest in Canary Wharf, but the inclusion of premium retailers at Jubilee Place and its strong leisure offer should help to differentiate it from Stratford City.

14.53 Canary Wharf does not currently have a specific retail designation on the Proposals Map, it is designated as a “Central Area Zone” where larger retail and business developments will be sought in the form of mixed used development. The Council
could consider defining a retail core, and separately a fringe area (Tower Hamlets Activity Area, as discussed above).

14.54 As demonstrated by the in-centre survey, Canary Wharf is a sustainable destination; 65% of respondents had arrived by underground/DLR or bus. It is highly accessible by public transport both from Tower Hamlets and from other Boroughs. However, it is difficult to access from its immediate surroundings, especially the north, where Aspen Way is a barrier. Therefore, pedestrian links should be improved and in particular, better access across Aspen Way should be provided.

14.55 The centre currently provides a pleasant shopping environment and any extensions should meet this high standard.

**District Centres**

*Bethnal Green*

14.56 Bethnal Green is a convenience and comparison shopping destination, providing mainly independent specialist stores and market stalls, as well as services such as banks. The centre is performing reasonably well with zero vacancy, average rents and one of the higher sales densities of the district centres.

14.57 The designation of Bethnal Green as a “district centre” is appropriate and should be carried forward into the Core Strategy. The Council should consider extending the boundary eastwards to take in the development site near the underground and the civic uses on Cambridge Heath Road.

14.58 There is potential to improve the retail offer at Bethnal Green, by merging units to provide some large modern outlets to complement the existing small shops, and possibly providing some new units. Additional civic uses could be provided in the eastern part of the centre.

14.59 The market is popular and sells a diverse range of goods. However its location means that the pavements are crowded and that it is difficult to cross the road. The Council should consider altering the road configuration to improve safety. In addition, traders currently do not have adequate storage space.

14.60 The in-centre survey showed that respondents have concerns about safety and dirty shopping streets. There is scope for some public realm improvements and better street management.

*Chirsp Street*

14.61 Chirsp Street is a convenience and comparison shopping destination, providing mainly independent stores and market stalls, as well as services. The centre is performing reasonably well with zero vacancy, average rents and one of the higher sales densities of the district centres. The designation of Chirsp Street as a “district centre” is appropriate and should be carried forward into the Core Strategy.

14.62 In order for Chirsp Street to continue to serve the needs of its local community as well as its growing surrounding population, the Council should consider allocating
the centre for redevelopment, with a possible boundary extension. There is scope to improve and extend the centre, backed up by respondents to the in-centre survey who stated that they would like a wider choice of shops and a larger supermarket.

14.63 We recommend a retail led redevelopment for the centre that retains existing anchors, accommodates new retail floorspace and improves the retail offer through the provision of larger units.

14.64 It is important that Chrisp Street continues to fulfil a district centre role with a range of shops to meet the needs of its local residents. Provision should complement rather than compete with Canary Wharf. The development should also include:

- Retention of and improvements to the market, which is a unique attraction to the centre and adds to the variety of the retail offer.
- Strengthening of the civic offer
- Provision of leisure and A3-A5 uses, possibly including evening uses
- Retention of some smaller units to provide for independent and specialist retailers.

14.65 Chrisp Street provides a reasonable and well kept shopping environment. Most respondents to the in-centre survey did not state any dislikes about the environmental quality. However, there will be potential for upgrading, better layout and better signage as part of any redevelopment.

14.66 Poplar HARCA have embarked on a process of re-shaping Chrisp Street to regenerate the area.

**Crossharbour**

14.67 Crossharbour consists of an Asda superstore and adjacent pharmacy. The store is currently overtrading.

14.68 The designation of Crossharbour as a “district centre” should be carried forward into the LDF. However, the centre is not currently performing the role of a district centre and so the Council should consider allocating it for redevelopment and extension. The aim should be to encourage a mixed use centre providing a range of convenience and comparison shops, and services, with Asda as the anchor. The boundary could be extended.

14.69 There is also potential to provide civic uses to meet local needs. The Primary Care Trust are considering locating a health facility in the area.

14.70 Accessibility and environmental quality is good and should be maintained in the event of redevelopment.

**Roman Road East**

14.71 Roman Road East is a convenience and comparison shopping destination, mostly comprising independent shops and market stalls. The centre performs poorly with 44 vacant units including a large vacant supermarket unit, and one of the lowest sales densities amongst the district centres.
14.72 The designation of Roman Road East as a “district centre” should be carried forward into the Core Strategy but with the aim of diversifying its role as a specialist centre focused on the street market - perhaps with more food and drink outlets and specialist food shops. There is currently a mismatch in terms of the offer of Roman Road East and the demographics of the surrounding area. There is a need to consider what is not currently on offer that is needed.

14.73 The centre boundary could be redefined to exclude the existing “fringe area”. This would enable these units to be redeveloped for other uses such as employment and/or residential and would give the centre a focus. The large vacant site (Gladstone Place) already has planning permission for a new foodstore, so this will improve the centre’s attraction.

14.74 The “core area” of the centre provides a good shopping environment, although there is scope for some upgrading. Accessibility to Roman Road East is poor (or at least perceived that way) but work underway for High Street 2012 may improve this.

**Roman Road West**

14.75 Roman Road West is a convenience and comparison shopping destination, mostly comprising independent shops and market stalls. Although it has a low sales density, vacancy is low.

14.76 The designation of Roman Road West as a “district centre” should be carried forward into the Core Strategy. A complementary role to Roman Road East should be developed. The Council could encourage more boutique shops, restaurants and service uses. The market, located on the public square, is only operating at 30% capacity so there is scope to improve and strengthen it. Some of the poor quality buildings around the square could provide redevelopment opportunities.

14.77 Accessibility is good but the centre would benefit from some public realm improvements in particular shop front upgrades, as well as better street management.

**Watney Market**

14.78 Watney Market is a convenience and comparison shopping destination, focused on the street market. It is performing well, with a low vacancy rate and one of the higher rental values amongst the district centres.

14.79 The designation of Watney Market as a “district centre” is appropriate and should be carried forward into the Core Strategy. The Council should consider extending the boundary. There is also potential for more civic uses in the centre.

14.80 Accessibility and environmental quality are good, although some management of traffic and parking would benefit the centre. The large underground car park is currently closed because of problems with anti social behaviour. The Council should look at resolving these problems, because the car park is an asset which could support the centre.

14.81 The intensity of use at Watney Market means that the public realm gets worn and damaged quickly, and requires ongoing investment and management.
Whitechapel

14.82 Whitechapel has a strong convenience shopping role, with two foodstores. It also contains a number of independent specialist stores as well as a popular street market. It is performing well with a very low vacancy rate and the highest rental values and sales density amongst the district centres.

14.83 The designation of Whitechapel as a “district centre” is appropriate and should be carried forward into the Core Strategy. There is potential to strengthen the retail offer at Whitechapel and provide more civic uses. Redevelopment of the south side of the centre is already being promoted, by the Whitechapel Masterplan.

14.84 The location of the market causes some problems such as overcrowding on the pavement, so a covered market, to accommodate the fruit and vegetable traders and leave more space on the pavement, should be considered.

14.85 As set out in the Whitechapel Masterplan, the centre would benefit from improved public spaces and improvements to the built environment, particularly in the historic centre of the area. Better street management to keep streets clean and manage congestion, would also benefit the centre.

Brick Lane

14.86 Brick Lane should be upgraded to a district centre due to its large size. The Council should consider extending the boundary. The Truman Brewery site should be included in the centre because it may present a development opportunity in the future.

14.87 Although Brick Lane is in the CAZ, designating it as a district centre will provide a focus for larger retail units and civic uses and will allow the area to be managed.

14.88 The northern part of the centre could be designated as an “evening uses” zone, to provide a focus for food and drink uses and enable the growth of such uses to be managed. The unlicensed late opening of bars has become a problem in recent years.

14.89 The Brick Lane market is popular, and the Council could investigate allowing it to open on Saturdays, which would spread market activity across the weekend and make use of the high Saturday footfall.

14.90 There is a need for improved signage to Brick Lane from the surrounding area. Pedestrianisation of Brick Lane has been discussed in the past but this could have safety implications because people would have to walk to other streets to get taxis.

14.91 The Council is proposing a "Cultural Trail" through Brick Lane, which would re-enforce the Banglatown identity. It would include a series of arches, designed themed street furniture to reflect the local culture and a minaret structure. This could help to generate inward investment and attract more tourists and visitors.
**Neighbourhood centres**

14.92 **Columbia Road** is an important tourist centre and is very popular. Although it is large for a neighbourhood centre, it would not be appropriate to upgrade it to a district centre because it has a different function - also it is not open every day.

14.93 The market is its key attractor. It lacks diversity, but local businesses feel that to widen the range of goods sold would damage the centre's “brand”. There are plans to use Ravencross Street to give the market more space - but not to increase the number of traders.

14.94 A current problem is that the school car park, which used to provide free parking for Sunday visitors, has closed. The Council could investigate providing some sort of short stay parking scheme to enable shoppers to park locally.

14.95 **Wapping** is a good quality neighbourhood centre which is functioning well and does not need any intervention except perhaps some improved signage.

14.96 **Cleveland Way/Cambridge Heath Road** is currently in two parts. The boundary should be amended to exclude the small parade of shops on Cleveland Way, to consolidate the centre.

14.97 **Whitehorse Lane** is a good quality neighbourhood centre but the Council should consider extending the boundary to include the area around Stepney Green underground station (and the nearby Anchor Retail Park, which may provide a development opportunity in the future). This larger centre could serve a wider population.

14.98 **Ben Jonson Road** is a model example of a neighbourhood centre, providing a range of local shops and services. Redevelopment is planned for the centre, possibly to include a new supermarket. This will improve the shopping environment, but the Council should seek to ensure that the centre’s existing character and function is maintained.

14.99 **Aberfeldy Street** should be allocated for redevelopment as a new and bigger centre to serve the new developments planned at Poplar Riverside. The street patterns and connections are in need of improvement.

14.100 **Stroudley Walk** provides a range of small shops and services for a local catchment and is part of an area which will be redeveloped by Poplar HARCA.

14.101 **Poplar High Street** is a good quality neighbourhood centre but the Council should consider extending the boundary to include the area around Blackwall Reach DLR, to create a larger centre to serve the new developments planned in this area. A Draft Development Framework has been produced for Blackwall Reach (2007) which proposes around 3,000 new homes, new businesses, community and education facilities, open space and improved transport, with a range of local shops and services to serve all this.
14.102 Manchester Road does not currently fulfil a neighbourhood centre function, but has the potential to do so if extended to include the retail provision at Island Gardens DLR.

14.103 Mile End currently has a large concentration of retail uses and could be designated as a new neighbourhood centre. A new market could possibly be developed in this area.

14.104 Thomas More the Council could consider designating Thomas More as a new neighbourhood centre. Connectivity would be key to its success as although there are existing retail uses, they are relatively inaccessible. The Council has commissioned a masterplan for the area that will look at how to increase connectivity (and link with Tower Hill and Tobacco Dock).

14.105 Devons Road could be designated as a new neighbourhood centre to provide a focus for retail in this area, which is currently under served.

14.106 Limehouse could also be designated as a new neighbourhood centre. It is more accessible than the existing shops at Salmon Lane, and there is potential in the area, recently recognised by Tesco who have opened a small supermarket. Public realm improvements would be needed.

14.107 Hackney Wick should also be considered as a new neighbourhood centre.

**Bromley by Bow**

14.108 Bromley by Bow should be designated as a new centre. The Tesco store is in need of redevelopment and expansion and the considerable housing growth planned for the area will support additional facilities. The key problem at Bromley by Bow is the busy A12 which severs the centre.

14.109 In order for Bromley by Bow to become a district centre, any proposal would need to deliver a remodeled streetscape including a high quality pedestrian road crossing, together with additional convenience and comparison shopping, a range of service outlets, and civic facilities. The Council could allocate Bromley by Bow as a district centre and state that any scheme would need to include all these elements in order to obtain planning permission.

14.110 If the Council’s opinion is that this type of development cannot be delivered, then it should be designated as a neighbourhood centre, with only modest new development permissible.

**Local Shops**

14.111 There are many local shopping parades across the Borough which we do not recommend for specific designations. These often serve a local convenience function for their communities, but equally the flexibility exists for them to be converted to other uses if appropriate.
Monitoring

14.112 To establish whether agreed targets for new floorspace (by type) are being provided, the Council should monitor:

14.113 Planning permissions (amount, type and location)

14.114 Completions (amount, type and location)

14.115 Changes of use should also be monitored. It is acknowledged that some changes of use are not ‘development’ and do not require express planning permission.

14.116 To establish whether new developments and environmental improvements are improving the health of the centres, the Council should also update key healthcheck indicators - such as retail rents - each year.

14.117 The recommendations set out in this report may need to be adjusted, in future, due to changing market conditions, demographic changes or the impact of developments elsewhere. They may also need to be adjusted if standard assumptions (such as those relating to expenditure growth) change.