6.3 Each site was inspected and its suitability for employment use assessed against the criteria listed below, which reflect those in the ODPM Guidance on Employment Land Reviews:

- strategic road access and local road access;
- accessibility to public transport and services;
- adjoining uses that might constrain employment uses;
- site size, characteristics and potential development constraints; and
- attractiveness to the market, including vacancy and market activity.

6.4 Other factors were also noted including the site’s suitability for specific uses, any barriers to the delivery of undeveloped sites for employment uses, as well as sustainability and sequential preference factors where relevant. Details of the criteria used to assess sites are in Appendix 14 and Appendix 15 contains a detailed assessment of each site against these criteria, along with commentary to supplement the formal appraisal exercise.

6.5 It should be noted, however, that this assessment process in itself does not necessarily provide a complete picture of a site’s role within the local economy. For example, a site’s importance to meeting particular business or sector needs can be important reasons for retaining a site even if it does not perform well against conventional site assessment criteria. A broader commentary is therefore provided on each site to supplement the formal scoring exercise.

6.6 Further to presenting an overview of the employment land considered in this assessment, a summary description is provided for each of the assessed sites, with a corresponding reference number.
Overview of Sites

6.7 As summarised in Table 6.1 below, in overall terms 591 hectares of employment land was assessed by this study. The sites are divided into three typologies taking account of the policy designations set out in the London Plan, Core Strategy and Site Specific Allocations:

1. **Strategic Industrial Locations (SILs)** are defined by the London Plan as a resource that must be sustained as London’s main reservoir of industrial capacity but nevertheless must itself be subject to periodic review to reconcile demand and supply. Three employment areas, River Road, Rippleside, and Dagenham Dock/Rainham are designated as SILs in the London Plan and identified as particularly suitable for general industrial, light industrial, storage and distribution, waste management, recycling, some transport related functions, utilities, wholesale markets and other industrial related activities;

2. **Locally Significant Industrial Sites (LSIs)**, in total there are eight LSISs; Hertford Road, Fresh Wharf (southern part), Gascoigne Business Area, Dagenham Ford, Sterling Industrial Estate/Wantz Road, Freshwater Road, Sanofi Aventis and A13 South; and,

3. **Undesignated Employment Sites**, additional sites that are not designated as specific employment sites were also assessed due to their concentration of employment uses. A number of these are designated as key regeneration areas.

6.8 The three SILs accounted for two thirds of the total site area assess (66%), while the eight LSISs and undesignated local employment sites accounted for 16% and 17.6% of the total site area respectively.

<table>
<thead>
<tr>
<th>Type of site</th>
<th>Number of sites</th>
<th>Total site area</th>
<th>% of total site area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Industrial Locations</td>
<td>15</td>
<td>392.7</td>
<td>66.4</td>
</tr>
<tr>
<td>Locally Significant Industrial Sites</td>
<td>14</td>
<td>95.1</td>
<td>16.0</td>
</tr>
<tr>
<td>Undesignated Employment Sites</td>
<td>11</td>
<td>104.1</td>
<td>17.6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>40</strong></td>
<td><strong>391.1</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Source: NLP Analysis  Note: site areas measured by NLP from LBBD GIS site boundaries

6.9 LBBD Council has prepared a Draft Barking and Dagenham Employment Areas Local Development Order (LDO). The purpose of the LDO is to extend the range of permitted development rights in the Borough’s designated employment areas to allow businesses to change use or make certain alterations without the need for planning permission for a three year period (2014-2017). The LDO relates to all employment areas designated on the LBBD’s Local Plan Proposals Map (February 2012) as Strategic Industrial Locations (SILs) or Locally Significant Industrial Sites (LSIs) excluding the Sanofi site and Dagenham Ford (Ford Stamping Plant).
Safeguarded Wharves

6.10 Wharves on the River Thames are awarded safeguarding by the Mayor of London via the London Plan Implementation Report: Safeguarded Wharves on the River Thames. The intention is to retain the remaining commercial wharves and to protect them from changes of use. Wharves are a valuable commercial asset that facilitate more sustainable, water based freight options for sectors including minerals and waste. Waterways based freight reduces dependency on road haulage. The status of these wharves is reviewed every five years. The latest review was carried out in 2013 which recommended the retention of twelve wharves within LBBD, it recommended the release of two wharves in view of surplus supply in north east London. LBBD has the highest number of safeguarded wharves in London and these form an important element of the Borough’s local economy. Fourteen wharves consisting of almost 120 hectares were also considered as part of this site assessment process; however the status of safeguarding is beyond the remit of the Council. It should be noted that each of these wharves is located within the boundary of the employment sites that were assessed.

Strategic Industrial Location Sites

Rippleside Employment Area

6.11 Rippleside Employment Area comprises of a number of individual employment sites. Rippleside is situated in a prime location between the town centres of Barking and Dagenham on land adjoining the A13 Ripple Road. While the A13 provides excellent connectivity to the wider strategic road network including the M25, it also isolates this employment area from the urban centres and local shops and services. The area is constrained by the A13 to the north and the rail line to the south. Local access tends to be via free moving roads that avoid residential areas but public transport provision is limited. The type and quality of the stock varies from site to site but the area is predominantly characterised by adequate quality, medium size warehousing and industrial units with B1, B2, B8 and some D1 and quasi-retail uses. Sites in the Rippleside Employment Area also meet the demand for low cost small scale employment space needs and thereby fulfil an important function. The majority of the sites have multiple occupiers. Vacancy levels of the better quality stock are low indicating that this area is attractive to the market. A large proportion of the employment area is included in the Council’s Site Specific Allocations DPD under specific site allocation: Freight Infrastructure at Renwick Road/ Ripple Road which earmarks the site for a strategic rail freight terminal and ancillary manufacturing logistics uses.

6.12 Rippleside - Site 22 [22] (7.43ha) This is the only site of the wider employment areas that is located to the north of the A13. There is a range of non-B class uses on this site with a mix of sui generis uses including petrol filling stations and motor vehicle showrooms. Access to the site is from the A123, Ripple Road which has a junction on to the A13 providing an
unconstrained access point. Internal site circulation routes are relatively poor and narrow, creating barriers of access. The adjacent land-uses include residential and Rippleside cemetery. Overall, this employment site performs well and adequately meets employment requirements albeit with a high proportion of non-B class uses however, it could benefit from improved circulation.

6.13 **Rippleside - Site 23** [23] (4.77ha) Alfred's Way Industrial Estate is a compact site that comprises of fully occupied, good quality warehousing and distribution units with some quasi-retail occupiers. This strategically located, good quality employment site adequately meets employment needs despite having poor local accessibility.

6.14 **Rippleside - Site 24** [24] (11.80ha) This is one of the larger sites in the employment area. It comprises a range of warehousing and distribution units and workshop type units and uses include B2, B8, D1 and sui generis. The lower quality units are currently vacant and appear to no longer fit the requirements of the market. Access points onto the A13 are currently inadequate due to poor visibility and difficult junctions and would require upgrading. The eastern part of the site falls within the specific site allocation: Freight Infrastructure at Renwick Road/ Ripple Road. In summary, this employment site is underperforming for its strategic and attractive location.

6.15 **Rippleside - Site 25** [25] (5.65ha) This single-occupier site hosts DB Schenker Rail Terminal and warehousing. It consists of a purpose built facility including a rail link to the main rail-line and modern, high quality warehouse units. Vehicle access onto the A13 is constrained due to poor visibility. This site is also a component part of the site specific allocation: Freight Infrastructure at Renwick Road/ Ripple Road. In summary, this bespoke site is a valuable, successful employment site in the Borough.

6.16 **Rippleside - Site 26** [26] (4.41ha) This site consists of large warehouse and industrial units, the quality of the units is relatively low quality, some of the units are derelict. Part of the site is in sui generis use as a karting facility and part of this site is undeveloped and in need of remediation works. This indicates that it is not currently meeting the needs of the market. There is dual access from a dedicated access road to the north of the site and from Renwick Road to the west. The dedicated access road provides the site with a relative advantage over other sites located along the A13 corridor which have constrained vehicle access. The site falls within a specific site allocation: Freight Infrastructure at Renwick Road/ Ripple Road. Overall, this is potentially a very attractive employment site however, redevelopment is required for its potential to be realised.

6.17 **Rippleside - Site 27** [27] (3.49ha) Rippleside Commercial Estate is a comparatively small site. Despite the low quality of the small scale workshop type units, it would appear that demand is strong as vacancy rates are low and new units are currently under construction on-site. Part of the site is undeveloped. The site benefits from a dedicated access road which it shares with the adjoining site. The site falls within a specific site allocation: Freight
Infrastructure at Renwick Road/ Ripple Road. To summarise, this reasonably successful employment site has an excellent strategic location but could benefit from redevelopment.

6.18 **Rippleside - Site 28** [28] (7.83ha) This site is currently well occupied by mixed light industrial, self-storage and distribution, D1 and sui generis uses. The quality of the units varies but there has been some recent investment. It adjoins a residential area to the east. It is comparatively disadvantaged in terms of local accessibility as vehicle access onto the A13 is constrained. Access improvements and some remediation works would be required as part of redevelopment. The site falls within a specific site allocation: Freight Infrastructure at Renwick Road/ Ripple Road. There is an existing permission for erection of two industrial units (11/00564/FUL). Overall, this site is relatively disadvantaged in terms of strategic access and compatibility of adjoining land-uses when compared with adjacent sites however, it remains to be a suitable employment site.

6.19 **Rippleside - Site 29** [29] (17.33ha) This site, the largest in the Rippleside employment area, comprises of large warehouse buildings. The site benefits from a HS1 freight link providing excellent trade linkages to mainland Europe. It currently has a single occupier; Shipco Transport Ltd. This is a remote site with a single access point from Renwick Road which links to the A13 however, it is fit for purpose. The site falls within a specific site allocation outside: Freight Infrastructure at Renwick Road/ Ripple Road. There is an existing planning permission for 19,400sqft of B8 commercial warehouse units (12/00159/FUL). Access improvements would be required as part of redevelopment to improve local access. To summarise, this is a successful and therefore attractive to the market employment site.

6.20 **Rippleside - Site 30** [30] (11.08ha) Situated off Morrison Road and Choats Manor Way, this site is separated from the rest of the Rippleside employment area by a residential development and Scratton’s Farm Eco-Park nature reserve. It comprises of high quality, large warehouse and distribution units. This site benefits from being located on a junction accessing both carriageways of the A13. Overall, this is a suitable employment site that is attractive to the market.

**River Road Employment Area**

6.21 The River Road employment area is designated as a SIL and thereby is safeguarded for employment uses. The area is situated to the South East of Barking Town Centre, and is bordered by residential land uses to the North. It forms the south western boundary of the LBBD and is bound by the River Roding to the west and the River Thames to the south. It is an expansive, multi-occupier area that accommodates a range of uses including; B1, B2, B8 and sui generis. The quality of the stock varies significantly from good quality warehousing and custom built facilities to dilapidated, vacant units. In terms of strategic access, the area benefits from its proximity to the A13 and access routes have been the focus of recent investment including East London
Transit. Local access routes in this vicinity are congested at peak times and there is a shortage of on-site parking. The area is served by a local bus service but is 1.5km from Barking and 2km from Upney underground stations and is thereby removed from the urban area and local shops and services.

6.22 River Road Employment Area - Site 35 [35] (57.40ha) This site is the largest of four sites that comprise the River Road employment area. It is dissected by River Road and incorporates Creekmouth Industrial Estate. There are nine wharves within the site boundary, of these, seven are active and safeguarded by the London Plan as part of the ‘Blue Ribbon Network’, in order to protect and promote waterborne freight transport. Despite the low quality of much of the stock, vacancy levels are low. Access improvements and remediation works would be required for the redevelopment of this site. The site is part of the Draft London Riverside Opportunity Area which recommends that uses on pockets of this site be intensified. Notwithstanding that this site scored relatively poorly against the site assessment criteria, it is an important site in the context of the local economy. In summary, this is active employment site but its potential is limited by the existing quality of some of the stock and issues associated with local accessibility.

6.23 River Road Employment Area - Site 36 [36] (12.91ha) This site comprises of a range of light industrial, warehousing, distribution and storage space. Creek Road runs through the centre of the site. Much of the space is average quality and there are a number of vacant units, however, there is an existing planning permission (10/00435/FUL) for 3 industrial units B1, B2, B8. Access improvements and remediation works would be required for the redevelopment of this site. In summary, this site is an adequate employment site that could improve its market attractiveness through partial redevelopment.

6.24 River Road Employment Area - Site 37 [37] (19.71ha) This linear, employment site spans Thames Road which connects River Road and Renwick Road. It includes good quality, larger warehouse and distribution space with high profile occupiers such as; TNT and UPS which are mainly located to the western end of the site. The units located to the east of the site are lower quality light industrial and office units. As well as B-class uses there are a number of D1, sui-generis and quasi retail uses. Occupancy levels are high. Adjoining land-uses include commercial and encroaching residential uses which may solidify accessibility uses. The Draft London Opportunity Area Planning Framework suggests the release of this land from employment uses. In summary, employment site which performs relatively well.

6.25 Kingsway Industrial Estate [20] (14.10ha) This employment site was re-designated from a LSIS to a SIL in the Specific Site Allocations DPD on the recommendation of the GLA. It comprises a mix of high quality storage and warehouse and distribution units cleared areas in need of remediation. Part of the site is being promoted as ‘Rose Business Park’, a new development of B1, B2, B8 units comprising of 45,000sqft. Internal circulation of the site is poor. It also adjoins some residential properties to the east and is constrained by the River Roding to the west and south of the site. Overall, the redeveloped parts
of this site are performing adequately but there is potential to enhanced performance of the entire site through the redevelopment of the brownfield parts of the site.

**Dagenham Dock**

6.26 **Dagenham Dock - Site 39** [39] (130.46ha) This is the largest single site that is designated in the Borough. It has been the focus of large scale infrastructure investment that will help to facilitate development. The former brownfield site is situated between the A13 and the River Thames to the south of Dagenham. It has been partially cleared and redeveloped. The site comprises of predominantly warehouse and distribution units with B1, B2 and B8 uses. Access to the strategic road network (A13) is just over 1 from the site and Choats Road dissects the site. Dagenham Dock train station is in close proximity to the site and it is served by East London Transit, despite this the site is removed from the urban area and local shops and services.

6.27 The site includes; London Sustainable Industries Park a focus of London’s Green Enterprise District that supports cleantech, environmental industries and technologies; Thames Gateway Park development which is partially complete and occupied and has outline planning consent for additional B1c, B2 or B8 units; an oil storage depot which is likely to be expanded in the future and Barking Reach Power station. The site benefits from a number of safeguarded onsite wharves which accommodate water based freight. Planning permission was also granted for an 18,296 sq.m. industrial building and stack to be used as a combined heat and power facility (10/00287/FUL). Of note, although the site is currently compatible with adjoining uses, the adjacent site has been earmarked for residential development as part of ‘Barking Riverside’. There is further scope for redevelopment onsite, however remediation works may be required and it is a component part of the GLA’s London Riverside Opportunity Area. To summarise, this is a suitable employment site that is currently the subject of comprehensive redevelopment.

6.28 **Dagenham Dock - Site 40** [40] (84.35ha) This site borders London Borough of Havering to the east and the River Thames provides a natural border to the south. It is a prominent, self-contained, single user site that is currently occupied by Ford for manufacturing uses. The northern part of the site is separated from the Ford manufacturing plant by Dagenham Breach and the A13 and is currently in use for open storage and distribution, it has a dedicated on-site rail link. The site also has a safeguarded wharf. Its location is remote from the town centre, local shops and services and public transport provision serving the site is limited to a local bus service. There is a single access route that links to the A13. Remediation works would be required as part of a redevelopment. In terms of planning factors, it is a component part of the GLA’s Draft London Riverside Opportunity Area Planning Framework which recommends partial intensification and redevelopment. Overall, this site is less well served in terms of local access, but has a dedicated on-site wharf and rail-link thereby improving its relative advantage.
Locally Significant Industrial Sites

Freshwater Road Employment Area

6.29 Freshwater Road LSIS comprises of six individual sites off Freshwater Road in Chadwell Heath. The area is located approximately 2km from the A12 which is accessed via the A1112. The area is less than 0.5km from Chadwell Heath train station providing good transport links. Chadwell Heath will also have a future Crossrail station which may create additional pressure from competing land uses in this predominantly residential area. The employment area is close to local services and labour market. The local roads in the vicinity experience high traffic flows and therefore are congested, access to the majority of the area runs through the residential area. There is also a shortage of car-parking provision resulting in on-street parking. Primary uses include B1c, B2 and B8 but there are some office, sui-generis and D1 uses evident. The quality and scale of the stock varies from large, modern distribution units to small scale workshop type units. Each of the sites have multiple occupiers and occupancy levels are low throughout. The area is bound by the railway to the north and there is emerging pressure in the vicinity for residential uses.

6.30 Freshwater Road - Site 2 [2] (10.41ha) This site spans both sides of Freshwater Road and comprises of modern industrial units, distribution warehousing, B1 office space (which is currently being refurbished) as well as quasi-retail and D1 uses. This is a well performing employment site but it is relatively disadvantaged in terms of proximity to the strategic road network and on account of its proximity to residential areas.

6.31 Freshwater Road - Site 3 [3] (3.55ha) This modern warehouse distribution centre development is located with two direct access points off Freshwater Road. Current occupiers comprise of a food distribution centre and quasi-retail uses. Part of the site available for redevelopment. Overall, this is a well suited for purpose employment site with potential for further development.

6.32 Freshwater Road - Site 4 [4] (5.31ha) This site is located between Selina’s Lane and the junction of the A1112. It comprises of a variety of buildings of varying quality and use types, predominantly small industrial units and older office buildings with multiple occupiers as well as D1 and quasi-retail uses. There are a number of vacant, dilapidated units in need of redevelopment. In summary, the potential of this employment site is limited by the low quality of existing stock.

6.33 Freshwater Road - Site 5 [5] (9.69ha) This site, located to the south of Selina’s Lane comprises of a wide variety of small, low grade workshop type units to the east, B8 warehousing units and some larger plots including; Dairy Crest dairy processing plant and Booker Cash and Carry to the west. The site is currently well occupied but may require remediation prior to any redevelopment in the future.

6.34 Freshwater Road - Site 6 [6] (2.22ha) Located off Kemp Road to the south of Freshwater Road LSIL, this site comprises of two storey office and workshop
type units, of varying quality. Currently, use classes include B1, B2, B8 and D1. It is relatively poorly located in terms of strategic road access as it is located almost 3km from the A12. Local accessibility is also poor with insufficient onsite parking, poor circulation routes and sole access through residential areas. Despite scoring poorly against conventional planning criteria, vacancy levels are low indicating that there is strong demand in the market for the types of units available on site and their relative affordability. In summary, this is low quality site with poor accessibility that performs well in market terms.

6.35 **Wantz Industrial Estate** [8] (9.71ha) This is a large, multiple occupier employment site, situated to the west of Rainham Road (A1112) and to the south of Oxlow Lane. It comprises of a range of B1, B2, B8 and D1 use types, units are predominantly good quality and vary in size, occupancy levels are low. It is located 4km from the strategic road network (A12/A13) and less than .5km from Dagenham East underground station. Its urban location results in accessibility to nearby services and a local labour supply. Overall, this is a well performing employment site, but it is relatively isolated from the strategic road network.

6.36 **Sterling Industrial Estate** [9] (6.70ha) This site adjoins Wantz Industrial Estate and is located on the A112 to the north east of Dagenham. It comprises of a range of building types including a number of good quality, large industrial units, a number of which units are currently vacant. There are also manufacturing, B1 and D2 uses on site. The site is 4km from the strategic road network (A12/A13) via the A1112 and just over .5km from Dagenham East station. Its urban location results in accessibility to nearby services and a local labour supply. Overall, this is a suitable employment site that is currently underutilised.

6.37 **Sanofi - Site 10** [10] (7.47ha) Located with access onto the A112, the former Sanofi site has been partially cleared and remediated and a strategic mixed use development, ‘Business East’ is currently under construction. This site forms part of the Business East Science and Technology (BEST) Park proposing 41,800sqm of quality, specialised business space including laboratory space, clean room manufacturing, office space and meeting and conferencing space. The site is adjacent to Dagenham East underground station. It adjoins residential land uses and designated green belt to the north. In summary, this legacy employment site provides unique employment use opportunities as part of wider regeneration.

6.38 **Hertford Road** [12] (8.65ha) This linear site is located to the north west of Barking Town Centre within the Barking Town Centre boundary. Existing uses include B1, B2, B8 and quasi-retail uses. The stock is good quality and is fully occupied with the exception of Bridge House offices. There are multiple occupiers including Wickies and Selco. It has dedicated access onto Hertford Road and London Road and is located on a junction of the strategic road network, the A406 North Circular Road. Circulation routes on-site are free moving and there is ample parking provision. The site is constrained by the A406 to the west and the River Roding to the west. In summary, this is a well
performing employment site that benefits from a very good strategic and central location.

6.39 **Fresh Wharf (Southern Part)** [16] (3.44ha) Muirhead Quay is an estate of modern, high quality industrial and warehouse type buildings, located between the A406 and the River Roding. Despite falling within the Barking Town Centre boundary, the development is isolated from town centre by the river. It has multiple occupiers and is almost fully occupied by B1, B2 and B8 type uses. The access is shared with Freshwater Wharf site with access onto the A406, internal circulation routes are free from congestion and there is an adequate supply of parking. While the land-use is compatible with adjoining sites, it is constrained by the River Roding and the A406. In summary, this modern development is a well performing, suitable employment site.

**Gascoigne Business Area**

6.40 Gascoigne Business Area includes two sites located off Gascoigne Road, 2.5km to the south of Barking Town Centre. This area falls within Barking Town Centre Boundary. Situated within the urban area, it is close to a local labour supply and is served by a local bus service, however the location is lacking in local services. These sites benefit from a strategic location adjacent to an unconstrained junction on to the A13. The sites are constrained by the River Roding to the west.

6.41 **Gascoigne Business Area - Site 1** [17] (3.31ha) The New England Industrial Estate consists of high quality, purpose built warehousing and distribution units. Market demand is buoyant and this site is fully occupied. The site adjoins a residential area to the north. Overall, this is a good quality employment site with a very good strategic location.

6.42 **Gascoigne Business Area - Site 2** [18] (3.22ha) Circular 13 Industrial Estate comprises of high quality office, warehouse and distribution units. It is currently occupied by multiple occupiers including two cash and carry companies. There is some warehouse vacancy and the office unit is currently in D1 use. There is good supply of on-site parking. Overall, this is an appropriate employment site that boasts an excellent strategic location however, it is currently under occupied and consequently experiencing losses to non-B class uses.

6.43 **Lyon Business Park** [21] (3.17ha) This site was designated as a LSIL in the Council’s Site Specific Allocation DPD 2010. This business park is situated to the east of River Road and 2.5km to the south east of Barking Town Centre. It offers a mix of modern, recently refurbished small scale industrial and workshop type units. However, units on the southern part of the site are a poorer quality. W. E. Deane occupy a large warehouse unit. A number of the units are currently vacant, while others are no longer fit for purpose due to their condition. It is strategically located within .2km of an access point onto the A13 however, it is removed from the town centre and local shops and services. It adjoins a residential area. The site is covered by a site specific allocation, Lyon Business Park which promotes employment uses however, housing and non-employment uses are permitted provided there is no net loss of employment.
space. In summary, this is a suitable employment site however, it is partially in need of redevelopment and is currently under-occupied.

6.44 Dagenham Ford [33] (18.25ha) This site, situated 1km south of Dagenham Town Centre consists of the former Ford Dagenham Stamping Operations manufacturing plant, warehouse units and associated offices. This is a large, self-contained, single occupier site located off New Road that is presently vacant. Access to the strategic road network (A13) is 1km from the site, further Dagenham Dock railway station is located to the south of the site. It is constrained by the railway to the south. The site would require remediation work prior to redevelopment but could be considered as part of the wider regeneration opportunities in the area (adjacent Beam Park). While this legacy site would provide an appropriate employment site on account of its compatibility with adjoining uses and proximity to local transport links, it performs relatively poorly in terms of strategic location.

Undesignated Employment Sites

6.45 Northgate Industrial Park [1] (1.61ha) This small scale industrial park is located to the north of Marks Gate. It is approximately 1.5km from the A12 and has good local access via free moving roads however, it is served by a limited number of bus routes and parking provision is limited. The remote, out of centre location means it is removed from local services. The site falls within the green belt and adjoins residential and recreational land-uses. It is currently fully occupied, with good quality units yet the circulation routes are poorly maintained. Overall, this site meets the employment requirements of this part of the Borough.

6.46 Freshwater Road - Site 7 [7](1.11ha) This site, to the south of Chadwell Heath adjoins the Freshwater Road LSIL. It comprises of good quality B8 units that are currently 100% vacant, older units have been recently cleared. It is located approximately 1.5km from the strategic road network (A12) and 1.5km from Chadwell Heath Station. It is also served by a number of bus routes. The site benefits from proximity to local services on Whalebone Lane (A1112) and labour from nearby residential areas. There are no obvious constraints on new development however, there are plans to redevelop the site for D1 uses. Overall, while this is a relatively good quality employment site that is suited to intensification and re-development and benefits from an urban location, it is unlikely to be available for employment uses.

6.47 Sanofi - Site 11 [11] (10.97ha) Located with access onto the A112 to the East of Dagenham town centre, this site is part of the former Sanofi site. It was formerly part of the Sanofi LSIS but was released as part of the Site Specific Allocation DPD 2010 however, it is still considered to be suitable for B class employment uses. It has been partially cleared and remediated and a strategic mixed use development, ‘Business East’ which includes B1, B2 and B8 uses is currently under construction and forms part of the Business East Science and Technology (BEST) Park proposing 41,800sqm of quality, specialised business space including laboratory space, clean room manufacturing, office space and
meeting and conferencing space. The site is adjacent to Dagenham East underground station. The adjoining sites include residential uses and designated green belt. In summary, this legacy employment site, provides unique employment use opportunities as part of wider regeneration.

6.48 Wakering Road [13] (1.12ha) This small site is located within Barking town centre, comprises of a number of large office buildings currently occupied by B1 and D1 uses. The site benefits from good strategic access and excellent local access; the A406 is less than 1.5km away and is linked to the site via the A124 therefore avoiding congested roads within the town centre. The site abuts the railway station which provides London Underground and Overground services. Located within a dense urban area, the site benefits from proximity to local services and labour, but is restricted in development by a lack of available land. A large proportion of the office space is currently unoccupied. In terms of planning factors, the subject site falls under the remit of both the Barking Station Master Plan and Barking Town Centre Area Action Plan Boundary which indicates capacity for 30,000sqm of office space at Barking Station. Overall, the town centre location and good access help make this a suitable site for employment, although the condition and market attractiveness of the current stock limits its current value. This site would be suitable for a mixed use development including employment land uses.

6.49 London Road [14] (1.80ha) This Barking town centre site, bound by London Road to the south and George’s Street to the North comprises of purpose built multi-storey office buildings and a multi-storey carpark. The office space is partially vacant and the quality of the stock varies from low grade to modern office space. It is located within a one-way system and approximately 1km from the North Circular Road (A406). Adjoining land uses include; commercial, residential and open space. Its central location provides a wide range of services nearby and a local labour force. The site falls within Barking Town Centre Area Action Plan Boundary and the Abbey and Barking Town Centre Conservation Area. Overall, the town centre location and good access help make this a suitable site for employment, although the condition and market attractiveness of the current stock limits its current value. This site would be suitable for a mixed use development including employment land uses.

6.50 Town Quay [15] (0.47ha) This small scale, good quality office building development is located within Barking town centre with access onto the A123 Abbey Road. Currently occupancy levels are low. It is situated within 1km from the North Circular Road (A406) and 1km from Barking station. The site adjoins commercial, residential and open space land uses, with the Icehouse Cultural Quarter creative hub also located on Abbey Road. There are limitations to development on this site as it is constrained by the River Roding to the west. The site falls within Barking Town Centre Area Action Plan Boundary. In summary, despite comprising of good quality office space this site is relatively distant from the town centre and does not appear to be currently attractive to the market.
6.51 **A13 - Gascoigne Rd / King Edward Road** [19] (1.87ha) This industrial site is located in a prime location with access directly on to the east bound carriageway of the A13, to the south of Barking town centre but within the Barking Town Centre Area Action Plan boundary. Despite excellent strategic access, local access is limited to bus services and it is removed from local services. The site is constrained by the A13 to the south and residential uses to the north. The proximity of residential land uses provides a good labour supply. The current building stock is very low quality, with a high vacancy rate and is in need of remediation prior to development. Overall, this is an underperforming employment site that suffers from limited overall market appeal attributed to its condition. This site will be partially redeveloped as part of the Gascoigne Estate regeneration and will include housing and employment land uses.

**South Dagenham**

6.52 South Dagenham is an area located approximately 1.5km from Dagenham Town Centre, between the railway line and the A1306 Ripple Road. As a result it is relatively removed from the town centre and local services. Dagenham Dock station provides excellent local and regional transport linkages. In contrast to other concentrations of employment land in the Borough, this area is characterised by large, single occupier sites. This area, including sites 31, 32 and 34 have been designated as key regeneration areas in the London Plan, which advocates its redevelopment as a mixed urban community. Sites 31 and 32 fall within a South Dagenham West and Chequers Corner key regeneration area while site 34 lies with South Dagenham East key regeneration area. In the interests of achieving a successful and viable development, the Council considers some employment generating uses at South Dagenham would be appropriate. However, as there is an objective to deliver housing at South Dagenham, the employment uses must not prejudice the development of housing. It is unclear what proportion of this area is intended for employment uses.

6.53 **South Dagenham (West) - Site 31** [31] (14.54ha) This large, self-contained, cleared, brownfield site is currently in use for open storage. Adjoining sites comprise of commercial and residential land uses. This site has outline planning consent for ‘Orion Park’, a B1, B2 and B8 scheme totalling 36,000-37,160sqm (387,500-400,000sqft), however the Council’s Site Specific Allocation DPD allocates it for housing development. In summary, this site is suited to employment uses on however, the low quality environment would require remediation works prior to redevelopment.

6.54 **South Dagenham (West) - Site 32** [32] (4.70ha) This is a small, prominent site fronting on to New Road (A1306), has been partially redeveloped for A4 and C1 use classes. It is an irregularly shaped site that adjoins a residential area to the north and the Ford Factory to the south. In summary, this is a constrained site with potential for a limited amount of employment uses.
South Dagenham (East) [34] (20.45ha) Beam park site is a large, self-contained, predominantly cleared, brownfield site, that is ready for redevelopment. This eastern side of the site forms the boundary between LBBD and London Borough of Havering. This site is subject to a site specific allocation: South Dagenham East which only permits temporary uses in the interim. To summarise, despite the suitability of this site for employment uses, it is relatively disadvantaged in terms of accessibility and proximity to the urban centre and is employment uses are constrained by current planning policy.

Barking Riverside Area [38] (45.46ha) This large brownfield site which has been cleared and remediated is a component part of the Barking Riverside development that has been marked for large scale housing development. It is located approximately 1.5km from the A13, despite being remote from Dagenham town centre, there is an increasing amount of residential land uses in the vicinity, bus linkages are good and includes East London Transit. The site adjoins the River Thames and flood prevention measures may need to be incorporated into new development. In terms of planning policy, it is designated as a key regeneration area and is subject to a site specific allocation: Barking Riverside. In conclusion, while this site is suited to employment uses, it is likely to be developed as mixed use, predominantly housing with some supplementary employment uses. However, this site could be suited to employment uses in the interim period.

Conclusion

Overall, the assessments of existing and allocated sites indicate that the Borough contains a reasonable range of employment sites of differing quality and type, totalling just over 591 ha. Almost 85% of sites have a specific policy status as SILs or LSIS. A number of other sites that are not designated as specific employment sites were also assessed due to their concentration of employment uses. Most of the sites accommodated a combination of both office (B1a/b) and industrial (B1c/B2/B8) uses, although some specific, single use sites were also evident.

Although a range of the sites comprise of low quality stock, vacancy levels are low indicating that rents are relatively affordable. This demonstrates that this type of space meets requirements of a particular part of the market and therefore fulfils an important function in employment space terms. The overall quality of existing employment sites appeared adequate to meet future needs with 83% of sites of at least average quality. The assessment process identified five high performing, good quality sites and two poor quality sites.

A summary of these site rankings is provided in Table 6.2. The broad categories of ‘good’, ‘average’ and ‘poor’ quality are intended to provide a broad indication of the overall quality of employment land supply rather than a comparison of one site against another.
### Table 6.2: Employment Site Assessment Summary Table

<table>
<thead>
<tr>
<th>Reference</th>
<th>Site Name</th>
<th>Site Status</th>
<th>Total Area (ha)</th>
<th>Total Uses</th>
<th>Rank</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Hertford Road</td>
<td>LSIS</td>
<td>8.65</td>
<td>B1, B2, B8</td>
<td>23</td>
<td>Good</td>
</tr>
<tr>
<td>16</td>
<td>Fresh Wharf (Southern Part)</td>
<td>LSIS</td>
<td>3.44</td>
<td>B1c, B2, B8</td>
<td>23</td>
<td>Good</td>
</tr>
<tr>
<td>23</td>
<td>Rippleside - Site 23</td>
<td>SIL</td>
<td>4.77</td>
<td>B1, B2, B8</td>
<td>23</td>
<td>Good</td>
</tr>
<tr>
<td>25</td>
<td>Rippleside - Site 25</td>
<td>SIL</td>
<td>5.65</td>
<td>B1c, B2, B8</td>
<td>23</td>
<td>Good</td>
</tr>
<tr>
<td>13</td>
<td>Wakering Road</td>
<td>Undesignated</td>
<td>1.12</td>
<td>B1</td>
<td>23</td>
<td>Good</td>
</tr>
<tr>
<td>24</td>
<td>Rippleside - Site 24</td>
<td>SIL</td>
<td>11.80</td>
<td>B1, B2, B8</td>
<td>22</td>
<td>Average</td>
</tr>
<tr>
<td>26</td>
<td>Rippleside - Site 26</td>
<td>SIL</td>
<td>4.41</td>
<td>B1, B2, B8</td>
<td>22</td>
<td>Average</td>
</tr>
<tr>
<td>27</td>
<td>Rippleside - Site 27</td>
<td>SIL</td>
<td>3.49</td>
<td>B1, B2, B8</td>
<td>22</td>
<td>Average</td>
</tr>
<tr>
<td>39</td>
<td>Dagenham Dock - Site 39</td>
<td>SIL</td>
<td>130.46</td>
<td>B1, B2, B8</td>
<td>22</td>
<td>Average</td>
</tr>
<tr>
<td>7</td>
<td>Freshwater Road - Site 7</td>
<td>Undesignated</td>
<td>1.11</td>
<td>B1c, B2, B8</td>
<td>22</td>
<td>Average</td>
</tr>
<tr>
<td>17</td>
<td>Gascoigne Business Area - Site 1</td>
<td>LSIS</td>
<td>3.31</td>
<td>B1c, B2, B9</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>18</td>
<td>Gascoigne Business Area - Site 2</td>
<td>LSIS</td>
<td>3.22</td>
<td>B1, B2, B8</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>22</td>
<td>Rippleside - Site 22</td>
<td>SIL</td>
<td>7.43</td>
<td>B1, B2, B8</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>30</td>
<td>Rippleside - Site 30</td>
<td>SIL</td>
<td>11.08</td>
<td>B1, B2, B8</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>14</td>
<td>London Road</td>
<td>Undesignated</td>
<td>1.80</td>
<td>B1</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>31</td>
<td>South Dagenham (West) · Site 31</td>
<td>Undesignated</td>
<td>14.54</td>
<td>B1, B2, B8</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>32</td>
<td>South Dagenham (West) · Site 32</td>
<td>Undesignated</td>
<td>4.70</td>
<td>B1</td>
<td>21</td>
<td>Average</td>
</tr>
<tr>
<td>3</td>
<td>Freshwater Road - Site 3</td>
<td>LSIS</td>
<td>3.55</td>
<td>B1c, B2, B8</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>24</td>
<td>Lyon Business Park</td>
<td>LSIS</td>
<td>3.17</td>
<td>B1, B2, B8</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>33</td>
<td>Dagenham Ford</td>
<td>LSIS</td>
<td>18.25</td>
<td>B1, B2, B8</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>36</td>
<td>River Road Employment Area - Site 36</td>
<td>SIL</td>
<td>12.91</td>
<td>B1c, B2, B8</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>15</td>
<td>Town Quay</td>
<td>Undesignated</td>
<td>0.47</td>
<td>B1</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>19</td>
<td>A13 - Gascoigne Rd / King Edward Road</td>
<td>Undesignated</td>
<td>1.87</td>
<td>B1, B2, B8</td>
<td>20</td>
<td>Good</td>
</tr>
<tr>
<td>4</td>
<td>Freshwater Road - Site 4</td>
<td>LSIS</td>
<td>5.31</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>5</td>
<td>Freshwater Road - Site 5</td>
<td>LSIS</td>
<td>9.69</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>8</td>
<td>Wantz Industrial Estate</td>
<td>LSIS</td>
<td>9.71</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>9</td>
<td>Stering Industrial Estate</td>
<td>LSIS</td>
<td>6.70</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>11</td>
<td>Sanofi - Site 11</td>
<td>Undesignated</td>
<td>10.97</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>29</td>
<td>Rippleside - Site 29</td>
<td>SIL</td>
<td>17.33</td>
<td>B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>40</td>
<td>Dagenham Dock - Site 40</td>
<td>SIL</td>
<td>84.35</td>
<td>B1, B2, B8</td>
<td>19</td>
<td>Average</td>
</tr>
<tr>
<td>10</td>
<td>Sanofi - Site 10</td>
<td>LSIS</td>
<td>7.47</td>
<td>B1, B2, B8</td>
<td>18</td>
<td>Average</td>
</tr>
<tr>
<td>20</td>
<td>Kingsway Industrial Estate</td>
<td>SIL</td>
<td>14.10</td>
<td>B1, B2, B8</td>
<td>18</td>
<td>Average</td>
</tr>
<tr>
<td>28</td>
<td>Rippleside - Site 28</td>
<td>SIL</td>
<td>7.83</td>
<td>B1, B2, B8</td>
<td>18</td>
<td>Average</td>
</tr>
<tr>
<td>37</td>
<td>River Road Employment Area - Site 37</td>
<td>SIL</td>
<td>19.71</td>
<td>B1, B2, B8</td>
<td>18</td>
<td>Average</td>
</tr>
<tr>
<td>34</td>
<td>South Dagenham (East)</td>
<td>Undesignated</td>
<td>20.45</td>
<td>B1, B2, B8</td>
<td>18</td>
<td>Average</td>
</tr>
<tr>
<td>2</td>
<td>Freshwater Road - Site 2</td>
<td>LSIS</td>
<td>10.41</td>
<td>B1, B2, B8</td>
<td>16</td>
<td>Good</td>
</tr>
<tr>
<td>35</td>
<td>River Road Employment Area - Site 35</td>
<td>SIL</td>
<td>57.40</td>
<td>B1, B2, B8</td>
<td>16</td>
<td>Good</td>
</tr>
<tr>
<td>38</td>
<td>Barking Riverside Area</td>
<td>Undesignated</td>
<td>45.46</td>
<td>B1, B2, B8</td>
<td>16</td>
<td>Good</td>
</tr>
<tr>
<td>1</td>
<td>Northgate Industrial Park</td>
<td>Undesignated</td>
<td>1.61</td>
<td>B1c, B2, B8</td>
<td>14</td>
<td>Poor</td>
</tr>
<tr>
<td>6</td>
<td>Freshwater Road - Site 6</td>
<td>LSIS</td>
<td>2.22</td>
<td>B1, B2, B8</td>
<td>14</td>
<td>Poor</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>591.90</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: NLP analysis
7.0 Future Requirements for B Class Employment Space

7.1 This section considers future economic growth needs in Barking & Dagenham drawing on a number of scenarios for the Borough. These scenarios are used to inform the analysis of the potential economic growth drivers within the Borough and the employment land, regeneration and planning policy implications that flow from these. It then compares these future scenarios with estimates of available employment land to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

Approach

7.2 The NPPF requires local authorities to, "set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth" (para 21). In evidence base terms, this should be underpinned by, “a clear understanding of business needs within the economic markets operating in and across their area” (para 160).

7.3 In this context, a number of potential future economic scenarios have been developed through this study to provide a framework for considering future economic growth needs and B Class employment space requirements in Barking & Dagenham over the period to 2032. These scenarios draw on:

a projections of employment growth in the main B class sectors (labour demand) derived from economic forecasts produced by Experian and the GLA;

b consideration of past trends in completions of employment space based on monitoring data supplied by LBBD, and how these might change in the future;

c estimating future growth of local labour supply based on demographic projections adopted by the retail analysis undertaken as part of this study and the amount of jobs and employment space that this can support.

7.4 All these approaches have some limitations and careful thought needs to be given as to how appropriate each is to circumstances in Barking & Dagenham. In addition, to be robust, the economic growth potential and likely demand for employment space in Barking & Dagenham needs to be assessed under different future scenarios, to reflect lower or higher economic growth conditions arising in future.

7.5 It should also be noted that the assessment is not purely quantitative, and that there may be qualitative factors that influence the future employment space requirements that need to be planned for.
**a. Forecasts of Job Growth**

Forecasts of job growth for Barking & Dagenham for the period up to 2031 were obtained from Experian (December 2013 quarterly release) and extrapolated to 2032 on a pro-rata basis. It should be emphasised that such forecasts tend to be most reliable at national and regional scales and consequently less so at the local economy level, but they are widely recognised as a valuable input and can indicate the broad scale and direction of economic growth in different sectors to help assess future employment space requirements.

**Scenario 1: Baseline Job Growth**

The forecasts of job growth by sector used here reflect recent trends and are based on projections at regional (London) level, and how economic sectors in Barking & Dagenham have fared relative to the region’s growth in the past. These forecasts also reflect the current post-recession economic climate, and should be viewed in the context of the significant uncertainty surrounding future economic growth.

7.8 This indicates overall growth of 10,640 jobs forecast for the Borough over the 19 year period (Table 7.2), equivalent to 560 jobs per year. Table 7.1 presents the fastest growing sectors under this scenario alongside those sectors expected to see a decline in employment while Figure 7.1 compares past and future job growth in Barking & Dagenham by sector in order to understand the pattern of change within key sectors of the Borough’s economy. A full breakdown of baseline job growth by sector (including non B class sectors) is presented in Appendix 17.

<table>
<thead>
<tr>
<th>Sector</th>
<th>% Change 2013-2032</th>
<th>Additional Jobs 2013-2032</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport</td>
<td>69.6</td>
<td>3,000</td>
</tr>
<tr>
<td>Real Estate</td>
<td>64.1</td>
<td>580</td>
</tr>
<tr>
<td>Professional Services</td>
<td>35.5</td>
<td>490</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>34.6</td>
<td>640</td>
</tr>
<tr>
<td>Admin &amp; Support Services</td>
<td>32.8</td>
<td>1,950</td>
</tr>
<tr>
<td>Financial Services</td>
<td>31.8</td>
<td>320</td>
</tr>
<tr>
<td>Social Care</td>
<td>30.6</td>
<td>990</td>
</tr>
<tr>
<td>Computing &amp; Information Services</td>
<td>29.8</td>
<td>290</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-14.5</td>
<td>-850</td>
</tr>
<tr>
<td>Public Admin &amp; Defence</td>
<td>-20.7</td>
<td>-520</td>
</tr>
</tbody>
</table>

Source: Experian/NLP analysis, 2013 - total jobs including self-employed

Key: B Class; Part B Class; Non B Class

7.9 As shown above in Table 7.1 and below in Figure 7.1, the transport, business services and hospitality sectors are expected to drive the majority of employment growth in the Borough over the next 19 years. Growth in the
transport, professional services, hospitality, financial services sectors is forecast to occur at a higher rate than these sectors have recorded over the last 16 years (1997 to 2013), although job growth in the real estate, admin & support, social care and IT sectors is expected to slow compared with past trends.

Figure 7.1 Employment Growth in Barking & Dagenham (1997 to 2013 and 2013 to 2032) (Baseline)

7.10 The retail sector is expected to see continued employment growth of 670 jobs by 2032 or 15%, while job growth within the recreation sector is anticipated to slow compared to recent trends, recording an additional 1,140 jobs by 2032.

7.11 In overall terms, the baseline scenario implies a significantly higher level of job growth over the 19 year period 2013 to 2032 (10,640 workforce jobs in total or 560 per annum) than the Borough has achieved in the past. Experian data shows that total workforce jobs actually decreased over the period 1997 to 2013, by around 1,150 (or 72 per annum), although as noted earlier, this decline was driven by significant job losses associated with a small number of larger firms based in the Borough, rather than reflecting a broad trend of employment decline within Barking & Dagenham’s local economy. Nevertheless, the baseline job growth scenario points to a significant acceleration of the economy in employment terms.

7.12 The overall employment change in Barking & Dagenham resulting from these Experian forecasts is shown in Table 7.2 along with expected job growth in the main B class sectors. This includes an allowance for jobs in other non B class sectors that typically use industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and
some public administration activities (see Appendix 16). A detailed breakdown of the baseline Experian forecast by sector is included at Appendix 17.

Table 7.2  Forecast Employment Change in Barking & Dagenham 2013-2032

<table>
<thead>
<tr>
<th></th>
<th>No of Jobs</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2013</td>
<td>2032</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)*</td>
<td>8,450</td>
<td>7,950</td>
</tr>
<tr>
<td>Distribution (B8)**</td>
<td>7,660</td>
<td>9,160</td>
</tr>
<tr>
<td>Offices (B1a/b)***</td>
<td>5,720</td>
<td>7,700</td>
</tr>
<tr>
<td>Total B-class Jobs</td>
<td>21,830</td>
<td>24,810</td>
</tr>
<tr>
<td>Jobs in All Sectors</td>
<td>55,180</td>
<td>65,820</td>
</tr>
</tbody>
</table>

Source: Experian / NLP analysis, 2013 - total jobs including self-employed  Note: totals rounded

* includes vehicle repair and some construction activities  ** includes parts of transport & communications sectors that use industrial land  *** includes publishing and a proportion of government offices

These indicate relatively moderate overall net job gains (2,980 jobs) in the B-use classes in Barking & Dagenham over the period to 2032, with strong growth in office and distribution based activities offset by a slight decline in manufacturing jobs. This is within the context of overall job growth of 10,640 jobs predicted for the Borough over the period, which outside the B Class sectors will mainly be in the transport, education and social care sectors.

These job forecasts can then be converted to future employment space requirements assuming typical ratios of jobs to floorspace for the different B uses. To estimate space needs, the following average ratios have been applied:

- **Offices:** 1 job per 13.8sqm
- **Industry:** 1 job per 43sqm
- **Warehousing:** 1 job per 65sqm is assumed for general, smaller scale warehousing (accounting for approximately 50% of Barking & Dagenham's warehousing stock) and 1 job per 74sqm for large scale, lower density units

These assumptions are based on the latest HCA/Offpat guidance on employment densities published in 2010. This guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot-desking. This has resulted in a decrease in the amount of floorspace per office worker that is assumed compared to earlier guidance. The industry employment density (1 job per 43sqm) is similar to the outer London density adopted by analysis for the Land for Industry and Transport SPG. The warehousing density differs from the Industry and transport SPG methodology (which applies a density of 1 job per 44sqm for B8 workers) to

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23 This reflects the employment density used to inform the base case for demand forecasts in the LOPR 12 and differs slightly from the HCA/Offpat benchmark of 12.5sqm per worker
24 Based on HCA/Offpat Employment Densities Guide, 2010
25 The GLA Industrial Land Demand and Release Benchmarks in London Technical Report uses an employment density per B2 worker of 44sqm
reflect the low density nature of the Borough’s distribution and warehousing activities.

7.16 An allowance of 10% is added to all positive floorspace requirements to reflect a normal level of market vacancy in employment space. Where a reduction in jobs is forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

Table 7.3 Experian Job Growth based Employment Space Requirements in Barking & Dagenham, 2013-2032

<table>
<thead>
<tr>
<th>Floorspace (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing (B1c/B2)</td>
</tr>
<tr>
<td>Distribution (B8)</td>
</tr>
<tr>
<td>Offices (B1a/b)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

7.17 This forecast net increase of 2,980 B Class jobs over a 19-year period (to 2032) which underpins this estimate of future employment space needs, is equivalent to an average of 157 additional B Class jobs respectively each year. This is significantly higher than the job growth achieved in Barking & Dagenham over the period 1997-2013 when Experian data indicates that B class jobs in the Borough decreased by approximately 440 jobs per annum. On the basis of past performance, the above employment space forecasts could be regarded as a more optimistic estimate.

**Scenario 2: GLA Job Based Estimate**

7.18 An alternative, job based estimate of future needs has been compiled using GLA forecasts of office jobs growth in Barking & Dagenham contained in the London Office Policy Review 2012 (LOPR) and of industrial job change set out in the GLA London Employment Time Series paper which provide Borough level employment forecasts to 2031. These industrial job forecasts are constrained by land supply and other factors. As shown in Table 7.4, these forecasts point to a loss of 2,850 industrial jobs over the period 2013-2032, and an increase of 1,250 office based jobs.

Table 7.4 Forecast Employment Change in Barking & Dagenham 2013-2032

<table>
<thead>
<tr>
<th>No of Jobs</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>2032</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>15,900</td>
</tr>
<tr>
<td>Offices (B1a/b)</td>
<td>5,560</td>
</tr>
<tr>
<td><strong>Total B Class</strong></td>
<td><strong>21,460</strong></td>
</tr>
</tbody>
</table>


---

26 GLA London Employment Time Series, Technical Report, March 2010, Roger Tym & Partners – the employment projections set out in the report are used to inform GLA Industrial Land Demand and Release Benchmarks. Although updated GLA employment projections were released in 2013, the associated breakdown by office and industrial is not yet available.

27 The forecasts have been extrapolated to 2032 based on average annual growth over the 20 year period 2011-2031.
These employment forecasts were then converted to floorspace requirements in a similar way to Scenario 1 above (including a 10% vacancy allowance), and by applying Experian proportions of B1c/B2 and B8 jobs to industrial employment in 2013 and 2032. The GLA forecasts are less optimistic in terms of office job growth in the Borough and more pessimistic in terms of industrial employment, indicating an overall loss of industrial jobs over the period compared with a slight gain implied by Experian data.

This job growth approach implies a loss of around 84 B class jobs per annum over the study period (2013-2032). This could be considered to form a scenario that reflects slower economic recovery generally and no major slowing in the decline of manufacturing jobs in the Borough. This estimate produces a large net reduction in B class space overall (-118,350sqm) and only a moderate requirement for office space (18,980sqm), approximately two thirds of the amount indicated by the Experian job based estimate.

Table 7.5  GLA Job Growth based Net Employment Space Requirements in Barking & Dagenham, 2013-2032

<table>
<thead>
<tr>
<th>B Class Sector</th>
<th>Job Change 2013-2032</th>
<th>Net Floorspace Requirement (Sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>-2,850</td>
<td>-137,330</td>
</tr>
<tr>
<td>Offices (B1a/b)</td>
<td>1,250</td>
<td>18,980</td>
</tr>
<tr>
<td>Total B-class</td>
<td>-1,600</td>
<td>-118,350</td>
</tr>
</tbody>
</table>

Source: NLP analysis  Note: totals rounded

It should be noted that the employment projections adopted by both the 2012 LOPR and 2010 GLA London Employment Time Series paper are now a number of years old and reflect a recession based economic outlook which has subsequently been upwardly revised as the UK enters recovery.

b. Past Development Rates

Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a reasonable basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, the future demand picture may not reflect past trends and some adjustments may be needed.

Scenario 3: Past Development Rates

Data on past completions by B class sector was provided by LBBD. Completions in the period 2003-2013 have been analysed, since this is a reasonably long period that reflects a full business cycle with periods of both economic growth and recession. Over this period, average annual net completions for B Class uses amounted to some 12,450sqm, broken down as
shown in Table 7.6. The vast majority (86%) of net completions were for industrial space, with the remaining 14% for offices. Gross completions were significantly higher, at an average of 30,960 sq.m annually, but this masks some losses of employment space in development schemes.

<table>
<thead>
<tr>
<th>Sector (Use Class)</th>
<th>Net annual completion (sq.m)</th>
<th>Gross annual completion (sq.m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>10,690</td>
<td>28,745</td>
</tr>
<tr>
<td>Office space (B1a/b)</td>
<td>1,760</td>
<td>2,215</td>
</tr>
<tr>
<td>All</td>
<td>12,450</td>
<td>30,960</td>
</tr>
</tbody>
</table>

Source: LBBD Monitoring Data (2003-2013)

7.24 One view of future growth in Barking & Dagenham could simply assume that future development rates carry on at the long term average achieved in the past. If it were assumed that the past net completion rates noted above continued in the 19 years between 2013-2032, it would equate to a need for 33,440sqm of office space, and 203,110sqm of industrial space. In total, this would indicate demand for approximately 236,550sqm of employment space by 2032, a figure significantly higher than that estimated using job forecasts scenario (Table 7.3).

<table>
<thead>
<tr>
<th>Sector (Use Class)</th>
<th>Assumed annual completion rate (sqm)</th>
<th>Floorspace Required (sqm)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>10,690</td>
<td>203,110</td>
</tr>
<tr>
<td>Office space (B1a/b)</td>
<td>1,760</td>
<td>33,440</td>
</tr>
<tr>
<td>All</td>
<td>12,450</td>
<td>236,550</td>
</tr>
</tbody>
</table>

Source: NLP analysis * totals rounded

7.25 This approach assumes that past trends of industrial development in both a relatively buoyant as well as recessionary economic period would continue unchanged, but may not fully reflect the impacts of the current economic downturn that could reduce future demand for industrial space. Conversely, it may underestimate future demand if the supply was constrained in the past, for example because of delays in sites coming forward, poor sites available or infrastructure/funding factors.

c. Future Labour Supply

7.26 It is also important to consider how many jobs, and hence how much employment space, would be needed to broadly match forecast growth of the Borough’s resident workforce. In contrast to the two preceding approaches, this forecasts the supply of labour rather than labour demand. It then indicates
the amount of new jobs needed to take-up this future supply of workers and minimise local unemployment, and how much employment space would be needed to accommodate these jobs.

**Scenario 4: Labour Supply (population projections equivalent to 2,907 people p.a.)**

7.27 The Barking & Dagenham Economic Development Study uses population estimates to calculate the need for additional retail floorspace across the Borough to 2032. It uses latest GLA Demographic Projections for the Borough which estimates that Barking & Dagenham’s population will increase from 195,858 in 2013 to 251,100 by 2032, equivalent to population growth of 2,907 per annum.

7.28 The labour supply implications of this scenario have also been modelled by NLP to take account of economic activity rates and future pension age changes outlined in current national policy. This provides an approximation of the number of people likely to be seeking work within Barking & Dagenham as it allows for a proportion of the resident population commuting to jobs elsewhere.

7.29 The workplace labour supply forecasts indicate an increase of 9,512 workers in the Borough by 2032 (Table 7.8). From these forecasts, the number of B Class jobs required was estimated assuming one additional job would be required for each additional worker forecast and based on the forecast proportion of B Class jobs within total jobs in Barking & Dagenham in 2032.28

<table>
<thead>
<tr>
<th></th>
<th>Average per year (2013-2032)</th>
<th>Change 2013-2032</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>2,907</td>
<td>55,242</td>
</tr>
<tr>
<td>Resident labour supply</td>
<td>1,353</td>
<td>25,707</td>
</tr>
<tr>
<td>Workplace labour supply</td>
<td>501</td>
<td>9,512</td>
</tr>
<tr>
<td>B-class job requirement</td>
<td>186</td>
<td>3,530</td>
</tr>
</tbody>
</table>

Source: LBBD / NLP analysis  * totals rounded

7.30 The resulting job numbers were then translated into estimated requirements for B class employment floorspace by applying the same standard employment densities used in the job growth based approach and adding a 10% vacancy allowance. The floorspace estimates for manufacturing and warehousing space were combined since these two sectors typically occupy the same types of sites at similar development densities.

7.31 Overall, future employment space requirements based on meeting the job needs of local residents would mean approximately 169,810sqm B class employment space being required by 2032 (Table 7.9).

---

28 Source: Experian baseline employment forecasts, 2013
Table 7.9  B Class Floorspace Required from Labour Supply Growth

<table>
<thead>
<tr>
<th>Use</th>
<th>Floorspace (sqm) 2013-2032</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>153,180</td>
</tr>
<tr>
<td>Offices (B1a/b)</td>
<td>16,630</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>169,810</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

7.32 This labour supply based estimate provides a useful benchmark for comparison with labour demand approaches. Based on projected population increase of 2,907 p.a., this forecast produces a floorspace requirement that sits between the job growth and past take-up scenarios.

7.33 One potential drawback of this approach is that no change is assumed over time in the proportion of future jobs made up by office-based employment, which might be expected to increase in future (given recent trends in the Borough – Figure 2.3). This might underestimate future office space requirements and overestimate industrial space needs.

**Net Employment Space Requirements**

7.34 Drawing together the results from these different approaches and growth scenarios, Table 7.10 summarises the net floorspace requirement up to 2032 arising from each.

Table 7.10  Net Floorspace Requirement to 2032 for Different Growth Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Labour Demand / Job Growth</th>
<th>Past Development Rates</th>
<th>Labour Supply (2,907 pop p.a.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Experian Baseline</td>
<td>2. GLA Projection</td>
<td>3. Past Take-up</td>
</tr>
<tr>
<td>Offices (B1a/b)</td>
<td>30,010</td>
<td>18,980</td>
<td>33,440</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>104,460</td>
<td>-137,330</td>
<td>203,110</td>
</tr>
<tr>
<td><strong>All B uses</strong></td>
<td><strong>134,470</strong></td>
<td><strong>-118,350</strong></td>
<td><strong>236,550</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

7.35 These forecasts reflect a fairly wide range of potential space requirements. For industrial space, this would be between -137,330sqm (based on GLA job growth) and 203,110sqm (past take-up) up to 2032. For office space, the range is narrower, between 16,630sqm (based on labour supply) and 33,440sqm (based on past take-up).

**Safety Margin**

7.36 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is
normal to add an allowance as a safety margin for factors such as delays in
some sites coming forward for development.

7.37 In a location like Barking & Dagenham with a relatively constrained land supply
and development pressure from other uses, there is a need to ensure a
reasonable but not over-generous additional allowance that provides for some
flexibility but avoids over-provision of scarce land. However, it also needs to
reflect that there may be potential delays in some of the Borough’s
development sites coming forward for development.

7.38 The SEEPB guidance on employment land assessments recommends an
allowance that is equivalent to the average time for a site to gain planning
permission and be developed, typically about two years. For Barking &
Dagenham, the margins set out in Table 7.11 were added for B Class use
based on three years of average net take-up which appears an appropriate
level relative to the estimated scale of the original requirement and taking
account of the nature of the land supply in the Borough.

Table 7.11  Safety Margin Allowances

<table>
<thead>
<tr>
<th>Use</th>
<th>Average Annual Take-up (sqm)</th>
<th>Safety Margin Added (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>1,760</td>
<td>3,520</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>10,690</td>
<td>21,380</td>
</tr>
</tbody>
</table>

Source: NLP analysis

Convert to Gross Floorspace Requirements

7.39 To convert the net requirement of employment space into a gross requirement
(the amount of employment space or land to be allocated/planned for), an
allowance is also typically made for some replacement of losses of existing
employment space that may be developed for other, non B Class uses.

7.40 Judgements were made on the suitability and degree of the allowance for
future losses which it would be appropriate to apply here based on analysis of
supply-side deliverability factors and current trends in the market. Not all
losses need to be replaced as some will reflect restructuring in the local
economy as less manufacturing space is needed in future. In the past, loss of
employment space in Barking & Dagenham has largely been driven by falling
demand for and consolidation of, industrial (particularly B2) uses, while
manufacturing employment is forecast to decline in the Borough over the next
19 years (Table 7.2). Nonetheless, market demand for industrial space in
Barking & Dagenham has continued to remain strong, reflecting the Borough’s
strong strategic connections and industrial heritage.

7.41 Therefore, it is considered inappropriate for the Borough to replace all losses of
industrial space going forward and it has been assumed that 50% of industrial
losses will be replaced each year, equating to 9,030sqm. For offices, an
allowance of 225sqm p.a. was applied, based on 50% of the average annual
loss of office space over the last 10 years\textsuperscript{29}. A similar proportion of office losses have been replaced given that historically loss of office space has largely involved loss of older, redundant office space, for example within Barking town centre.

The resultant gross floorspace requirements incorporating these allowances are set out in Table 7.12 and Figure 7.2.

Table 7.12  Gross Floorspace Requirement by Scenario to 2032 (sq.m)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>37,800</td>
<td>26,780</td>
<td>41,240</td>
<td>24,430</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>285,020</td>
<td>34,240</td>
<td>395,990</td>
<td>346,110</td>
</tr>
<tr>
<td>All B uses</td>
<td>322,820</td>
<td>61,020</td>
<td>437,230</td>
<td>370,540</td>
</tr>
</tbody>
</table>

Source: NLP analysis * totals rounded

Figure 7.1  Gross Floorspace Requirements by Scenario (sq.m)

Estimate Land Requirement

The final step, for all scenarios, was to translate floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions and local adjustment factors to reflect the pattern of development in the Borough:

\textsuperscript{29} Based on 2003-2013 LBBD monitoring data
• **Industrial** – a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate 4,000sqm of employment floorspace; and

• **Offices** – it was assumed that 20% of new floorspace would be in lower density, business park developments with a plot ratio of 0.4, with 80% in higher density town centre locations at a plot ratio of 2.0.

7.44 The resulting land requirements are set out in Table 7.13 and Figure 7.3.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>3.4</td>
<td>2.4</td>
<td>3.7</td>
<td>2.2</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>71.3</td>
<td>8.6</td>
<td>99.0</td>
<td>86.6</td>
</tr>
<tr>
<td>All B uses</td>
<td>74.7</td>
<td>11.0</td>
<td>102.7</td>
<td>88.8</td>
</tr>
</tbody>
</table>

Source: NLP analysis

7.45 The range of land requirements for office development land is very narrow – between 2.2 and 3.7 ha to 2032, depending on the approach used. For industrial land, the range is significantly wider, between 8.6 and 99.0 ha to 2032.

Figure 7.2 Gross Land Requirement by Scenario (ha)

Source: NLP analysis

### Sensitivity Tests

7.46 Given the range of potential requirements implied by these different estimates of future requirements, it is important to test how reasonable each appears against other factors and how sensitive they are to different assumptions.
It is useful to first compare the employment growth implied by these amounts of land with employment growth actually achieved in Barking & Dagenham in recent years (Figure 7.4). The lowest estimate based on GLA job growth projections implies a loss of 84 B class jobs per annum over the next 19 years, driven by declining industrial jobs. The highest growth estimate based on past take-up implies some 377 more B class jobs annually, just over half (55%) of which relate to industrial jobs. These figures compare with an average loss of 440 B class jobs in Barking & Dagenham per year between 1997 and 2013, and an average annual loss of 210 B class jobs (between 1997 and 2013) if the significant job losses associated with Ford and Sanofi Aventis in the Borough are excluded from past trends. None of the scenarios lie particularly close to this past trend of employment decline, although the GLA job growth scenario follows the same downward trajectory.

This indicates that all four scenarios could generate a higher level of job creation than has been achieved in the Borough in the recent past. As that period was one of relatively strong economic growth, followed by a severe recession with an outlook of fragile recovery, these estimates would appear optimistic.

It is important to note however that historic job growth trends in Barking & Dagenham are likely to have experienced downward pressure as a result of significant job losses associated with a small number of large employers within the Borough (notably Ford and Sanofi). It is arguably unlikely that job losses would occur on the same scale in future, as the Borough’s business base diversifies (and no longer has the same degree of reliance on a small number of large employers). Caution should therefore be taken when making
comparisons between the scenarios outlined above and past job growth trends.

Other assumptions which can make a significant difference to the forecasts of future requirements include the allowance for replacement of future losses. With no allowance for future losses, the lowest estimate of future industrial space needs (GLA job growth scenario) would result in a negative requirement of -137,330sqm. Removing the allowance for future office losses would reduce the lowest requirement (labour supply) by 17% to 20,155sqm.

Demand/Supply Balance

This section draws together the forecasts of future employment land needs outlined above and the estimates of land available on the area’s existing and allocated employment sites in Section 6.0 to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

Quantitative Balance

The previous section identified a need for between 61,020sq.m and 437,230sq.m of employment space up to 2032, including a modest safety margin largely to allow for delays in sites coming forward for development. The land requirements associated with these amounts of employment floorspace were estimated at between 11.0ha and 102.7ha.

Pipeline Supply

As detailed in Section 3.0, the pipeline supply of employment space in the Borough comprises outstanding planning permissions for B class space and undeveloped or cleared sites as identified by the site assessment exercise undertaken as part of this study.

From these sources, the land available to help meet future needs in Barking & Dagenham is estimated to comprise approximately 146ha in net terms as shown in Table 7.14. The majority of this identified supply (89%) comprises undeveloped/cleared sites, with the remaining 11% representing extant planning permissions.

Table 7.14  Available Employment Floorspace in Barking & Dagenham

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>B1 (Offices and light industrial)</td>
<td>5.3</td>
</tr>
<tr>
<td>B2/B8 (Industrial)</td>
<td>12.3</td>
</tr>
<tr>
<td>B1-B8 Mixed</td>
<td>128.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>146.0</strong></td>
</tr>
</tbody>
</table>

Source: Barking & Dagenham Monitoring Data (March 2013) and NLP analysis

The majority (88%) relates to sites that have been assessed by NLP as being suitable for mixed B1-B8 uses, although in reality these would appear most suitable to accommodate industrial (B1c/B2/B8) uses. Less than 4% of this
identified supply relates to B1 uses (as defined by LBBD monitoring data), although this B class category is likely to include B1c light industrial uses as well as purely office (B1a/b) uses.

7.56 Although this pipeline supply is distributed across Barking & Dagenham, the majority of sites are concentrated along the A13 corridor to the south of the Borough, and is dominated by a small number of large sites including the Barking Riverside Area, Dagenham Dock and Beam Park.

7.57 A broad comparison of estimated demand for B Class space against all currently identified supply, as shown in Table 7.15, implies that Barking & Dagenham would have sufficient employment space in quantitative terms up to 2032 to meet the needs arising from all four scenarios of future requirements. The potential surplus of space would vary from 43.3ha under the past take-up scenario to 135ha of employment space under the GLA job growth scenario.

Table 7.15 Demand/Supply of B Class Employment Space in Barking & Dagenham (to 2032)

<table>
<thead>
<tr>
<th>Requirement for B Class Space (ha)</th>
<th>1. Experian Baseline</th>
<th>2. GLA Projections</th>
<th>3. Past Take-up</th>
<th>4. Labour Supply (2,907 pop p.a.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Employment Space (ha)</td>
<td></td>
<td>146.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surplus (+)/Shortfall (-) (ha)</td>
<td>+71.3</td>
<td>+135.0</td>
<td>+43.3</td>
<td>+57.2</td>
</tr>
</tbody>
</table>

7.58 Ensuring an adequate choice of types of sites is also important to meet the needs of different employment sectors and the aims for diversity of employment opportunities at different skill levels. Potential supply of employment space for both industrial and office uses was therefore compared with estimated requirements for these uses.

7.59 Table 7.16 and Figure 7.5 compare the demand and supply situations for industrial and offices uses separately. This indicates that there should be more than enough supply available, in purely quantitative terms, to meet both industrial and office needs arising under all four demand estimates. For industrial space, the surplus ranges from 41.6ha (past take-up) to 132ha (GLA job growth) which broadly accords with the GLA’s Land for Industry and Transport SPG which sets an indicative annual release benchmark of 1.8 ha of industrial land per annum for the Borough over the period 2011-2031. For office space the range is narrower, between 1.6ha (past take-up) and 3.1ha (labour supply).

7.60 This predicted surplus assumes that all undeveloped/cleared employment sites and outstanding planning permissions (at March 2013) come forward in full for employment development over the plan period. Any deviation from this assumption could potentially reduce the existing surplus of employment space. It is also worth noting that the demand/supply balance of employment space is
very sensitive to the inclusion of two large sites at Barking Riverside and Dagenham Dock (which together account for nearly two thirds of the total 146ha supply figure). Excluding these two sites from the identified supply position would have a significant impact upon the demand/supply balance for the Borough, and would result in a shortfall of employment space under three of the four scenarios by 2032.

Table 7.16 Demand/Supply for office and industrial space to 2032 (ha)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Industrial</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial space requirement</td>
<td>71.3</td>
<td>8.6</td>
<td>99.0</td>
<td>86.6</td>
</tr>
<tr>
<td>Potential supply of industrial space</td>
<td></td>
<td></td>
<td></td>
<td>140.6</td>
</tr>
<tr>
<td>Surplus(+) / Shortfall(-)</td>
<td>+69.3</td>
<td>+132.0</td>
<td>+41.6</td>
<td>+54.0</td>
</tr>
<tr>
<td><strong>Offices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office space requirement</td>
<td>3.4</td>
<td>2.4</td>
<td>3.7</td>
<td>2.2</td>
</tr>
<tr>
<td>Potential supply of office space</td>
<td></td>
<td></td>
<td></td>
<td>5.3</td>
</tr>
<tr>
<td>Surplus(+) / Shortfall(-)</td>
<td>+1.9</td>
<td>+2.9</td>
<td>+1.6</td>
<td>+3.1</td>
</tr>
</tbody>
</table>

Note: Assumes that B1-B8 Mixed space is available for industrial uses and that B1 space is available for office uses

Figure 7.4 Forecast surplus of office and industrial space to 2032 by scenario

Source: NLP analysis

On paper, this suggests that the identified pipeline supply as it stands provides for sufficient industrial and office space to meet the Borough’s employment
development needs to 2032 in purely quantitative terms. However, there are factors which mean this issue requires further consideration, set out below.

**Alternative Supply Position**

7.62 The 146ha of employment land outlined above comprises a combination of outstanding planning permissions and undeveloped or cleared sites that have been identified (and assessed within the context of employment uses) as part of the site assessment process undertaken through this study. Some of these undeveloped or cleared sites are not designated or allocated for specific employment use, but are instead designated as ‘Key Regeneration Areas outside Barking Town Centre (CM2)’ in the Local Development Framework Proposals Map (Adopted February 2012) having been identified to help deliver the Managing Growth theme of the Core Strategy which covers policies CM1 – CM5 as set out in the Site Specific Allocations Development Plan Document (Adopted December 2010). These sites include:

1. Barking Riverside Area
2. Beam Park (South Dagenham East)
3. South Dagenham (West)

7.63 The Site Specific Allocations Development Plan Document refers to the potential for some employment generating uses on these sites although residential development represents the main intended use, alongside a range of other mixed uses. They therefore have no current policy status or protection as employment sites, and subsequently no guarantee that B class employment development will come forward on these sites over the plan period.

7.64 As a sensitivity test, these three sites have been excluded from the future supply position, to reflect the ‘worst case’ scenario of employment land capacity within the Borough. Taken together, the effect of removing these sites would be a reduction of 84.6ha or 58% of the total employment land capacity previously identified by this study. This would reduce the supply of available industrial space by 58% to 58.9ha and the available supply of office space by 53% to 2.5ha.

7.65 Table 7.17 below summarises the effect of these changes in terms of presenting an alternative supply position.

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding Planning Permissions</td>
<td></td>
</tr>
<tr>
<td>B1 (Offices and light industrial)</td>
<td>2.5</td>
</tr>
<tr>
<td>B2/B8 (Industrial)</td>
<td>10.8</td>
</tr>
<tr>
<td>B1-B8 Mixed</td>
<td>N/A</td>
</tr>
<tr>
<td>Undeveloped/Cleared Sites (as identified through site assessments)</td>
<td></td>
</tr>
<tr>
<td>B1 (Offices and light industrial)</td>
<td>N/A</td>
</tr>
<tr>
<td>B2/B8 (Industrial)</td>
<td>1.5</td>
</tr>
<tr>
<td>B1-B8 Mixed</td>
<td>46.6</td>
</tr>
</tbody>
</table>
For the purposes of this study, it is useful to test the various employment land requirements to 2032 against this alternative supply position. In this situation, Barking & Dagenham would not have enough employment space in quantitative terms to accommodate three of the four scenarios of future employment space requirements, with this potential shortfall varying between 13.3ha and 41.3ha (Table 7.18).

Table 7.18  Demand/Supply of B Class Employment Space to 2032 (ha) (Alternative Supply)

<table>
<thead>
<tr>
<th>Requirement for B Class Space (ha)</th>
<th>1. Experian Baseline</th>
<th>2. GLA Projections</th>
<th>3. Past Take-up</th>
<th>4. Labour Supply (2,907 pop p.a.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>74.7</td>
<td>11.0</td>
<td>102.7</td>
<td>88.8</td>
</tr>
<tr>
<td>Available Employment Space (ha)</td>
<td></td>
<td></td>
<td>61.4</td>
<td></td>
</tr>
<tr>
<td>Surplus (+)/Shortfall (-) (ha)</td>
<td>-13.3</td>
<td>+50.4</td>
<td>-41.3</td>
<td>-27.4</td>
</tr>
</tbody>
</table>

Source: NLP analysis

7.67 A comparison of the demand and supply situations for industrial and office uses under the ‘worst case’ supply position indicates that there would be a shortfall of industrial space to meet forecasted needs across three of the four scenarios, while two scenarios (based on Experian job growth and past take-up) would result in an overall shortfall of office space by 2032 (Table 7.19).

Table 7.19  Demand/Supply for office and industrial space to 2032 (ha) (Alternative Supply)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial space requirement</td>
<td>71.3</td>
<td>8.6</td>
<td>99.0</td>
<td>86.6</td>
</tr>
<tr>
<td>Potential supply of industrial space</td>
<td></td>
<td></td>
<td>58.9</td>
<td></td>
</tr>
<tr>
<td>Surplus(+)/Shortfall(-)</td>
<td>-12.4</td>
<td>+50.3</td>
<td>-40.1</td>
<td>-27.7</td>
</tr>
<tr>
<td>Offices</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office space requirement</td>
<td>3.4</td>
<td>2.4</td>
<td>3.7</td>
<td>2.2</td>
</tr>
<tr>
<td>Potential supply of office space</td>
<td></td>
<td></td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>Surplus(+)/Shortfall(-)</td>
<td>-0.9</td>
<td>+0.1</td>
<td>-1.2</td>
<td>+0.3</td>
</tr>
</tbody>
</table>
Note: Assumes that B1-B8 Mixed space is available for industrial uses and that B1 space is available for office uses

Figure 7.5  Forecast surplus of office and industrial space to 2032 by scenario (Alternative Supply)

It should be noted that this alternative, ‘worst case’ supply position could change as and when the future role of these Key Regeneration Area sites becomes clearer and discussions have taken place with relevant land owners and developers to define a clear land use policy basis for the release and development of those sites. Although the above analysis indicates that this alternative supply position results in a shortfall of employment land under three of the four scenarios to 2032, this deficit could be reduced if some employment development comes forward on any of these Key Regeneration Area sites.

It will therefore be important for the Council, working with partners, to carefully consider the role that these sites should play in meeting future B class requirements in Barking & Dagenham, to ensure that business needs can be met in full within the Borough. The quantitative analysis suggests that these sites would need to deliver between 12ha and 40ha of industrial land to fully meet the demand for this type of space over the period to 2032.

Qualitative Factors

Even where no quantitative shortfall of space is identified, in some circumstances additional land may be needed for qualitative reasons, for example to:

- improve the choice of provision for occupiers;
- meet gaps in the supply of particular types of premises;
- improve or modernise the quality of current provision and so help attract more occupiers; or
• provide a better spatial distribution of employment sites to meet the needs of different settlements.

7.71 Qualitative needs are considered for each broad property type/area individually.

**Industrial**

7.72 Barking & Dagenham is perceived as a good industrial location, with both demand for, and take-up of, industrial space having picked up in recent months. However, supply has tightened in recent years as new development has been limited, with industrial vacancy reported to be amongst the lowest in the wider East London market area. The main gap in supply is good quality ('Grade A'), modern industrial premises particularly of a larger scale and for readily deliverable sites to meet immediate requirements.

7.73 There is an increasing risk that requirements for industrial space are unable to be met within Barking & Dagenham, which could result in both existing and potential industrial occupiers being displaced outside of the Borough. There could potentially be scope to diversify the type of industrial activity accommodated in the Borough, and make more efficient use of its existing space (for example through gradual upgrading) to accommodate growth of indigenous firms, attract new occupiers and enable the churn and re-configuration of existing sites to better meet the needs/demands of firms.

**Offices**

7.74 By contrast, Barking & Dagenham is not a particularly strong office location, with limited levels of demand, a lack of the necessary critical mass to attract and sustain larger office occupiers and strong competition from larger established and growing office centres nearby. Negligible amounts of new office development over the last 40 years reflects the wider decline of the suburban office market, resulting in a remaining stock of generally poor quality office space, characterised by a number of larger buildings that are functionally obsolete and largely redundant to modern business needs.

7.75 From a demand perspective, the severity of the recession, alongside relatively low rental values and the secondary nature of Barking & Dagenham as an office location (particularly compared with other larger and growing centres nearby) have resulted in very little interest from developers or investors to develop new space or refurbish existing stock. Local agents are doubtful that there would ever be sufficient demand in the short to medium term from office based firms to justify any significant additional allocations of land for employment use. Instead, the future health of the Borough’s office market will rely upon providing small scale, good quality and flexible space to meet the needs of local SMEs.
Conclusions

7.76 Four different scenarios of future employment space requirements have been considered, based on a number of approaches which reflect economic growth, past development trends and potential housing supply factors. The majority of these reflect assumptions of higher future economic growth in Barking & Dagenham than the Borough has achieved in the recent past.\footnote{Recognising that past trend of employment decline was driven by significant job losses associated with a very small number of larger firms based in the Borough, rather than reflecting a broad trend of employment decline within Barking & Dagenham’s local economy.}

7.77 The overall space requirements related to these different scenarios range from 61,020sq.m to 437,230sq.m of all types of employment space to 2032, implying in broad terms a need for between 11.0ha and 102.7ha of employment land. The majority of this spatial requirement relates to industrial (B1c/B2/B8) uses, with office uses generating a negligible requirement, equivalent to less than 0.5ha per annum even under the highest scenario (past take-up).

7.78 Given an uncertain economic outlook, it is difficult to select the most likely option from these alternative growth pictures although within the context of the NPPF requirement to plan positively for growth, the Council should consider planning to accommodate at least the Experian baseline job growth requirement to ensure that that the Borough’s economy is not constrained by lack of spatial capacity in future.

7.79 Based on available employment space identified by Council monitoring data, at a superficial level, Barking & Dagenham has sufficient employment floorspace in quantitative terms to meet future needs up to 2032 under all scenarios of future growth, with a relatively significant surplus arising under all four approaches.

7.80 However, the calculations underpinning this conclusion assume that a number of Key Regeneration Area sites including Barking Riverside, Beam Park and South Dagenham (West) within the Borough come forward for purely B class employment uses over the plan period, despite having no current status or protection for employment uses. Excluding these sites from the portfolio of future supply would be significant enough to result in a shortfall of employment space under three of the four growth scenarios. It will therefore be important for the Council, working with partners, to carefully consider the role that these sites should play in meeting future B class requirements in Barking & Dagenham, to ensure that business needs can be met in full within the Borough.

7.81 From a more qualitative perspective, the Borough is reported to lack the availability of readily deliverable industrial sites and good quality, modern industrial premises to satisfy occupier requirements. Although on paper there seems to be a significant amount of industrial land available within Barking & Dagenham, this space does not appear to be reflected by market feedback with local agents reporting a progressive tightening of the industrial market in
recent months and years. This misalignment potentially points to inherent deliverability factors preventing the Borough’s sites coming forward for industrial development, which the Council (working with partners) should seek to overcome to ensure that occupier requirements can continue to be satisfied within the Borough boundary.

With regards to offices, the combination of a lack of demand and viability factors is likely to inhibit new development of any significant scale coming forward in the short to medium term in the Borough. Nevertheless, the existing office stock is of a generally poor quality and is unlikely to be suitable to meet the majority of needs arising over the plan period, particularly from professional services firms which are expected to account for the majority of office based job growth over the period to 2032. Although some of this older, functionally obsolete space may gradually erode away over time (including potentially through the recently introduced PD rights), there will be a need to replace this space with newer, good quality flexible stock that specifically caters for the local SME market.
8.0 Future Requirements for Retail and Town Centre Uses

8.1 This section assesses the quantitative and qualitative scope for new retail floorspace in LBBD in the period from 2013 to 2032. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 10.

8.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in LBBD. The study area is sub-divided into six zones as shown in Figure 8.1. The zones have been defined using ward boundaries. The survey zones take into consideration the extent of the catchment areas of Barking, Dagenham Heathway, Chadwell Heath and Green Lane. There will, however, be leakage from the study area to centres outside, and conversely inflow from surrounding areas.

Figure 8.1: LBBD Study Area

8.3 The methodology is summarised in Figure 8.2 and set out in more detail in Appendix 8.
Figure 8.2: Methodology for Estimating Future Requirements for Retail Floorspace

Stage 1: Taking Stock of the Existing Situation
- Population
- Local Expenditure Estimates
- Assess Retail Space / Turnover
- Existing Shopping Patterns from Surveys

Stage 2: Creating a Picture of Future Requirements
- Assess Balance between Expenditure and Expected Turnover
- Population and Expenditure Projections
- Estimate Quantitative and Qualitative Need
- Identify Surplus Expenditure Capacity

Stage 3: Accommodating Growth
- Consider Ability of Vacant Hoorspace to Meet Need
- Consider Allocated Development Sites
- Identify Other Potential Development Sites
- Conclusions and Recommendations
- Final Report
- Local Plan Preparation

Implications of Commitments and Developments
Population and Expenditure

8.4 The study area population for 2011 and projections to 2032 is set out in Table 1 in Appendix 18. Population data has been obtained from the GLA 2012 Round of Demographic Projections SHLAA-based ward projections. Population within the study area is expected to increase between 2013 and 2032 by 23% (94,594 people).

8.5 As set out in section 2, LBBD has a relatively young population (children and young adults) and lower proportions of middle and old aged people. This age structure is reflected within Experian’s local expenditure estimates adopted in this study. This age structure is expected to change in the future with growing proportions of both middle aged and old aged people. This trend is expected across London and nationally.

8.6 Table 2 in Appendix 18 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2032. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 19.

8.7 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 36% from £629.10 million in 2013 to £856.81 million in 2032, as shown in Table 3 (Appendix 18).

8.8 Comparison goods spending is forecast to increase by 98% between 2013 and 2032, increasing from £851.25 million in 2013 to £1,688.62 million in 2032, as shown in Table 3 (Appendix 19).

8.9 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income whereas spending on non-food goods does.

8.10 These figures relate to real growth and exclude inflation

Existing Retail Floorspace, 2013

8.11 Existing convenience goods retail sales floorspace within LBBD is 31,375 sq.m net, as set out in Table 11 in Appendix 18. This floorspace figure excludes comparison sales floorspace within food stores (3,477 sq.m net).

8.12 Comparison goods retail floorspace within LBBD is estimated as 37,642 sq.m net, as shown in Table 11 in Appendix 19, of which 35% is located in Barking town centre.

Existing Spending Patterns, 2013

8.13 The results of the household shopper questionnaire survey undertaken by NEMS in October 2013 have been used to estimate existing shopping patterns
within the study area shown in Figure 8.1 above. A summary of the methodology and results is shown in Appendix 9.

**Convenience Shopping**

8.14 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 18.

8.15 Table 4 indicates the proportion of residents within the three zones within LBBD each zone that carry out their convenience retail shopping within LBBD ranges from 77.4% in Zone 1 (Barking) to 65.9% in Zone 3 (Green Lane/Chadwell Heath). For the zones outside the Borough boundary, the proportion of residents that undertake convenience goods stopping within LBBD is much lower, ranging from 36.6% in Zone 5 (Redbridge South) down to 12.7% in Zone 4 (Havering West). In general household will tend to use food and grocery shopping facilities that are close to home. The shopping patterns suggested by the household survey results are consistent with this trend.

8.16 The level of convenience goods expenditure attracted to shops/stores in LBBD in 2013 is estimated to be £307.72 million as shown in Table 5, Appendix 18. This includes estimates of inflow from beyond the study area, applying the market shares, identified in Table 4. The market share of total convenience expenditure generated within the study area that is retained by shops/stores in LBBD (i.e. excluding any inflow to these shops/stores from beyond the study area) is estimated to be about 46% (£292.33 million out of £629.10 million available expenditure in the study area).

8.17 For the zones within LBBD (Zones 1-3), the market share of convenience expenditure that is retained by shops/stores in LBBD (i.e. excluding any inflow to these shops/stores from beyond LBBD) is estimated to be about 73% (£218.79 million out of £298.69 million available expenditure in LBBD). Consequently, 27% of available convenience expenditure in LBBD is leaking to facilities outside LBBD (about £80 million). This leakage is primarily to food stores in the Beckton area (from the western part of LBBD) and to food stores in Romford (from the east part of LBBD).

8.18 The total benchmark turnover of the existing convenience sales floorspace within LBBD is £259.62 million (Table 11, Appendix 18). These figures suggest that collectively convenience retail facilities in LBBD are trading about 18% above average, with a surplus of available convenience expenditure of £48.1 million.

**Comparison Shopping**

8.19 The estimated comparison goods expenditure currently attracted by shopping facilities within LBBD is £150.69 million in 2013, as shown in Table 5, Appendix 19. This includes estimates of inflow from beyond the study area. The market share of total comparison goods expenditure generated within the study area that is retained by centres/facilities in LBBD (i.e. excluding any inflow to these
shops/stores from beyond the study area) is 16% (£136.99 million out of £851.25 million available expenditure in the study area).

8.20 For the zones within LBBBD (Zones 1-3), the market share of comparison expenditure that is retained by shops/stores in LBBBD (i.e. excluding any inflow to these shops/stores from beyond LBBBD) is estimated to be about 26% (£102.13 million out of £391.63 million available expenditure in LBBBD). Consequently, 74% of available comparison expenditure in LBBBD is leaking to facilities outside LBBBD (about £290 million). Based on NLP’s recent experience of other outer London Borough this level of comparison goods retention (26%) is relatively low. Comparable figures in recent studies range from 35% to 55%, i.e. Harrow (35%), Haringey (38%), Waltham Forest (40%), Merton (45%) and Enfield (55%).

8.21 The lower retention levels compared with the convenience goods market shares reflects the influence of higher order centres outside LBBBD, in particular Romford, intu Lakeside, Beckton, Ilford, Westfield Stratford and Central London.

8.22 Based on this expenditure estimate, the overall average sales density for existing comparison sales floorspace (37,642 sq.m net) is £4,003 per sq.m net. The analysis of existing comparison shopping patterns in 2013 suggests the following average sales density figures for the centres in LBBBD shown in Table 8.1. It should be noted that the net floorspace figures exclude comparison retail floorspace within local shops in neighbourhood parades.

Table 8.1: Comparison Average Sales Densities

<table>
<thead>
<tr>
<th>Centre</th>
<th>Average Sales Density 2013 (£ per sq.m net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking (incl. Abbey Retail Park/Wickes)</td>
<td>£2,883</td>
</tr>
<tr>
<td>Dagenham (incl. Merrielands Retail Park)</td>
<td>£6,055</td>
</tr>
<tr>
<td>Chadwell Heath/Green Lane</td>
<td>£4,316</td>
</tr>
<tr>
<td><strong>LBBBD Average</strong></td>
<td><strong>£4,003</strong></td>
</tr>
</tbody>
</table>

8.23 The higher average sales density for Dagenham is partly due to the presence of a number of national multiple retailers within Dagenham Heathway, and the comparison floorspace in the Asda store at Merrielands Retail Park. Lower trading densities generally reflect the predominance of independent traders and larger retail warehouse units selling bulky goods. The lower average sales density for Barking is primarily due to the presence of retail warehouse units such as Wickes and Dreams clearance store, which have a much lower turnover density than high street shops.

8.24 There is no evidence to suggest existing comparison sales floorspace is over-trading in the Borough, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions, particularly in Dagenham.
Capacity for Convenience Goods Floorspace

8.25 It is appropriate and realistic to plan to maintain the Borough's market shares over the study period. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace. Food store commitments in LBBD will change shopping patterns in the future and could increase expenditure retention in the Borough. However, it should be noted that if the commitments do not come forward, this would release expenditure capacity.

8.26 Information has been provided by LBBD on major retail commitments and proposals within the Borough. The Asda at Whalebone Lane (ref. 11/00901/FUL) opened in October 2013 and this store would not have achieved full or settled trading patterns at the time the household survey was undertaken. It has therefore been included as a commitment. This store has a net sales area of 2,713 sq.m, of which 1,628 sq.m is convenience goods floorspace. The convenience goods turnover of the store in 2017 is estimated to be £21.03 million based on the company average sales density. The store’s comparison goods turnover is estimated to be £8.95 million in 2017.

8.27 Planning permission was granted for a mixed use development at London Road/North Street, Barking on 23 March 2012 (ref. 11/00954/FUL). This scheme is under construction and includes a new Asda store that will replace the existing store at Vicarage Field, plus six retail unit shops. The new supermarket will have a net sales area of 3,716 sq.m, of which 2,230 sq.m is convenience goods floorspace. The convenience goods turnover of the store is estimated to be £28.81 million in 2017 based on the company average sales density. The store’s comparison goods turnover is estimated to be £12.26 million in 2017. This store is replacing the existing Asda, the actual uplift of convenience goods turnover is estimated to be £4.67 million.

8.28 Outline planning permission for the mixed use redevelopment of the Sanofi Aventis site was approved on 29 March 2012 (ref. 11/01044/OUT). In addition to a range of commercial and employment uses, the scheme proposes a supermarket, which is intended to be operated by Sainsbury’s. The proposed store will have a net sales area of 6,958 sq.m, of which 5,219 sq.m is convenience goods floorspace. The convenience goods turnover of the store is estimated to be £68.44 million in 2017 based on the company average sales density for Sainsbury’s. The store’s comparison goods turnover is estimated to be £9.90 million.

8.29 Planning permission to extend the existing Morrison’s store at Becontree Heath was granted on 26 November 2013 (ref. 13/00628/FUL). The extension to the store allows the internal reconfiguration of the store to create an additional 1,433 sq.m net sales area, of which 75% is assumed to be convenience goods floor...
floorspace, with an expected turnover of £13.18 million in 2017. The comparison goods element would have an expected turnover of £3.64 million.

8.30 The Barking Riverside development is expected to include new district and neighbourhood centres. The development has planning permission for up to 19,700 sq.m gross of Class A1 to A5 floorspace. This will include one large retail unit of between 2,500 to 8,000 sq.m to be occupied by a food store. The precise content of the new centres is unclear, but for this study it is assumed that 60% of the overall floorspace (11,820 sq.m) will be occupied by Class A1 retail. This floorspace will have a sales area of around 8,800 sq.m net. A split of 45% convenience goods sales and 55% comparison sales has been adopted. The convenience goods turnover is estimated to be £47.52 million.

8.31 Based on the expected turnover of commitments and likely trade draw from the study area zones, informed by existing shopping patterns from the household survey, predicted future shopping patterns have been re-assessed based on NLP’s judgement. Taking these commitments into account, future adjusted market shares are shown in Table 6 in Appendix 18.

8.32 The future level of available convenience goods expenditure at 2017, 2022, 2027 and 2032 is shown at Tables 7, 8, 9 and 10 in Appendix 18.

8.33 The total level of convenience goods expenditure available for shops in the Borough between 2013 and 2032 is summarised in Table 12 (Appendix 18). Convenience expenditure available to shopping facilities in the Borough is expected to increase from £307.72 million in 2013 to £471.77 million in 2032.

8.34 Table 12 subtracts the benchmark turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the Borough, there is a surplus of £48.10 million convenience goods expenditure in 2013. This surplus becomes a deficit of -£46.04 million in 2017 due to the implementation of commitments. Continued future growth reduces this deficit to -£9.19 million in 2022. Growth produces a surplus of £24.97 million in 2027, increasing to £57.30 million in 2032.

8.35 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 13, Appendix 18, and summarised in Table 8.2 below. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.

8.36 The capacity figures are over and above commitments with planning permission as at December 2013, excluding the new proposed district centre at Barking Riverside, which has outline planning permission. The figures suggest commitments are sufficient to meet growth up to and beyond 2017. The additional floorspace comprising the new Asda at Whalebone Lane and the Morrison’s extension result in an over-supply of floorspace in the Chadwell Heath/Green Lane area. This over-supply is counter-balanced by retail expenditure capacity in the Barking area.
8.37 The surplus of available expenditure up to 2022 indicates that there is a medium term requirement for additional convenience goods floorspace in the Barking area of 1,678 sq.m net (2,398 sq.m gross), increasing to 2,630 sq.m net by 2027.

8.38 There is limited potential elsewhere in the Borough up to 2027 due to the implementation of commitments.

### Capacity for Comparison Goods Floorspace

8.39 The household survey suggests that the Borough’s retention of comparison goods expenditure is significantly lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Romford, intu Lakeside, Beckton, Ilford, Westfield Stratford and Central London.

8.40 Future improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the Borough to increase their market share of expenditure. Retail development will be necessary in LBBD in order to maintain existing market share in the future. An appropriate strategy for LBBD should be to seek to maintain existing 2013 market shares for the existing centres in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

8.41 It is realistic and appropriate to plan to maintain market shares. The centres within LBBD should be capable of maintaining their existing comparison market share despite retail development in nearby centres, such as planned improvements in intu Lakeside. LBBD’s centres should plan to maintain their existing role, which is complementary to the higher order centres.

8.42 In addition to the comparison retail floorspace within the food store developments identified above, there is an extant planning permission for a
mixed use development at Vicarage Field in Barking town centre, which includes 1,000 sq.m net additional retail floorspace (ref. 09/00476/FUL). This could comprise comparison goods floorspace and would have an expected turnover of £5.41 million in 2017. The unit shops within the London Road/North Street proposals (ref. 11/00954/FUL) could comprise comparison goods floorspace. These units have a total net floorspace of 320 sq.m and an expected turnover of £1.73 million in 2017.

The Barking Riverside development could include 11,820 sq.m gross occupied by Class A1 retail. This floorspace will have a sales area of around 8,800 sq.m net. A split of 45% convenience goods sales and 55% comparison sales has been adopted. The expected comparison goods turnover is estimated to be £24.2 million.

Taking these commitments into account, future adjusted market shares are shown in Table 6 in Appendix 19. Available comparison goods expenditure has been projected forward to 2017, 2022, 2027 and 2032 based on the adjusted penetration rates in Tables 7, 8, 9 and 10 in Appendix 19, and summarised in Table 12. Comparison expenditure available to facilities within the Borough is expected to increase from £150.69 million in 2013 to £335.85 million in 2031.

Future available expenditure is compared with the projected turnover of existing comparison retail is shown in Table 12 (Appendix 19). Table 12 assumes that the benchmark turnover of comparison floorspace will increase in real terms. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers’ ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

Within LBBD, by 2017 there will be an expenditure deficit of -£38.78 million, if commitments are implemented. This deficit reduces to -£22.08 million in 2022. By 2032, future expenditure growth generates an expenditure surplus of £27.39 million.

Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 13 in Appendix 19 and summarised in Table 8.3 below. These figures adopt an average sales density of £5,000 per sq.m in 2017, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2032 could support 4,070 sq.m net of sales floorspace (5,426 sq.m gross).
## Qualitative Need for Retail Floorspace

### Table 8.3: Comparison Goods Floorspace Capacity 2013 to 2032

<table>
<thead>
<tr>
<th>Centre</th>
<th>2017</th>
<th>2022</th>
<th>2027</th>
<th>2032</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Turnover Density New Floorspace (£ per sq.m)</strong></td>
<td>£5,000</td>
<td>£5,520</td>
<td>£6,095</td>
<td>£6,729</td>
</tr>
<tr>
<td><strong>Floorspace Requirement (sq.m net)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barking</td>
<td>-3,325</td>
<td>-1,441</td>
<td>359</td>
<td>1,997</td>
</tr>
<tr>
<td>Dagenham</td>
<td>-2,136</td>
<td>-1,282</td>
<td>-69</td>
<td>1,168</td>
</tr>
<tr>
<td>Chadwell Heath</td>
<td>-493</td>
<td>-234</td>
<td>87</td>
<td>423</td>
</tr>
<tr>
<td>Green Lane</td>
<td>-1,002</td>
<td>-860</td>
<td>-668</td>
<td>-461</td>
</tr>
<tr>
<td>Barking Riverside</td>
<td>-800</td>
<td>-183</td>
<td>406</td>
<td>943</td>
</tr>
<tr>
<td>Total</td>
<td>-7,787</td>
<td>-4,000</td>
<td>115</td>
<td>4,070</td>
</tr>
<tr>
<td><strong>Floorspace Requirement (sq.m gross)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barking</td>
<td>-4,433</td>
<td>-1,921</td>
<td>479</td>
<td>2,663</td>
</tr>
<tr>
<td>Dagenham</td>
<td>-2,848</td>
<td>-1,709</td>
<td>-92</td>
<td>1,557</td>
</tr>
<tr>
<td>Chadwell Heath</td>
<td>-658</td>
<td>-313</td>
<td>115</td>
<td>564</td>
</tr>
<tr>
<td>Green Lane</td>
<td>-1,336</td>
<td>-1,146</td>
<td>-891</td>
<td>-615</td>
</tr>
<tr>
<td>Barking Riverside</td>
<td>-1,067</td>
<td>-244</td>
<td>542</td>
<td>1,257</td>
</tr>
<tr>
<td>Total</td>
<td>-10,342</td>
<td>-5,334</td>
<td>153</td>
<td>5,426</td>
</tr>
</tbody>
</table>

### Qualitative Need for Retail Floorspace

8.48 Qualitative need can be assessed through consideration of the following factors:
- deficiencies or ‘gaps’ in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs e.g. deprived areas/underserved markets; and
- the quality of existing provision.

8.49 Respondents in the household survey were asked what would make them shop more often within LBBD’s four main centres. Business survey respondents were asked to rate their centre in terms of the range and quality of shops. The results within each centres respective zone are summarised as follow.

<table>
<thead>
<tr>
<th>Centre</th>
<th>Household Survey</th>
<th>Business Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(1 = very poor to 5 = very good)</td>
</tr>
<tr>
<td>Barking</td>
<td>Better choice of shops in general (37%)</td>
<td>Range of shops = score 3.17</td>
</tr>
<tr>
<td></td>
<td>Better clothing shops (15%)</td>
<td>Quality of shops = score 3.02</td>
</tr>
<tr>
<td></td>
<td>Better quality shops (12%)</td>
<td>“Too downmarket” = 56%</td>
</tr>
<tr>
<td></td>
<td>More food stores (6%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>More large shops (5%)</td>
<td></td>
</tr>
<tr>
<td>Dagenham Heathway</td>
<td>Better choice of shops in general (20%)</td>
<td>Range of shops = score 2.76</td>
</tr>
<tr>
<td></td>
<td>Better clothing shops (5%)</td>
<td>Quality of shops = score 2.57</td>
</tr>
<tr>
<td></td>
<td>Better quality shops (4%)</td>
<td>“Too downmarket” = 56%</td>
</tr>
<tr>
<td>Chadwell Heath</td>
<td>Better choice of shops in general (13%)</td>
<td>Range of shops = score 2.63</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Quality of shops = score 2.74</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“Too downmarket” = 67%</td>
</tr>
</tbody>
</table>
These results suggest that customer expectations for shopping facilities are highest in Barking town centre. The results imply customers do not expect to find a full range and choice of shopping facilities within the three smaller district centres. Issues such as car parking appear to be more important within these smaller centres. However businesses rate Barking town centre higher than the other three centres in terms of both the range and quality of shops. The three district centres were generally rated below average (a score of 3).

Barking is clearly at the top of the retail hierarchy in the Borough as indicated by the London Plan, and also in terms of the number of units and the amount of retail floorspace. Although significantly smaller, the district centres at Dagenham Heathway, Chadwell Heath and Green Lane, together with the neighbourhood centres, also perform a key role serving their more local catchments.

**Convenience Goods Shopping**

The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 65.6% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip.

There are four food superstores (over 2,500 sq.m net) within the Borough, i.e. Asda at Merrielands Crescent, Dagenham, Tesco in Barking, Morrison’s at Becontree Heath and Sainsbury’s in Chadwell Heath. The recently opened Asda at Whalebone Lane also falls within this category. In addition to these superstores, there is only one medium supermarket (over 1,500 sq.m net) within the Borough, i.e. Asda in Vicarage Field, Barking. There are a number of smaller food stores including Co-op, Iceland, Lidl and Tesco Express stores. The household survey indicates that these large food stores are the dominant shopping destinations used by residents in the Borough for main/bulk food shopping. Large stores outside the Borough, including Tesco Extra stores at Rainham, Romford and Gallions Reach, plus Sainsbury’s and Asda in Beckton are also identified as main food shopping destinations for residents in the study area.

The larger food stores are supported by a good range of smaller supermarkets and convenience stores, and there is a reasonable representation of discount food sector retailers within LBBD (See Plan in Appendix 8). Food stores within the Borough are supported by small independent convenience shops located within the main and local centres.
The retail capacity projections set out in Table 12 in Appendix 18 suggest food store commitments in Dagenham and Chadwell Heath/Green Lane should absorb expenditure capacity up to 2022. There is surplus convenience goods expenditure from 2013 in Barking, suggesting that there is a short to medium term need for additional food store development in Barking. There is limited surplus convenience goods expenditure from Dagenham at 2027, suggesting a medium to long term need for food store floorspace in this part of the Borough. There remains no requirement for food store development at Chadwell Heath/Green Lane throughout the study period.

The quantitative capacity figures therefore suggest that the priority for future food store development should be within Barking. However in qualitative terms, the current choice of food store in Barking is reasonable.

### High Street Comparison Shopping

Barking is the main high street comparison shopping destination and the highest ranking centre within the Borough. Dagenham Heathway and to a lesser extent Chadwell Heath and Green Lane also provide residents with comparison shopping facilities destinations. The smaller district centres generally have a more limited comparison goods offer. The LBBD centres are ranked below other larger centres surrounding the Borough, in particular Romford, intu Lakeside, Beckton, Ilford, Westfield Stratford and Central London, which are accessible to residents within the Borough and have a more extensive range of multiple retailers than Barking, Dagenham Heathway, Chadwell Heath, Green Lane and other small centres in LBBD.

The overview of retail centres Section 4.0 above identifies that none of the centres in LBBD has a higher proportion of comparison retail units compared with the national average. The four main centres have a reasonable range of comparison shops including a selection of national multiples. Barking has representation from the majority of the comparison goods categories within the centre, while the range is more limited in the district centres, with some categories not present or with limited choice within the categories. Within Dagenham Heathway, Chadwell Heath and Green Lane, the majority of comparison operators are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, charity shops and other day to day items.

### Bulky Goods Retail Warehouses

Retail warehousing provision within LBBD is primarily within the Merrielands Retail Park, in the south east of the Borough. Barking also contains a limited amount of retail warehouses comprising the (partly vacant) Abbey Retail Park and Wickes DIY store. LBBD is also served by bulky goods retail warehouse units located outside of the Borough, particularly at Beckton.

Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated
within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

Restaurant, Bars and Takeaways

8.61 This section assesses the need for eating and drinking establishments in the Borough (Class A3, A4 and A5).

8.62 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Coffee Republic. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

8.63 The key categories for food and beverage offers are:

1. **Impulse**: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;

2. **Speed eating fast food**: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken.

3. **Refuel and relax**: a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal;

4. **Casual dining/leisure dining**: incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

8.64 National information available from Experian Goad Plans indicates that the proportion of non-retail uses within town centres has increased over the last decade as shown in Table 8.4. The proportion of Class A1 retail uses in Goad town centres has decreased by 16% between 2000 and 2012 (9.6 percentage points), whilst Class A3/A5 food and drink uses have significantly increased in proportional terms, despite the increase in shop vacancy rate.

8.65 Growth in Class A3 to A5 uses within town centres is likely to continue in the future, as town centres seek to broaden their attraction in response to the increase in multi-channel shopping.

8.66 At present the proportion of Class A3/A5 uses within Barking town centre and Green Lane is around the national average, 14% and 15.4% respectively. The proportion is higher than the national average in Chadwell Heath (19.3%) and
below average in Dagenham Heathway (11.5%). Over half of the 94 Class A3/A5 uses within the four main centres are Class A5 takeaways, and the majority of Class A3 uses are cafés rather than restaurants. The qualitative priority for future Class A3 uses within the main centres is Class A3 restaurant rather than Class A5 takeaway uses. There are 11 Class A4 bars/public houses.

Table 8.4 GB Goad Plan Town Centres Use Class Mix

<table>
<thead>
<tr>
<th>Type of Unit</th>
<th>% Change 2000-2014</th>
<th>Proportion of Total Number of Units (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1 (Retail)</td>
<td>-16.2</td>
<td>59.1</td>
</tr>
<tr>
<td>Class A1/A2 (Services)</td>
<td>+12.4</td>
<td>18.5</td>
</tr>
<tr>
<td>Class A3/A5*</td>
<td>+43.7</td>
<td>11.2</td>
</tr>
<tr>
<td>Vacant/under Const.</td>
<td>+22.3</td>
<td>11.2</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Experian Goad Centre Reports *excludes Bars/Public Houses (A4)

Within the other local centres in the Borough there are 128 Class A3, A4 and A5 uses, of which 74% are Class A5 takeaways. The Borough has a high representation of takeaways and cafés but a relatively poor provision of restaurants and bars.

In total there are 233 identified Class A3, A4 and A5 uses within the Borough, with a total floorspace of 20,700 sq.m gross, as shown in Table 10 in Appendix 20. The Barking Riverside development is expected to include new district and neighbourhood centres. The development has planning permission for up to 19,700 sq.m gross of Class A1 to A5 floorspace. This study assumes that 20% of the overall floorspace (3,900 sq.m) could be occupied by Class A3, A4 and A5 uses.

**Food and Drink Expenditure**

Experian’s latest 2011 local expenditure figures have been adopted. Food and drink expenditure per capita projections are shown in Table 2 in Appendix 20. Experian estimate that nationally food and drink expenditure per capita is expected to increase in real terms (excluding inflation) by over 30% between 2013 and 2032.

Total food and drink expenditure is shown in Table 3 in Appendix 20, based on population figures in Table 1 and average expenditure in Table 2. Food and drink expenditure within the study area as a whole is expected to increase from £343 million in 2013 to about £551 million in 2032, an increase of about 60% i.e. half of this is due to growth in population and the other half due to national forecast growth in expenditure per person.
Base Year Food and Drink Patterns

8.71 Existing food and drink expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2013) penetration rates are shown in Table 4 in Appendix 20 and expenditure patterns are shown in Table 5.

8.72 LBBD’s market share of all expenditure within the study area is about 22%. Allowing for expenditure inflow LBBD existing facilities attract £78.74 million. Assuming the turnover of food and drink outlets in the Borough is £78.74 million, this is approximately £340,000 per outlet and the current average sales density is about £3,800 per sq.m gross. Higher quality restaurant/bars would be expected to achieve a turnover of between £0.5 million to £1 million and achieve a sales density of around £5,000 per sq.m.

Projected Food and Drink Patterns

8.73 Food and drink expenditure patterns have been projected to 2017, 2022, 2027 and 2032 in Tables 6 to 9, based on constant market shares.

8.74 The amount of expenditure attracted to the Borough is expected to increase from £78.74 million in 2013 to £139.4 million in 2032. Not all of this expenditure growth will be available to support new floorspace. There is potential for the existing provision in the Borough to increase its turnover in real terms, through qualitative improvements and increased utilisation. A cautious growth rate of 0.5% per annum has been adopted.

8.75 Surplus expenditure growth projections are shown in Table 11 in Appendix 20, and summarised in Table 8.5 below. These surplus expenditure figures are converted into floorspace projections based on an average sales density of £5,000 per sq.m gross.

Table 8.5 Food and Drink Floorspace Capacity

<table>
<thead>
<tr>
<th>Centre</th>
<th>2017</th>
<th>2022</th>
<th>2027</th>
<th>2032</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking</td>
<td>116</td>
<td>893</td>
<td>1,568</td>
<td>2,209</td>
</tr>
<tr>
<td>Dagenham</td>
<td>178</td>
<td>813</td>
<td>1,511</td>
<td>2,263</td>
</tr>
<tr>
<td>Chadwell Heath/Green Lane</td>
<td>494</td>
<td>1,069</td>
<td>1,614</td>
<td>2,193</td>
</tr>
<tr>
<td>Barking Riverside</td>
<td>-1,385</td>
<td>-961</td>
<td>-589</td>
<td>-236</td>
</tr>
<tr>
<td>Total</td>
<td>-979</td>
<td>1,813</td>
<td>4,104</td>
<td>6,431</td>
</tr>
</tbody>
</table>

8.76 As indicated earlier in this report, within LBBD’s main centres the majority (59%) of food and drink outlets are Class A5 takeaways, and only 20% are cafés and 21% are restaurants. The selection of restaurants is relatively poor. This qualitative analysis indicates that the floorspace projections above should prioritise Class A3 restaurants and Class A4 restaurant/bars rather than takeaways.
8.77 Other Class A1 and A2 Service Uses

The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 25% of shop premises to be occupied by these uses within centres, or about 15% of total floorspace.

8.78 The proportion of Class A1 and Class A2 services is relatively high in Dagenham Heathway (34.5%) and in Chadwell Heath (34.4%) and comparable with the national average in Barking and Green Lane.

8.79 Class A2 uses includes money lenders, pawnbrokers and bookmakers. The qualitative audit of centres indicates there is a high representation of these uses within LBBD, e.g. there are 19 betting shops within the four centres. The provision of additional space to accommodate further Class A2 uses of this kind is not a priority. Given the current high provision of Class A1/A2 service uses in the Borough including local centres, new town centre development within the Borough should provide less than 15% of floorspace for these uses. A figure of 5% may be more appropriate.

8.80 Commercial Leisure

This section assesses the potential for commercial leisure uses in LBBD, including cinema/multiplex, tenpin bowling, bingo, nightclubs and private health and fitness clubs.

8.81 Residents in LBBD have relatively good access to range of commercial leisure and entertainment, including facilities in neighbouring Boroughs and Central London. Most of the key sectors are represented.

8.82 Based on NLP’s experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

8.83 LBBD has a large catchment population. This catchment population has good access to major leisure facilities in Newham, Lakeside, Stratford, Docklands and Central London. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities within LBBD.

8.84 The main concentration of commercial leisure uses is at Dagenham Leisure Park, which includes a leisure centre, Vue multiplex cinema and bingo hall. This park serves LBBD and also neighbouring borough’s due to high levels of car access via the A13.
Cinemas

There are two cinemas within LBBD - Vue in Dagenham and the Broadway Cinema in Barking. In total, around 63% of respondents to the household survey results visit the cinema, and of these, 21.6% visited cinemas within LBBD. The Vue cinema in Romford (LB of Havering) attracted 20.8% of all those who visited the cinema within the study area; and the Showcase, Jenkins Lane (in LB of Newham) a further 13.9%. For those located within the Borough (Zones 1 – 3), around 55% of respondents visit the cinema, and of these, 35.5% visited cinemas within LBBD.

LBBD (Zones 1-3) has a total population of 195,858 people in 2013. This population can be converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat). This suggests that the existing population of LBBD could support 12 cinema screens, or 2,511 seats. Existing cinema provision within the Borough is 10 screens and 1,998 seats.

The catchment population for Zones 1-3 has been converted into a total number of cinema screens and seats based on the current national average. The results are shown in Table 8.6.

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2017</th>
<th>2022</th>
<th>2027</th>
<th>2032</th>
</tr>
</thead>
<tbody>
<tr>
<td>LBBD Population (Zones 1-3)</td>
<td>195,858</td>
<td>212,689</td>
<td>228,961</td>
<td>241,010</td>
<td>251,100</td>
</tr>
<tr>
<td>Cinema Screen Potential</td>
<td>12.0</td>
<td>13.0</td>
<td>14.0</td>
<td>14.8</td>
<td>15.4</td>
</tr>
<tr>
<td>Cinema Seat Potential</td>
<td>2,511</td>
<td>2,727</td>
<td>2,935</td>
<td>3,090</td>
<td>3,219</td>
</tr>
<tr>
<td>Existing Screen Provision</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Existing Seat Provision</td>
<td>1,998</td>
<td>1,998</td>
<td>1,998</td>
<td>1,998</td>
<td>1,998</td>
</tr>
</tbody>
</table>

The analysis above suggests that even if LBBD retained its cinema trips (i.e. the net in and outflow of trips from the Borough was in balance), then there is some potential to improve provision in the short to medium term. In total a further five screens or 1,200 seats could be provided towards over the plan period.

Theatres

The household survey indicated that 55% of respondents in the study area visit theatres. Theatres within Central London were the most popular destinations, attracting 60.3% of theatre goers, followed by Queen’s Theatre in Hornchurch and Kenneth More Theatre in Ilford attracting 9.3% and 8.4% of theatre goers respectively.

There are only two theatres located within LBBD. These are:

- The Broadway, Barking (attracting 5.4% of theatre goers); and
- Arc Theatre, Barking (attracting 0.8% of theatre goers).
8.91 The close proximity of LBBD to Central London has an impact on the likely demand for theatre facilities in the Borough. The relatively short journey to Central London will help meet the Borough’s need for high profile, national performances. There is therefore not considered to be a clear need for additional theatre provision in the Borough, however if proposals were brought forward, they would assist in improving the choice of facilities in LBBD.

8.92 There is potential to make better use of the Broadway Theatre as an entertainment venue and part time cinema.

Health and Fitness Clubs

8.93 The UK health club market has expanded rapidly as public awareness about personal fitness has increased. The value of the UK fitness market is now around £4 billion. Private health clubs in the UK range from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness. Public sector sports centres are also important, and the market increased significantly over the last 10 years. Over 12% of the adult population within the UK are members of health clubs.

8.94 There are a number of private health and fitness clubs in LBBD, including:

1. TBF – The Body Factory, Hedgeman’s Road;
2. Peak Fitness, Reede Road;
3. Golds Gym, Rainham Road South;
4. Energise, Brooks Parade, Green Lane;
5. Fit 4 Personal Training Centre, Chadwell Heath Lane; and

8.95 In addition to the private leisure and fitness clubs, there are several local authority owned sports centres including:

1. Abbey Sports Centre, Axe Street;
2. The Sydney Russell Leisure Centre, Parsloes Avenue;
3. Becontree Heath Leisure Centre, Althorne Way;
4. Castle Green, Gale Street;
5. Robert Clack School Leisure Centre; and
6. Warren Sports Centre, Whalebone Lane South.

8.96 The Goresbrook Leisure Centre has recently closed and a replacement facility will be open in 2014 in Barking town centre. Additional leisure facilities will be provided at Barking Riverside School in 2016.

8.97 At present LBBD has at least 12 public and private health clubs or gyms. The household survey indicates that 27.3% of respondents or their families visit a health/ fitness club. Of these around 35% did so at destinations within the centres within LBBD. For the population within LBBD (Zones 1-3), 66% of those who visit health/ fitness clubs use facilities within LBBD.
Approximately 74% of the population of LBBD is adult (aged 16 and over),
which would equate to approximately 145,000 of LBBD’s population in 2013
(Zones 1-3). This could generate demand for about 17,400 public and private
membership places, based on the national average membership rate (12%). If
66% of these membership places were retained in the Borough, then existing
health and fitness clubs in LBBD attract 11,484 members. Applying the
national average of 1,375 members per club, this suggests a need for around 8
health and fitness clubs. As noted above, 12 health and fitness clubs have
been identified in LBBD. These figures suggest that there is currently a good
provision of health club facilities.

The adult population within LBBD is expected to increase by about 41,000
between 2013 and 2032, which would generate around 4,920 new health club
members, of which 3,247 (66%) would be retained in the Borough, based on
existing market shares. This suggests that there is a requirement to provide
two health and fitness clubs in LBBD to meet this growth in demand. A new
facility to replace Goresbrook Leisure Centre and a new facility in Barking
Riverside School are expected to open soon.

This analysis suggests exiting proposals should meet future demand for health
and fitness facilities.

Tenpin Bowling

There is one tenpin bowling facility in LBBD - Dagenham Bowling at
Dagenham Leisure Park (20 lanes). Other nearby bowling destinations include
Namco Romford, Rollerbowl, Romford, All Star Lanes, Stratford, Bollywood

The household survey results suggest that 27.4% of households in the study
area visit tenpin bowling facilities, and of those who visit bowling facilities they
mainly go to Dagenham Bowling (36%), followed by Namco Romford (15%)
and The City Pavilion, Romford (14%).

The population of LBBD (195,858 in 2013) as a whole could theoretically
support 16 lanes, based on one lane per 12,000 people (national average).
Population growth within LBBD (55,242 between 2013 and 2032), could
support a further five lanes by 2032. This suggests that the existing provision
of 20 lanes at Dagenham Bowling is sufficient to meet the needs of the existing
and future population in LBBD.

Bingo

Mecca and Gala are the main bingo operators, controlling over half of the UK
market. Marketing of the bingo sector has been more proactive in recent years
and Gala and Mecca have invested in premises, moving out of dated premises
(i.e. converted cinemas) into purpose built units. Bingo clubs have become
increasingly sophisticated, and have actively sought to attract all age groups.
The bingo sector usually prefers central locations that are accessible by public
transport and by foot. Major bingo operators require buildings of between 2,000
- 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).

8.105 Within LBBD there is just one Mecca at Dagenham Leisure Park. There is a Mecca in Chadwell Heath District Centre, just over the border in neighbouring LB of Redbridge.

8.106 The household survey results indicated that only 12.7% of households in the study area visit bingo facilities. Of these, 45% visited Mecca at Dagenham Leisure Park, 11% visited Mecca Chadwell Heath and 9% visited Mecca at The Mall Mercury Gardens in Romford.

8.107 LBBD’s adult population (approximately 145,000 in 2013) could generate about 253,750 admissions based on the national participation rate (1.75 per adult). Based on national average figures (133,000 admissions per club), the LBBD population could support 1.9 bingo facilities. The adult population of LBBD is estimated to increase to around 186,000 by 2032, which suggests the population could support 2.4 bingo facilities.

8.108 Given that there is an existing Mecca bingo at Dagenham Leisure Park, and a further Mecca bingo just beyond the Borough boundary in Chadwell Heath, this is considered to sufficiently meet the requirements of the existing and future population of LBBD, and there is no need to plan for additional bingo facilities.

## Community Uses

8.109 Community uses such as libraries, halls, museums and religious institutions account for less than 5% of existing town centre floorspace based on Goad Plan data. Barking town centre has the highest proportion with 6%, followed by Chadwell Heath (5%), Dagenham Heathway (3%) and Green Lane (1%). About half of this floorspace is occupied by libraries. There is a limited provision of museums, galleries and play centres within the four town centres.

8.110 Respondents to the household survey were asked where they normally visit community facilities such as libraries and community halls. Within LBBD (Zone 1 to 3) 63% of respondents indicated they visit community facilities, and of these respondents over 86% normally visit facilities within LBBD. Barking town centre was the most popular destination, followed by Dagenham Heathway. Town centres play an important focal point for community uses.

8.111 The household survey results included questions relating to improvements that would make respondents shop in town centres more often. These results did not highlight significant deficiencies in community facilities. Less than 1% of respondents mentioned more play centres or more toilets. The business survey results also did not highlight issues relating to the absence of community facilities.

8.112 There are six libraries in LBBD, following the closure of Rush Green library. The Council’s strategy (2013 to 2016) for libraries aims to provide the highest quality, affordable and accessible library service for all those living, working and studying in LBBD. LBBD’s population is expected to increase by about
28% by 2032. Based on current provision two new libraries could be required to serve new residential areas, and these could form part of new neighbourhood/local centres.

8.113 There are 15 registered community halls or rooms for hire in LBBD. Based on current provision four new community halls could be required to serve new residential areas, and these could also form part of new neighbourhood/local centres.

8.114 In terms of future developments within town centres it may be appropriate to allow for around 5% additional floorspace to be provided to accommodate new community and cultural uses.

**Hotels**

8.115 An audit of existing hotel facilities in the LBBD has been carried out. This audit will form the basis of our assessment of the need for future facilities.

8.116 The UK hotel market represents a significant part of the leisure economy. British residents alone spent £19.5 billion on overnight trips within Great Britain in 2012 (source: Visit England). This is an increase of £1.6 billion since 2011. In 2012, Visit England’s data showed that there were 32,034 serviced accommodation establishments registered with national tourist boards, which provide 1,367,552 bed spaces. The serviced accommodation market is split with 34% of the market taken up by Bed & Breakfast accommodation, 29% Hotels and 23% Guesthouses.

8.117 The latest available data from Visit England on occupancy rates (July 2013) over the last 12 months (August 2012 to July 2013) is 67% for room occupancy and 51% bed space occupancy in hotels in England. These occupancy rates are for the year as a whole, and the rates fluctuate significantly between the Summer and Winter months. For city/large town locations, including hotels, guesthouses and B&Bs, the average room occupancy is 75%, compared to 64% in small towns, 58% in the countryside and 59% in seaside locations. Bed space occupancy in city/large town locations was 56% over the same period.

8.118 The Visit England data shows that occupancy rates have increased over the period from 2010, when room occupancy over a 12-month period in city/large town locations was 69%, 55% in small towns, 52% in the countryside and 54% in seaside locations. In London, room occupancy over the past 12 months (August 2012 to July 2013) was recorded at 81%, increased from 78% since 2010.

8.119 Mintel (2006) reported growth in the UK hotel market in the 2000s. The hotel market was significantly affected in the early part of the decade by 9/11 and foot and mouth but the UK has shown significant recovery since that point. KPMG recorded that UK hotels enjoyed double the European average growth for revenue per average room (Rev PAR) in 2005.
Between 2001 and 2006 Mintel identified that room rates were increasing, Rev PAR was increasing and the growth in hotel revenues nationally increased by 12%. The domestic holiday market remains fairly stagnant and so this growth was largely driven by inbound tourism, particularly from Europe and Asia, business travellers, weddings and weekend breaks.

Budget hotels have particularly seen growth in the 2000s with Premier Inn and Travelodge amongst the top three hotels groups by rooms in the UK. This growth has been fuelled by demand from business travellers, overnight visits and weekend breaks, which have increased.

Conversely Mintel have identified and increased demand for ‘boutique’ and ‘designer’ hotels rather than 3* chain hotels, fuelled by the increasingly sophisticated tastes of the baby boomer generation.

Since 2008, the recession has impacted upon the hotel industry. Occupancy rates have largely stayed the same but room rates have generally been reduced in order to maintain this level of demand.

Table 8.7 below summarises the hotel provision within the wider catchment area. It should be noted that this excludes guest houses, bed and breakfasts and establishments with less than 10 bedrooms. In total, there are eight establishments.

Six of the eight hotels in LBBD are part of chains. Premier Inn dominates the chain market with three hotels in the borough, with Travelodge, Ibis and Formule 1 all having one hotel in the Borough. Provision is focused towards lower-end / budget hotels, with no four or five star hotels.

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>No of Beds</th>
<th>Star Rating</th>
<th>Facilities</th>
<th>Type of Hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking Park Hotel</td>
<td>Tanner Street, Barking</td>
<td>32</td>
<td>N/A</td>
<td>Dining room</td>
<td>Independent / Budget</td>
</tr>
<tr>
<td>Travelodge - London Barking</td>
<td>Pianoworks, 4 Arboretum Place, Barking</td>
<td>66</td>
<td>Budget</td>
<td>Car Parking</td>
<td>Chain / Budget</td>
</tr>
<tr>
<td>The Barking Hotel</td>
<td>Station Parade, Barking</td>
<td>N/A</td>
<td>N/A</td>
<td>Dining room</td>
<td>Independent / Budget</td>
</tr>
<tr>
<td>Ibis – London Barking</td>
<td>Highbridge Road, Barking</td>
<td>86</td>
<td>Budget</td>
<td>Bar, café</td>
<td>Chain / Budget</td>
</tr>
<tr>
<td>Premier Inn – London Barking</td>
<td>Highbridge Road, Barking</td>
<td>88</td>
<td>Budget</td>
<td>Restaurant</td>
<td>Chain / Budget</td>
</tr>
<tr>
<td>Formule1 – London Barking</td>
<td>Highbridge Road, Barking</td>
<td>80</td>
<td>Budget</td>
<td>Car Parking</td>
<td>Chain / Budget</td>
</tr>
<tr>
<td>Premier Inn – London Dagenham</td>
<td>Chequers Corner, New Rd, Dagenham</td>
<td>80</td>
<td>Budget</td>
<td>Restaurant</td>
<td>Chain / Budget</td>
</tr>
<tr>
<td>Premier Inn – London Romford West</td>
<td>Whalebone Lane North, Chadwell Heath</td>
<td>44</td>
<td>Budget</td>
<td>Pub/Restaurant</td>
<td>Chain / Budget</td>
</tr>
</tbody>
</table>
The GLA Economics Paper “Understanding the demand for and supply of visitor accommodation in London to 2036” (August 2013) identifies that LBBD currently has 580 serviced rooms. Figure 8.4 provides an extract from the GLA Economics Paper showing the distribution of hotel accommodation in LBBD.

Figure 8.4 Existing Hotel Accommodation in LBBD

The increase in hotel occupancy rates in London over the last few years, combined with the generally higher occupancy rates in city/large town locations, suggest that there may be a need for additional hotel provision to serve LBBD.

Future Hotel Requirements

Further to the existing hotel provision in LBBD, three planning applications have been approved for hotel developments, as set out in Table 8.8.

The GLA Economics Paper suggests that LBBD has the potential to require an additional 400 rooms by 2036, targeted towards Barking town centre. If the above permissions for hotel development are implemented, this would provide an additional 294 rooms. Using the GLA figures, this suggests that there is a further need for around 100 additional hotel rooms over the study period.
Table 8.8 Hotel Planning Permissions

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>No of Beds</th>
<th>Facilities</th>
<th>Status of application</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Rainham Road South, Dagenham</td>
<td>80</td>
<td>Restaurant</td>
<td>Outline planning permission approved – 04/12 (11/01044/OUT)</td>
</tr>
<tr>
<td>N/A</td>
<td>Trocoll House, Station Parade, Barking</td>
<td>187</td>
<td>Restaurant, bar, car parking</td>
<td>Full Planning Permission approved – 11/10 (10/00350/FUL)</td>
</tr>
<tr>
<td>Premier Lodge</td>
<td>Highbridge Road Barking</td>
<td>Extension for 27 extra beds</td>
<td></td>
<td>Application Permitted – 01/13 (12/00121/FUL)</td>
</tr>
</tbody>
</table>

Employment Creation

8.130

If the floorspace requirement identified in this Study is provided over the study period, it will generate a significant number of new jobs by 2032. Table 8.9 provides estimates of the potential job creation, applying average employment densities based on the 2010 Employment Densities Guide produced by the Homes & Communities Agency and Offpat.

Table 8.9: Potential Employment Creation, 2032

<table>
<thead>
<tr>
<th>Requirements/Commitments</th>
<th>sq.m gross</th>
<th>Total jobs ratio</th>
<th>Number of Jobs</th>
<th>FTE jobs ratio</th>
<th>Number of FTE Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience Floorspace</td>
<td>6,297</td>
<td>1 job per 14 sq.m</td>
<td>450</td>
<td>1 job per 20 sq.m</td>
<td>315</td>
</tr>
<tr>
<td>Comparison Floorspace</td>
<td>5,426</td>
<td>1 job per 16 sq.m</td>
<td>339</td>
<td>1 job per 22 sq.m</td>
<td>247</td>
</tr>
<tr>
<td>Food and Drink</td>
<td>6,431</td>
<td>1 job per 15 sq.m</td>
<td>429</td>
<td>1 job per 21 sq.m</td>
<td>306</td>
</tr>
<tr>
<td>Convenience Commitments ²</td>
<td>24,078</td>
<td>1 job per 14 sq.m</td>
<td>1,720</td>
<td>1 job per 20 sq.m</td>
<td>1,203</td>
</tr>
<tr>
<td>Comparison Commitments ³</td>
<td>7,759</td>
<td>1 job per 16 sq.m</td>
<td>485</td>
<td>1 job per 22 sq.m</td>
<td>353</td>
</tr>
<tr>
<td>Service uses Commitments ⁴</td>
<td>7,700</td>
<td>1 job per 16 sq.m</td>
<td>402</td>
<td>1 job per 20 sq.m</td>
<td>385</td>
</tr>
<tr>
<td>Total</td>
<td>57,691</td>
<td></td>
<td>3,825</td>
<td></td>
<td>2,809</td>
</tr>
</tbody>
</table>

Note:

1. Average applied for restaurant uses (1 job per 15 sq.m/1 FTE job per 21 sq.m) and Class A2 financial/professional (1 job per 17 sq.m/1 FTE job per 19 sq.m)
2. Convenience commitments include Asda at Whalebone Lane (4,566 sq.m gross), Asda, London Road, Barking (2,000 sq.m gross increase), Sainsbury’s, Sanofi Aventis site (9,276 sq.m gross) and Extension to Morrisons, Becontree Heath (2,236 sq.m gross), Barking Riverside (8,000 sq.m gross)
3. Comparison commitments comprises Vicarage Fields (1,333 sq.m gross), unit shops at London Road, Barking (426 sq.m gross) and Barking Riverside (6,000 sq.m gross)
4. Service use commitments comprises Barking Riverside (7,700 sq.m gross)
The retail floorspace requirements and commitments combined could generate 3,825 direct jobs in LBBD by 2032. The potential FTE (full time equivalent) job creation is 2,809 jobs. The difference between the number of actual jobs created and the FTE is due to the relatively high proportion of part time jobs in retail and service uses. It should be noted that there will be some amount of job displacement from the existing facilities to new floorspace. However, as this estimate of job creation relates to direct jobs only, based on the amount of floorspace proposed, there will be further indirect jobs created associated with the retail and service uses.

It should be noted that the estimates of potential job creation based on the floorspace needs for LBBD over the study period vary from the estimated growth in retail jobs projected in the previous section using Experian forecasts. Insofar as the forecasts reflect past job growth, this may indicate that the Borough has been underperforming in terms of retail floorspace provision and job creation in this sector. The delivery of new, modern retail floorspace is likely to increase the future job creation within this sector, potentially above past trends.

**Conclusions**

The assessment of retail and town centre uses in LBBD considers the existing provision and whether there are any deficiencies in provision that need to be addressed, and forecasts capacity and need for additional facilities over the study period to 2032.

The retail needs assessment concludes:

1. retail commitments will absorb convenience goods growth in the short to medium term, but continued population and expenditure growth could support around 6,300 sq.m gross of convenience goods floorspace in LBBD as a whole by 2032;
2. due to commitments there is limited requirement for food store development in Dagenham, Chadwell Heath/Green Lane;
3. current proposals for a new Sainsbury’s store in Barking, if approved and implemented would absorb growth in the Barking area;
4. retail commitments will absorb comparison goods growth in the short to medium term, but continued growth could support about 5,400 sq.m gross of comparison goods floorspace in LBBD as a whole by 2032;
5. In the medium to long term, there is an identified requirement for additional comparison goods floorspace in Barking and in Dagenham, and there is limited capacity identified in the Chadwell Heath and Green Lane areas;
6. if the retail commitments do not come forward, there would be further surplus expenditure available and capacity to support additional floorspace over the study period.
8.135 The services assessment concludes:
1 it is important to maintain a reasonable proportion of service uses in all centres and additional floorspace should be provided over the plan period;
2 there is a potential requirement for an additional 6,400 sq.m gross of Class A3/A4/A5 floorspace in LBBD’s centres up to 2032, over and above commitments;
3 there is a potential requirement for an additional 1,000 sq.m gross of Class A1/A2 services floorspace in LBBD’s centres up to 2032.

8.136 The commercial leisure assessment concludes:
1 current cinema provision within LBBD is sufficient and there is limited scope for additional provision. However, our analysis suggests that the existing cinemas in LBBD are not performing well in terms of attracting local customers;
2 there is no need for additional theatres in LBBD over the study period;
3 there could be scope for between two and four additional health and fitness clubs in LBBD over the study period. This need will be partly met by the new leisure centre in Barking town centre and 3,000 sq.m of D2 leisure permitted within the Barking Riverside development;
4 the existing tenpin bowling provision at Dagenham Bowling is sufficient to meet the needs of the existing and future population in LBBD;
5 the existing Mecca bingo at Dagenham Leisure Park, and Mecca bingo just beyond the Borough boundary in Chadwell Heath, are considered sufficient to meet the requirements of the existing and future population of LBBD.

8.137 In relation to community uses the key conclusions are:
1 a limited provision of museums, galleries and play centres within the four main town centres;
2 population growth is likely to increase demand for further community facilities such as libraries, community halls and health facilities. For example two new libraries could be required to serve new residential areas.
3 These facilities could be provided in new neighbourhood/local centres within the Thames Riverside area to serve new residential development.

8.138 The hotel assessment concludes:
1 existing hotel provision in LBBD is limited, and caters for the budget end of the market;
2 there is a need for an additional 400 bedrooms in LBBD over the period to 2036, based on the recent study produced by GLA Economics;
3 there is extant planning permission for 294 additional hotel bedrooms in LBBG, suggesting that there is a further requirement for around 100 bedrooms over the study period.

8.139 Section 10.0 sets out the strategy for accommodating requirements for retail and town centre growth over the study period.
9.0 Needs of Other Uses

9.1 Reflecting the lack of any distinction between different types of economic growth and development within the NPPF, this section considers the current level of provision and distribution of some non B Class uses in the Borough, the employment potential of these uses and, as far as possible, the extent to which they are likely to create pressures on employment land in the future are examined. At the Council’s request, specific consideration has been given to energy generation, public administration, healthcare and education activities, as well as religious meeting places and residential development.

Context

Growth Forecasts

9.2 Drawing on the Experian employment forecasts used in Section 8.0, non B-class jobs currently account for about 33,400 jobs in the Borough, some 60% of all employment. This sector is forecast to increase by around 7,650 jobs over the period to 2032, broadly maintaining its overall share. Figure 9.1 compares the size of the non B-class sectors (based on their 2013 employment level) and forecast percentage growth rate between 2013-32. This sector is expected to see job losses of around 500 between 2013 and 2032, equivalent to a decline of approximately 21%.

Figure 9.1 Job Growth of Selected Non B Class Sectors in Barking & Dagenham 2013-2032

Source: Experian / NLP analysis

31 Experian 2013
Development Pressure from Non B Classes

9.3 Because the land and space requirements of non B-class sectors can vary considerably, it is also important to consider the extent to which growth of these activities is having a direct impact through competition with B class employment space. Anecdotal market feedback indicates that the main pressures on employment space in Barking & Dagenham in the past have come from residential development (albeit not at a significant scale) and D1 uses, particularly religious meeting places.

9.4 Taking account of this and sectors predicted to experience job growth, the following sectors have been identified for specific consideration: energy generation, public administration, healthcare and education uses. It is important to note that the job and space requirements of these sectors are usually estimated and planned for quite differently from the B class uses. For example, schools are planned for based on forecast numbers of children and capacity in existing provision while a new hospital or university is likely to have a quite specific land requirement not directly related to job numbers.

Utilities/Energy Generation

9.5 The utilities sector currently accounts for about 760 jobs in the Borough, making it one of the smallest non B class sectors in employment terms. However, the sector experienced significant job growth in recent years, equivalent to nearly 220% between 1997 and 2013 (albeit from a low starting point). Experian data implies that employment within the Borough’s utilities sector is forecast to grow at a much slower rate in future, by nearly 10% to 830 jobs by 2032. As shown in Figure 9.2 below (which uses IDBR business data to plot the location of utilities firms in the Borough), utilities activity is dispersed across the Borough but tends to be concentrated within the Borough’s key industrial areas to the south of the A13.
9.6 This sector also includes waste management and transfer facilities as well as recycling and energy from waste facilities. Barking & Dagenham has significant waste management provision, particularly within the Dagenham Dock area of the Borough. Although most efficient modern facilities are not particularly labour intensive, ‘spin-off’ industrial activities may support greater levels of employment.

9.7 A new energy generation facility has been developed to generate low carbon renewable combined heat and power at the London Sustainable Industries Park in Dagenham, which the operator estimates will create about 35 direct permanent jobs. The Thames Gateway Energy Facility (TGEF) is accommodated on a site that was the former set down area and equipment store for the Channel Tunnel Rail Link and will generate low carbon renewable energy from materials that would otherwise have been disposed of at landfill sites outside of London.

9.8 The London Plan SPG on Land for Industry and Transport identifies a net indicative land requirement of -15.7ha (i.e. over-capacity) for waste management and recycling activities within Barking & Dagenham based on an apportionment of waste requirements. On the basis that existing waste and recycling facilities within the Borough are located within wider employment areas (including SILs), it is likely any future land needs associated within the
sector will continue to come forward on, and to some extent compete with, B-class employment land. However, the SPG concludes that the likely land requirement for this sector in Barking & Dagenham can be wholly accommodated by existing identified capacity, and implies that there is a level of over-capacity within the waste management and recycling system within East London. This could therefore minimise the potential pressure that this use will place upon employment areas in the Borough in future.

Public Administration

9.9 This sector mainly comprises council run and funded public services that typically utilise office space as well as purpose built facilities such as depots, fire and police stations. Barking & Dagenham has a sizeable public administration employment base, with approximately 2,500 workforce jobs recorded in 2013. This makes the sector one of the largest non B class employers in the Borough, having increased by just under 10% in employment terms over the last 16 years (1997-2013). However, employment is forecast to decrease by around 500 jobs to 2032, representing a decline of around 20%. The majority of public admin activity tends to be clustered in and around Barking Town Centre and also across Northern areas of Dagenham (Figure 9.3).

Figure 9.3  Spatial Distribution of Public Admin & Defence Sector in LBBD

Source: IDBR/ONS/NLP analysis
9.10 Although the job and space requirements of public admin activities are quantified and planned for differently from the B class uses, in some cases they are likely to make use of traditional B class (i.e. office and industrial) space. This tends to occur on Council owned and operated sites (for example along the Rainham Road area of Dagenham), with few examples of public admin use occupying commercial market space (for example, the Barking office of the Valuation Office Agency (VOA) occupies space in Crown House, on Linton Road in Barking town centre). This suggests there is a limited existing relationship between public admin uses and traditional B class space in the Borough, and this is expected to continue in future with employment within this sector anticipated to decline (as implied by Experian forecasts). It is also worth noting that the Council are currently exploring an accommodation strategy which is likely to involve rationalising its existing portfolio of premises.

Healthcare

9.11 This sector includes hospitals, medical centres, GP and dental surgeries, both public and privately run. The healthcare sector currently accounts for about 2,140 jobs in the Borough and has experienced significant employment growth over the last 16 years equivalent to over 80%. Experian data implies that employment within the healthcare sector in Barking & Dagenham is forecast to grow by nearly 23% to 2,630 jobs by 2032.

9.12 Healthcare related activity is dispersed across the Borough as shown in Figure 9.4, but with particular concentrations in and around the district centres of Dagenham and Chadwell Heath, as well as Barking Town centre. The NHS Outer North East London Estates Strategy (2011), states that there are currently 101 GPs in the Borough, accommodated within GP surgeries and the Borough’s 15 health centres.
The LBBD Joint Strategic Needs Assessment (JSNA) 2013 provides a comprehensive assessment of the health, wellbeing and social care needs of the local population. It notes that life expectancy is significantly below the national and London average for both men and women, with particular problems related to cancer, and cardiovascular disease.

The Council’s Draft Community Infrastructure Plan (2012 – 2025) establishes the community infrastructure requirements to support the growth planned in LBBD across a number of categories including healthcare. It identifies a budget shortfall of £22,144,757 for meeting future healthcare facility needs generated by 36,082 new residents in the Borough, equivalent to provision for an additional 20 GPs, 75 acute care hospital beds and 25 other hospital beds.

NHS Barking and Dagenham have identified the need for improved local health care facilities to meet existing and new demand. A number of Key Regeneration Area sites in the Borough have been identified to accommodate new health facilities including South Dagenham West, South Dagenham East and Barking Riverside. Although any new healthcare facilities on these sites would likely be brought forward as part of a wider mixed use (residential led) development, it is important to note that some of these sites will also need to accommodate an element of B class business space over the plan period if the...

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32 Based on the London Plan 2011 minimum annual housing target for the Borough
Borough is to satisfy the requirement emerging from the analysis undertaken as part of this study (see Section 7.0).

**Education**

9.16 Education represents the largest employment sector in Barking & Dagenham, accounting for over 6,000 workforce jobs in 2013 (11% of total employment in the Borough). This reflects the presence of a number of large educational institutions including Barking & Dagenham College and over 50 schools, which are dispersed right across the Borough (Figure 9.5). Employment within the Borough’s education sector grew by just over 18% over the last 16 years, and is expected to increase by nearly 1,500 to 7,500 jobs by 2032. This is equivalent to a growth of 25%, exceeding forecasts for Greater London and the UK.

Figure 9.5 Spatial Distribution of Education Sector in LBBD

9.17 The Council’s Draft Community Infrastructure Plan (2012 – 2025) establishes the education requirements to support the growth planned in LBBD. It identifies a budget shortfall of £147,613,529 for meeting future education facility needs generated by 36,082 new residents in the Borough, equivalent to provision for an additional 6,398 primary school places and 4,570 primary school places by 2025.

9.18 The Borough’s school building programme (formally Building Schools for the Future) seeks to address this shortfall and the Core Strategy Site Specific

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Based on the London Plan 2011 minimum annual housing target for the Borough
Allocations DPD identifies a number of sites for the creation of new schools in the Borough during the period 2010 – 2025, including Barking Riverside, South Dagenham West, South Dagenham East and Sanofi Aventis. Some of these sites are designated as ‘Key Regeneration Areas outside Barking Town Centre (CM2)’ in the Core Strategy. Although they are not currently protected for B class employment use, analysis undertaken in Section 7.0 suggests that these sites may have to play a role in accommodating some of the Borough’s requirement for B class space over the plan period to 2032, to ensure that these business needs can be met within the Borough boundary.

**Places of Worship**

Due to the nature of religious meeting places, it is difficult to clearly align this use with any individual sector for the purposes of estimating the number of people employed by such institutions in the Borough and the growth needs that these uses may have over the plan period. However, IDBR and BRES data indicates that just under 200 people are currently employed by religious membership organisations in Barking & Dagenham and Experian data indicates that this sector is not anticipated to record any significant growth in employment terms to 2032.

LBBBD is a multi-faith Borough and consequently there is a demand for a range of religious meeting places and places of worship to ensure all groups of the community are provided for. Analysis of 2011 Census data indicates that almost 56% of the resident population are Christians, comparatively, this is less than the national level of 59% but higher than the percentage for Greater London as a whole (48%). Following Christianity, the largest religious groups include Muslim (14%) and Hinduism (2.5%), while there are also smaller populations of Sikhs, Buddhists and Jews. Notably, over 25% of residents stated that they had ‘no religion’ or did not state their religion; this indicates that there may also be a latent demand for non-conventional places of worship.

National, regional and local planning policy including the NPPF, the London Plan 2011 and LBBBD’s Core Strategy 2010 recognises the need for places of worship and require additional and enhanced social infrastructure provision to meet the needs of a growing and diverse population. Places of worship fall within use Class D1, non-residential institutions.

The Council’s Religious Meeting Places Planning Advice Note 4 (2012 Update) (PAN4) outlines the position on preferred locations for places of worship. In line with Core Strategy policy CC2, locations which are easily accessible by walking and cycling and benefit from good transport links are favoured. Consequently, town and district centres within the Borough and two Site Specific Allocations, SM2 South Dagenham West and SM4 South Dagenham East are identified as the Council’s preferred locations.

Turning to employment areas, it is the Council’s objective to safeguard employment areas and to retain and encourage employment opportunities in
the Borough, therefore any proposal which is detrimental to this objective will not be permitted.

However, PAN4 states that applications for places of worship may be permitted where exceptional circumstances exist, where it can be demonstrated that;

1. The premises have been unused for at least 12 months and marketed during that time at reasonable rents for the permitted uses;
2. It would not result in the amount of vacant employment floorspace falling below 8% of total existing employment floorspace in the area.
3. There is a robust transport assessment which demonstrates that it will not lead to unacceptable impacts on the existing highway network;
4. Car parking demands can be met within the curtilage of the development;
5. There would be no conflicts between the proposed use and the day to day operation of existing businesses in the area.

PAN4 indicates that retail warehouse parks will be considered as places of worship if it can be demonstrated that they are vacant and no longer required for retail warehousing purposes, while residential areas and designated local centres and parades will be considered as an appropriate location if the proposal will have no significant adverse effect on surrounding neighbours and that there is no opportunities in other preferred locations.

Based on a search of the Council’s planning portal, approximately 60 planning applications relating to places of worship have been submitted between 1998-2013, of which 28 (46%) were submitted between 2011-2013. These comprise primarily of continuance of use or change of use applications, the majority of which relate to industrial or office buildings. These applications are distributed across the Borough, however, there are concentrations in a number of designated employment areas including; Thames Road, Ripple Road, Selina’s Lane and Wantz Road. Although a number of these applications are currently under consideration, almost 50% of applications were permitted. This research implies that there is increasing pressure on employment land from places of worship, and this trend is likely to continue in light of current Council policy.

**Residential Development**

Barking & Dagenham is experiencing rapid population growth and this trend is expected to continue in future. The Borough’s Core Strategy plans for at least 17,850 new homes between 2010/11 and 2024/25, equivalent to 1,190 additional homes per year.

As noted previously (Chapter 5.0), the majority of new residential development in Barking & Dagenham in the past has been on cleared industrial sites or brownfield sites, resulting in limited pressure on B1 conversions to residential

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35 This is not considered to be a comprehensive review of monitoring data.
in recent years. Following the introduction of new PD rights for change of use from offices to residential, the Council were one of very few authorities in London to not submit an exemption request, with only a handful of small scale applications having been received to date. Furthermore, residential values are reportedly not currently at a level which sufficiently incentivises the acquisition and redevelopment of some of the Borough’s former industrial sites, particularly away from key regeneration areas such as Barking Town Centre, Barking Riverside, Dagenham Dock and the SILs. For example, the Planning Prospectus for Beam Park (South Dagenham (East)) acknowledges the need for a fresh approach to regenerate the site in light of the lack of progress made over the last ten years (which initially targeted residential led development) and within the context of the current economic climate, by prioritising a range of other mixed uses.

Through Policy CM1 ‘General Principles for Development’, the Borough’s Core Strategy states that:

“Residential development (particularly higher density development) will be focussed in the Key Regeneration Areas of Barking Town Centre, Barking Riverside and South Dagenham, and on previously developed land in other areas which have high Public Transport Accessibility Levels (i.e. levels 4-6). Employment growth will be focussed on Dagenham Dock as well as the other designated Strategic Industrial Locations and Locally Significant Industrial Sites as defined in the reasoned justification to Policy CE3 and as shown on the Proposals Map” (p.22)

Therefore in the future, it is likely that the greatest pressure placed on traditional B class uses from residential will be concentrated within the Key Regeneration Areas of the Borough, where employment activities are currently accommodated (such as office space within Barking town centre) and where new employment development may need to be considered in light of Core Strategy policy and if Barking & Dagenham’s business needs are to be met within the Borough boundary.

Conclusions

Growth of Non B Class uses is likely to make an important contribution to employment growth in Barking & Dagenham by 2032. The growth needs of a number of Non B sectors have been considered where job growth is forecast although there is limited potential for this to create pressures on employment land. These sectors include energy generation, public admin, education and healthcare uses.

Barking & Dagenham’s future land requirement for waste purposes appears to be low with a surplus of capacity identified by the Land for Industry and Transport SPG. Meanwhile there appears to be a limited existing relationship between public admin uses and traditional B class space in the Borough, with

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36 The Borough’s Core Strategy identifies capacity for at least 12,000 new jobs focused in Barking Riverside, South Dagenham, Dagenham Dock and Barking Town Centre
this trend expected to continue in future as the sector continues to record job losses. Although the Borough identifies a requirement for new and expanded education and healthcare provision over the plan period, this is likely to be focused upon the Borough’s Key Regeneration Areas where capacity is reported to exist for large scale, mixed-use development. Analysis implies that there is increasing pressure on employment land from places of worship, particularly while Council policy permits this type of use within the Borough’s employment areas (albeit on a restricted basis). There has been limited pressure on B1 conversions to residential in recent years in Barking & Dagenham, although the focus on the Borough’s Key Regeneration Areas for new residential development (where new employment development may also need to be considered) may start to change this dynamic as these different uses compete for space.
10.0 Policy and Delivery Implications

10.1 This section considers appropriate policy approaches and measures in relation to inform future planning for employment, retail and town centre uses in the Borough. It is noted that the Core Strategy, the Site Development Policies DPD and the Barking Town Centre Area Action Plan are all adopted so these comments are intended only for consideration in any future review of such documents.

10.2 Business and Employment Uses

The forecasts considered in previous chapters indicate the broad scale and type of employment growth as a basis for estimating floorspace and land requirements for B-class uses. To varying degrees, they reflect both indigenous needs arising within the Borough as businesses establish and grow, and footloose demand which operates across the Borough’s boundaries from the wider London area. The principles of the NPPF indicate that the Council’s policy approach should aim to at least fully meet employment space needs across the functional market area so that the local economy is not constrained and potential investment is not diverted elsewhere or lost (recognising that developments in adjoining areas will be a key influence).

10.3 Planning for employment uses will need to be balanced against pressures from other land uses, as well as other Core Strategy objectives such as planned housing. B-class employment development also competes with non B-class uses such as retail, leisure and community uses, which in themselves may generate employment and support local economic benefits. This requires choices about which sites to allocate or safeguard, or to release (either in whole or part) to other uses. Approaches to providing for the different B-class uses are provided below.

10.4 As an over-arching issue, one of the key points arising from the earlier analysis is the need to clarify the extent to which mixed-use Key Regeneration Area sites will contribute to new employment space as they come on stream. For example, the Council’s future policy position on these sites (including Barking Riverside, Beam Park and South Dagenham (West) could set clearer parameters and expectations for the amount of employment space to be provided, which would help provide greater certainty to potential investors (or those displaced from other sites) and also more certainty to the market. This could for example involve the creation of a Development Brief for each site to provide greater certainty on the types of development that will be supported by the Council.

10.5 Office Uses

LBBD has declined in office market terms over the past few decades, as noted in recent London Office Policy Review (LOPR) reports and reflecting wider market trends whereby office space has gradually been consolidated towards
central London and away from outer Boroughs that may have traditionally attracted larger scale office activity in the past. During the 1970s and 80s, Barking town centre had a reasonably active office market associated with shipping, insurance and construction sectors which had relocated from the City of London. However, the market has since retreated and the stock of office accommodation has gradually declined and is now mostly of poor quality. A modest office market remains, but this is now localised and almost exclusively located within Barking town centre. Analysis within LOPR reports has consistently identified limited potential for offices in other locations in the Borough including either Barking Reach or Dagenham.

10.6 Whilst previous LOPRs suggested that Barking town centre may be appropriate for office-led, mixed use development, the current view is that significant office development is likely to concentrate on other East London centres notably Stratford, and therefore the latest LOPR suggests that the town centre be re-classified for non-office led development. This situation in part reflects the lack of rental values to support new office development which is in turn a reflection of the lack of attractive office accommodation to draw office occupiers to the Borough. However, there have been some recent examples of refurbished (e.g. Maritime House) and converted quasi (e.g. the Granary) office space coming forward as well as small scale office space in enterprise centre type accommodation which have largely satisfied the latent demand for accommodation, at least in the short to medium term.

10.7 Looking ahead, the forecast requirements of between 24,430sq.m to 41,240sq.m or 2.2ha to 3.7ha of office space amount to between 47%-80% of the current stock of office space LBBD recorded by the VOA, to be delivered over a 19-year period and probably alongside some losses of older space (e.g. through changes of use). The levels of demand are unlikely to justify significant new office development in the Borough, however, the combination of forecast job growth in office-based sectors alongside new housing development and wider enhancements to Barking town centre may help support some revival of the office market. To be realistic, the scale of ambition may be relatively modest, recognising that the focus will be on retaining existing local office employers and allowing for their expansion rather than necessarily attracting larger office firms to the Borough. Development requirements will be for smaller-scale but higher quality, modern specification office accommodation than exists at present. Larger footplate schemes in out-of-centre locations are less likely.

10.8 In this context, the adopted Core Strategy’s focus on the primacy of Barking town centre for office development (in line with the sequential approach more broadly) is appropriate, and reflects where 80% of the Borough’s office accommodation is already located. Additional policy support could be provided to encourage new office accommodation to be delivered as part of mixed-use developments within the town centre or through refurbishment/conversion of older buildings. At a more specific level, the Town Centre Area Action Plan identifies the main sites where office development is encouraged. The indicative capacity figures for office accommodation set within individual site
specific allocations may need to be reviewed in light of the range of overall office floorspace requirements identified through this study.

**Industrial Uses**

10.9 LBBD has undergone significant ‘deindustrialisation’ within recent decades, and has seen contraction or withdrawal of some large-scale manufacturing activities, notably Ford and Sanofi Aventis. However, the Borough remains an important industrial location in the wider East London context, and the market analysis indicates a reasonably healthy industrial market with strong demand and low vacancy levels. New initiatives have gained traction, particularly the Dagenham Dock Sustainable Industries Park. Employment forecasts point to a continued, but slower rate of manufacturing job losses, offset by growth of warehousing and distribution activities.

10.10 While some older industrial space is gradually becoming redundant, this does not necessarily mean there is no requirement for new industrial space in the future. One of the key trends the Council must seek to manage is the gradual shift from older ‘legacy’ industrial space to the provision of new space fit for modern purposes. In this context, the market analysis indicates a ‘two-tier’ industrial market:

1. the role that the Borough plays in accommodating strategic distribution and warehousing activities as an accessible location in East London with access to key routes (both road and rail). Market demand in this sector is reported to be strong, has driven recent new development and investment, and will likely grow in the future for uses such as e-fulfilment centres that are well located to serve the London market.

2. a smaller-scale local industrial role, some which is long-standing in the Borough reflecting historical factors and availability of land, but also forms part of the ‘servicing’ role for the wider London economy (e.g. couriers, catering services etc). Some of these activities are being ‘imported’ as industrial uses are increasingly displaced from inner London Boroughs, whilst some have also moved further out towards the M25.

10.11 Industrial land supply in the Borough has tightened in recent years as land has been released to other uses and new development has been limited, with industrial vacancy currently reported to be amongst the lowest in the wider East London market area. The main gap in supply is good quality (‘Grade A’), modern industrial premises particularly of a larger scale and for readily deliverable sites to meet immediate requirements. In quantitative terms, the demand-supply balance analysis contained in Section 7.0 indicates sufficient industrial land supply available to meet future needs under all scenarios of growth. The industrial land surplus ranges from between 40 to 70 ha.

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37 Between them, these two firms are estimated to have accounted for approximately 3,700 job losses in the Borough over the last 16 years
However, this position is very sensitive to the assumptions on sites that will be available to deliver new employment space; some are designated as 'key regeneration sites' for mixed-use development and are not currently available for development. In a ‘worst case’, if none of the mixed-use sites contributed any new industrial space the surplus could change to a shortfall of land under three of the four scenarios considered. The latter is more aligned to the market feedback that available land is somewhat scarcer than the total potential supply would imply. This analysis indicates that the key regeneration sites need to provide between 12 and 40 ha of industrial land if the Borough’s industrial needs are to be met in full.

The Borough’s policy approach to industrial land is framed by the London Plan tiered designations (i.e. SILs and LSISs), and the Core Strategy reflects these by safeguarding approximately 85% of the employment land supply assessed through this study, with the remaining 15% not having any formal employment designation (although some are identified as mixed-use regeneration areas). Related to this, the Land for Industry and Transport Supplementary Planning Guidance categorises LBBD as a ‘limited’ transfer borough – this encourages boroughs to manage and reconfigure their industrial land portfolios in order to safeguard the best quality sites and phase release of vacant or surplus land. Policy CE3 of the adopted Core Strategy reflects these requirements, with a hierarchical approach to the safeguarding and release of land.

The potential oversupply of industrial land in quantitative terms under the baseline or ‘best case’ supply scenario creates potential for release some employment land to other uses. The Land for Industry and Transport SPG sets an indicative annual release benchmark of 1.8 ha per annum over the period 2011-2031, equivalent to 35 ha in total, but notes this will be subject to review through future ELRs. Depending on the scenario, the analysis in this study indicates potential to release between 42 and 132 ha of industrial land which equates to between 2.3 and 7.1 ha per annum, in excess of the SPG benchmark. However, as noted earlier, the industrial land surplus is contingent on a number of larger mixed-use regeneration sites contributing some industrial supply and in the absence of these there would be less scope for further land release.

Any releases of land need to be undertaken in a managed way reflecting the need to balance the nature of quantitative requirements based on employment forecasts (which will be subject to change and revision over time), and qualitative factors such as the need in wider economic development terms to ensure diversity and choice, the Borough’s constraints on finding new development sites in future, reported shortages of particular types of premises, and the reality that once these types of sites are lost some may be difficult to replace particularly in the context of significant housing requirements. This process will also need to be considered in the context of the earlier caveats about to what extent mixed-use sites contribute to new employment space as they come on stream. The Council’s future policy position on the key regeneration sites could set clearer parameters for the amount of employment space to be provided, which would help provide greater certainty to potential
investors (or those displaced from other sites) and also more certainty to the market.

10.16 The starting point as established by current policy for any releases of surplus industrial land is undesignated sites, subject to criteria on vacancy, marketing and availability of suitable alternatives. Where sites are currently occupied, determination of applications should have regard to whether existing activities can be retained on other sites within the Borough so that business needs are not unduly displaced.

**Constructing a delivery trajectory for employment sites**

10.17 In addition, and particularly within the context of uncertainty surrounding the future role of Key Regeneration Area sites in meeting the Borough’s B class development needs, it is recommended that the Council should evidence how its portfolio of undeveloped or cleared sites, planning permissions and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five year periods) by identifying a realistic delivery trajectory for employment sites. This accords with the approach set out in the former SEEPB guidance on employment land assessments which encouraged local authorities to demonstrate a five-year rolling supply of employment land. Where any gaps are identified, the Council will want to consider options for how this can be addressed.

10.18 In determining the likely timing and availability of land, this delivery trajectory should have regard to:

a. the planning status of sites (extant planning permission, allocation etc.);

b. development constraints/costs and known requirements for infrastructure;

c. current developer/landowner aspirations; and

d. market delivery and viability factors.

10.19 The assessment provides the opportunity to identify and map out the ‘when’, ‘who’ and ‘how’ employment space delivery actions for each site. In turn, it will also offer a basis to continually assess the potential role of a site in meeting employment land and other Core Strategy objectives. The trajectory should be linked to the annual monitoring process and periodically updated to ensure the rolling supply of employment land during the Plan period.

**Retail and Town Centre Uses**

**Floorspace Projections**

10.20 The floorspace projections set out in the previous sections assume that new shopping facilities within LBBBD can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the
scope for new floorspace and the appropriate location for this development, as follows:

1. major retail developments in competing centres;
2. the re-occupation of vacant retail floorspace;
3. the availability of land to accommodate new development;
4. the reliability of long term expenditure projections;
5. the effect of internet/home shopping on the demand for retail property;
6. the level of operator demand for floorspace in LBBD;
7. the likelihood that LBBD’s existing market share of expenditure will change in the future in the face of increasing competition;
8. the potential impact new development may have on existing centres.

10.21 Projections up to 2022 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2027 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

10.22 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers’ home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

10.23 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within LBBD, over and above commitments during the study period (to 2032). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

10.24 Table 10.1 below summarises the floorspace requirements in LBBD in 2032, over and above commitments.

10.25 The audit of centres and qualitative assessment indicates that the priority for new Class A3/A4/A5 uses within the four main centres is restaurants and restaurant/bars rather than Class A5 takeaway uses. The priority for Class
A1/A2 other non-retail services is for uses other than bookmakers, estate agents, pawnbrokers and money lending outlets.

Table 10.1: Summary of Floorspace Requirements over and above Commitments, 2032 (sq.m gross)

<table>
<thead>
<tr>
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<th></th>
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</thead>
<tbody>
<tr>
<td>Barking</td>
<td>4,951</td>
<td>2,663</td>
<td>2,209</td>
<td>517</td>
<td>10,340</td>
</tr>
<tr>
<td>Dagenham</td>
<td>1,874</td>
<td>1,557</td>
<td>2,263</td>
<td>300</td>
<td>5,994</td>
</tr>
<tr>
<td>Chadwell Heath</td>
<td>221</td>
<td>564</td>
<td>2,193</td>
<td>157</td>
<td>3,135</td>
</tr>
<tr>
<td>Green Lane</td>
<td>213</td>
<td>-615</td>
<td>-</td>
<td>-</td>
<td>-402</td>
</tr>
<tr>
<td>Barking Riverside</td>
<td>-963</td>
<td>1,257</td>
<td>-236</td>
<td>3</td>
<td>61</td>
</tr>
<tr>
<td><strong>LBBD Total</strong></td>
<td><strong>6,297</strong></td>
<td><strong>5,426</strong></td>
<td><strong>6,431</strong></td>
<td><strong>977</strong></td>
<td><strong>19,131</strong></td>
</tr>
</tbody>
</table>

Source: Table 13, Appendix 18, Table 13, Appendix 19 and Table 12, Appendix 20

Strategy for Accommodating Retail and Town Centre Growth

10.26 The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. In considering this important issue the following factors should be assessed:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

10.27 All development should be appropriate in terms of scale and nature to the centre in which it is located.

10.28 Some forms of retail or leisure facilities, which serve more localised catchment areas, may be more appropriate within local centres, rather than the main centres. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

10.29 The existing stock of premises may have a role to play in accommodating projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace and 0.5% for Class A3, A4 and A5 floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
There are 61 vacant shop units within the four main centres in the Borough, a vacancy rate of about 10%, which is below the Goad national average (12.1%). The amount of vacant floorspace in these four centres is about 9,000 sq.m gross. The vacancy rate is relatively low in Chadwell Heath (5.9%) and Dagenham Heathway (8.8%). Green Lane has the highest vacancy rate (14%). The vacancy rate is 10.1% in Barking town centre. Within other local centres there are 100 vacant shop units and the vacancy rate is around 14.8%. The overall vacancy rate in the Borough is 12.5% (161 units).

Vacant premises should help to accommodate growth. If the current vacancy level fell to below 8% (the pre-recession level) then about 60 vacant properties could be reoccupied. Reoccupied units could accommodate about 6,000 sq.m gross of commercial space (assuming 100 sq.m gross per unit). Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- Barking town centre 600 sq.m gross
- Dagenham Heathway 100 sq.m gross
- Chadwell Heath 0 sq.m gross
- Green Lane 700 sq.m gross
- Local centres/parades 4,600 sq.m gross
- Total 6,000 sq.m gross

If this reduction in vacant units can be achieved then the overall baseline Class A1 to A5 floorspace projection would reduce from 19,100 sq.m gross (Table 10.1 above) to 13,100 sq.m gross.

Most (62%) of the existing vacant units are in local centres and are generally small and in secondary locations. These units may not be attractive to retailers seeking modern units. The four main centres are likely to remain the focus for Class A1 retail use, particularly comparison shopping, and retail uses should be safeguarded in these centres. Vacant premises within local centres provide significant opportunities to accommodate non-retail services catering for the needs of local communities.

It is most likely that the vacant units will be reoccupied for non-A1 retail uses, and the Council should take a flexible approach to application for the change of use of vacant retail units in secondary area where this could improve activity and investment in the town centres.

**Development Opportunities**

This section reviews potential development opportunities to accommodate the future floorspace requirements for retail and town centre uses identified in the capacity assessment. A schedule summarising the sites that have been assessed is included at Appendix 21.
Barking Town Centre

10.36 As the main retail centre in the Borough, it is appropriate for a significant proportion of retail and town centre development to be directed to Barking town centre, to strengthen its role, in particular comparison goods retail. The capacity assessment identifies a need for 4,951 sq.m gross convenience goods floorspace, 2,663 sq.m gross comparison goods floorspace, 2,209 sq.m gross Class A3/A4/A5 floorspace and 517 Class A1/A2 service floorspace by 2032, totalling 10,340 sq.m gross, over and above existing retail commitments.

10.37 There are a number of development sites within or adjacent to Barking town centre that could assist with meeting this floorspace need, as follows:

1 London Road/North Road – site currently being redeveloped to provide new Asda store, unit shops and an enhanced market. This commitment has been taken into account within the capacity figures;

2 Vicarage Field Shopping Centre – short term priority should be reoccupation/reconfiguration of Asda store once it relocates to London Road and the implementation of the existing commitment (as reflected within the capacity projections);

3 Barking Station – site identified for mixed use redevelopment, could include between 5,000 and 10,000 sq.m gross retail/service floorspace. Most significant development option for Barking town centre in the medium to long term;

4 Abbey Retail Park – potential to intensify retail use on this edge of centre retail park. Current application for Sainsbury’s supermarket on the site;

5 London Road/Linton Road/George Street – potential longer term opportunity for redevelopment, could include up to 5,000 sq.m gross retail/service floorspace.

10.38 Further windfall opportunities may become available in Barking town centre, however these are likely to be small scale. The short term strategy for Barking should be to upgrade the environment of the existing retail areas and seek to reduce the number of vacant units.

10.39 Barking town centre needs to become a more desirable destination, and there is a need to create more of an all-round experience. With a higher proportion of disposable income spent on entertainment, people increasingly expect the shopping experience to include retail, leisure and catering options. For centres to compete with the ease of home/internet shopping, every effort has to be made to make people want to go shopping, and getting the mix and balance of uses right will make shopping centres more attractive and successful.

10.40 The outcome of the planning application for a Sainsbury’s store at Abbey Retail Park, will have implications for the strategy for Barking town centre. If the development is approved and is implemented then there will be limited scope for further convenience goods retail uses for the foreseeable future. The
priority for the Vicarage Fields shopping centre, following Asda’s relocation would be to accommodate the projected need for further comparison goods retail floorspace and Class A2 to A5 uses. It us likely that both Abbey Retail Park and Vicarage Field shopping centre will need to make a contribution in accommodating future growth (convenience, comparison and other A class uses).

10.41 It may be appropriate to identify a restaurant quarter within the town centre, potentially within the Barking Station redevelopment, that could provide a range of family restaurants and leisure units to aid the evening economy.

Dagenham Heathway

10.42 Within Dagenham Heathway, development options for additional retail floorspace are limited. The future strategy should be to focus on small scale intensification and extensions. The centre is constrained by surrounding residential uses and by the railway line.

10.43 The capacity assessment identifies that there is an identified need for around 6,000 sq.m gross of additional retail and service floorspace in Dagenham by 2032. Given that there are limited development opportunities to accommodate growth in floorspace, it may be more appropriate to direct the floorspace towards the major housing growth area at Barking Riverside, as set out below.

Chadwell Heath

10.44 Within Chadwell Heath, development options for additional retail floorspace appear to be limited and the centre may not be capable of accommodating projected growth. The future strategy should be to focus on the reoccupation of vacant units and small scale intensification and extensions. The centre is constrained by surrounding residential uses. The centre is well served by existing retail provision, most notably the Sainsbury’s supermarket on High Road.

Green Lane

10.45 Within Green Lane, development options also appear to be limited, and the future focus is likely to be small scale intensification and extensions. The centre is constrained by surrounding residential uses. Green Lane has the highest proportion of vacant units in LBBD, and the priority should be the reoccupation of vacant units.

Other LBBD/Retail Parks

10.46 Proposals to extend the existing Morrison’s store may provide an opportunity to create a new district centre to the east of Green Lane. If Green Lanes and Chadwell Heath cannot accommodate future demand for shops, services and leisure facilities within the local area, then the Becontree Heath area could be expanded to provide an integrated centre
10.47 The development of retail floorspace within Barking Riverside will absorb some of the retail capacity in LBBD. If residual floorspace requirements for LBBD over and above commitments cannot be accommodated in the existing town and district centres in the Borough, there may be scope to provide further retail facilities within the Barking Riverside area.

10.48 Retail warehouse parks in the Borough are likely to continue to be the focus for large format retail units selling bulky comparison goods. This sector has declined during the recession but is likely to show better growth as the housing sector improves. In qualitative terms the Borough is well served with retail warehouses and this sector is not a priority for growth. However the Abbey Retail Park is in need of regeneration. Merrielands Crescent could also be redeveloped and modernised. Facilities within Whalebone Lane Retail Park and Merrielands Crescent should be consolidated and environmental improvements implemented.

10.49 The retail and leisure parks located at Merrielands, Dagenham is within an accessible location that could potential serve the needs of Barking Riverside and other parts of the Borough, in particular in could meet unmet need within the Dagenham Heathway area. The range of uses within this area could be broadened to provide a more integrated centre. Improving pedestrian connections between the retail park, Asda store and the leisure park would need to be implemented to create a more integrated centre.

**Review of Centre Boundaries and Frontages**

10.50 The Barking Town Centre Area Action Plan (February 2011) defines Primary and Secondary Shopping Frontages in Barking, and the Site Specific Allocations DPD (December 2010) defines Primary and Secondary Shopping Frontages in the smaller centres of Dagenham Heathway, Chadwell Heath and Green Lane. Barking Town Centre boundary is also defined, however there is no definition of Primary Shopping Area boundaries.

10.51 The Borough Wide Development Policies DPD (March 2011) seek to direct retail and other key town centre uses to town centres (policy BE2), and requires proposed retail development in edge or out of town centre sites to be considered against the sequential approach (policy BE3).

10.52 The policies also limit the proportion of non-Class A1 retail uses within the Primary and Secondary Shopping Frontages of Barking, Dagenham Heathway, Chadwell Heath and Green Lane and in the defined neighbourhood centres (policy BE1).

10.53 Emerging policies within the LBBD Local Plan should define Primary Shopping Areas and Town Centre Boundaries for Barking, Dagenham Heathway, Chadwell Heath and Green Lane, and centre boundaries for the neighbourhood centres. Emerging policies also need to distinguish between the Primary Shopping Area (PSA) and the Town Centre in terms of the location of different town centre uses, i.e. retail use should be directed to the PSA,
while other uses such as offices, hotels and leisure, would be appropriate within the wider town centre.

**Primary Shopping Areas and Centre Boundaries**

10.54 The designation of primary shopping areas (PSA) or centre boundaries is important when applying the sequential approach and directing town centre uses to appropriate locations. The NPPF suggests development plan should define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages.

10.55 The NPPF indicates that the first preference for retail uses should be the primary shopping area, which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the centre.

10.56 In Barking town centre the primary shopping area should be tightly drawn around the designated primary and secondary shopping frontages, and policies should make clear that the designated PSA is the appropriate and sequentially preferable location for retail development. The existing Barking town centre boundary includes adjoining areas that include leisure, business and other key town centre uses that extend beyond the main shopping areas. The existing town centre boundary is appropriately defined.

10.57 The district centres of Dagenham Heathway, Chadwell Heath and Green Lane are predominantly surrounded by residential uses and do not have significant adjoining areas with other main town centre uses that extend significantly beyond the primary shopping areas. In these centres, the town centre boundary should be tightly drawn around the commercial properties, i.e. those that are designated as retail frontages. Supporting text to new policies should make clear that designated shopping frontages in these centres constitute the town centre boundary.

10.58 Emerging policy should indicate that the first preference for the main town centre uses will be the Primary Shopping Areas (i.e. the combined primary and secondary frontages) within Barking town centre, and within the Primary Shopping Areas of Dagenham Heathway, Chadwell Heath and Green Lane district centres. Development outside of these areas will need to comply with the sequential approach and impact tests as set out in the NPPF.

10.59 It is appropriate to define boundaries for all the neighbourhood centres, as identified in the Site Specific Allocations DPD. These boundaries would define the extent of the local centre. Given the small scale of the centres, it would not be appropriate to define primary shopping areas.

10.60 It would be appropriate to amalgamate the designation of the neighbourhood centres of Merry Fiddlers, Whalebone Lane South and Althorne Way, together with the adjacent leisure development, in order to create a new district centre. These neighbourhood centres are all in close proximity, and combined have
around 70 commercial units. These commercial areas function as one rather than a number of separate smaller centres. The Morrison’s store provides an anchor to the area.

Primary and Secondary Shopping Frontages

10.61 Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development. The health checks for the four main centres has not identified any particular concentrations of vacant units, and there is no immediate need to relax shopping policies in order to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas. In addition there are vacant units within local centres within the Borough that can accommodate the emerging need for non-retail services.

10.62 Shopping frontage policies are required in LBBD to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity. However a ban on all changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. Particularly in secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres.

10.63 Furthermore the centre audits suggest there is a deficiency in Class A3 restaurant provision within the four main centres, and a relatively high provision of Class A2 services (including bookmakers/pawnbrokers etc.) and Class A5 takeaways compared with the national average. Careful consideration must be given to proposals for changes of use from Class A1 to other non-retail uses.

10.64 The designation of primary and secondary frontages remains an appropriate approach in Barking, Dagenham Heathway, Chadwell Heath and Green Lane. A clear policy should be considered relating to these frontages. The wording of this policy should provide sufficient flexibility to allow improvements to Class A3 restaurants in appropriate locations that do not impact on nearby residential uses. However a proliferation of non-retail uses could be harmful to the town centre’s vitality and viability.

10.65 Based on our experience across London, the typical maximum proportion of non-A1 use allowed within primary shopping frontages usually ranges from 20% to 30%. For secondary shopping frontages, the typical maximum proportion of non-A1 use allowed within secondary shopping frontages usually ranges from 50% to 70%. These proportions generally prevent clusters of non-retail use, whilst still maintaining some control on the overall predominance of Class A1 use within the secondary frontages as a whole.

10.66 The current policy for Barking town centre is a maximum of 15% of the measured primary shopping frontages and 30% of the measured secondary shopping frontages will be permitted for Class A2-A5 uses (policy BE1 of the
Borough Wide Development Policies DPD). The existing primary and secondary shopping frontages are tightly drawn in Barking town centre, with a more extensive “fringe” of unrestricted frontages surrounding the retail core, allowing for flexibility of uses within the town centre.

10.67 An analysis of the existing breakdown of uses within Barking’s primary shopping frontage suggests that the policy has been breached as 27% (or 37 units) of units are currently not within A1 uses within the defined primary frontage. Of these, 12 units are vacant, including 8 in Vicarage Field.

10.68 If these units remain vacant for a long period of time then it may be necessary to revisit the existing policy. Some relaxation may be appropriate if Class A3 restaurant or Class A4 restaurant/bar uses are proposed, rather than Class A5 takeaways and Class A2 uses. The qualitative analysis suggests this is an area of deficiency that could be addressed. However any change to the extent and/or policies relating to primary frontage cannot be considered fully until the implications of the Asda relocation from Vicarage Fields are understood.

10.69 The Council’s Hot Food Takeaway SPD includes a maximum 5% threshold within centres/frontages. The Goad national average for Class A5 uses is slightly higher at 5.8%. Furthermore, the 5% threshold has already been breached in the four main centres in LBBD, ranging from 7% to 12%. The SPD thresholds may need to be revisited.

10.70 The secondary policy frontage for Barking is appropriate.

10.71 In terms of the extent of the retail frontages in Barking town centre, we consider that these are appropriately drawn, and we suggest the following minor amendments:

- the primary shopping frontage should be extended to include the new London Road/North Street development.

10.72 For the district centres of Dagenham Heathway, Chadwell Heath and Green Lane, policy BE1 states that a maximum of 30% of the measured primary shopping frontages and 60% of the measured secondary shopping frontages will be permitted for A2-A5 uses. This policy is appropriate and allows sufficient flexibility in these centres to meet the floorspace projections in this study. The defined primary and secondary frontages appear to be appropriate.

10.73 The policy requirement for neighbourhood centres in policy BE1 that A2-A5 uses are restricted to a maximum of 35% in the measured frontages, which also appears to be appropriate.

**Scale of Retail Development**

10.74 Development should be appropriate in terms of scale and nature to the centre in which it is located.

10.75 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment
if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.

10.76 The CLG Practice Guidance states that it may occasionally be relevant to consider the impact of proposals below this threshold, for example if they are large compared to a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.

10.77 If the NPPF threshold was adopted, then a single development proposal could exceed the short to medium term floorspace projections for the Borough without the need for a retail impact assessment. Proposals that significantly exceed the floorspace projections for each centre will reduce the turnover of existing floorspace and this impact should be carefully tested on a case by case basis.

10.78 A 2,500 sq.m gross threshold is likely to be inappropriate as a blanket threshold within LBBD, as this scale of development would represent a significant proportion of the overall retail projections in the Borough. Development smaller than 2,500 sq.m gross could have a significant adverse impact, given that many of LBBD’s centres are not performing healthily. Accordingly, the following thresholds are recommended for all retail development outside the primary shopping area:

- 1,000 sq.m gross for Barking, Dagenham Heathway, Chadwell Heath and Green Lane; and
- 500 sq.m gross elsewhere.

10.79 A higher threshold is suggested for Barking as the main town centre in the Borough in terms of the amount of retail floorspace. For the other centres, proposals of 500 sq.m gross will be of greater significance and therefore should be subject to some form of impact assessment.

10.80 The Council should consider these recommended thresholds within a retail policy at the next stages of the Local Plan review as locally set thresholds for requiring impact assessments.

10.81 The sequential approach indicates that existing centres are the preferred location for new retail, leisure and other uses typically found in town centres. Some forms of development (up to 500 sq.m gross) may be more appropriate in smaller centres and local parades, if there are localised areas of deficiency. The key issues are the nature and scale of retail development proposed and the catchment area the development seeks to serve.

10.82 In general, development within local centres and parades should primarily serve the community within which it is located, and a catchment area of not more than 800 metres i.e. they should primarily serve walk-in catchment areas.

10.83 Based on the scale and role of centres within LBBD and the floorspace projections within this report, we believe the impact of smaller development proposals below the NPPF threshold could raise concerns.
Future Monitoring

Reflecting guidance set out in the NPPG, it will be important to monitor future change in the demand and supply of employment, retail and town centre space to identify changing patterns and inform any policy responses required. Specific items which it could be useful to monitor are listed below. It is understood that some of these are already monitored by LBBD and the GLA monitors many at a London-wide level.

a. levels of future demand for office/industrial space and which of the study’s estimates of future requirements this best relates to;

b. how much of the currently identified supply of employment space, retail and leisure commitments are likely to come forward and whether any new sites emerge;

c. the extent and type of any losses of existing employment land to non B uses, particularly residential, retail, waste management and religious meeting places;

d. any on-going deficiencies in provision for specific types of employment premises e.g. small, low cost, business or industrial units.

Town Centre Strategy Implementation and Monitoring

There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers;
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and town centre development up to 2017, with longer term forecast up to 2022, 2027 and 2032. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.
available. In particular, longer-term projections up to 2032 should be treated with caution.

10.87 It is recommended that the projection in this study should be updated in 4-5 years and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Venuescore, Retail Rankings); and
- implemented development within and around the study area.

10.88 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended.