

BEXLEY RETAIL & LEISURE STUDY: VOLUME 5 APPENDICES



London Borough of Bexley

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Signed:

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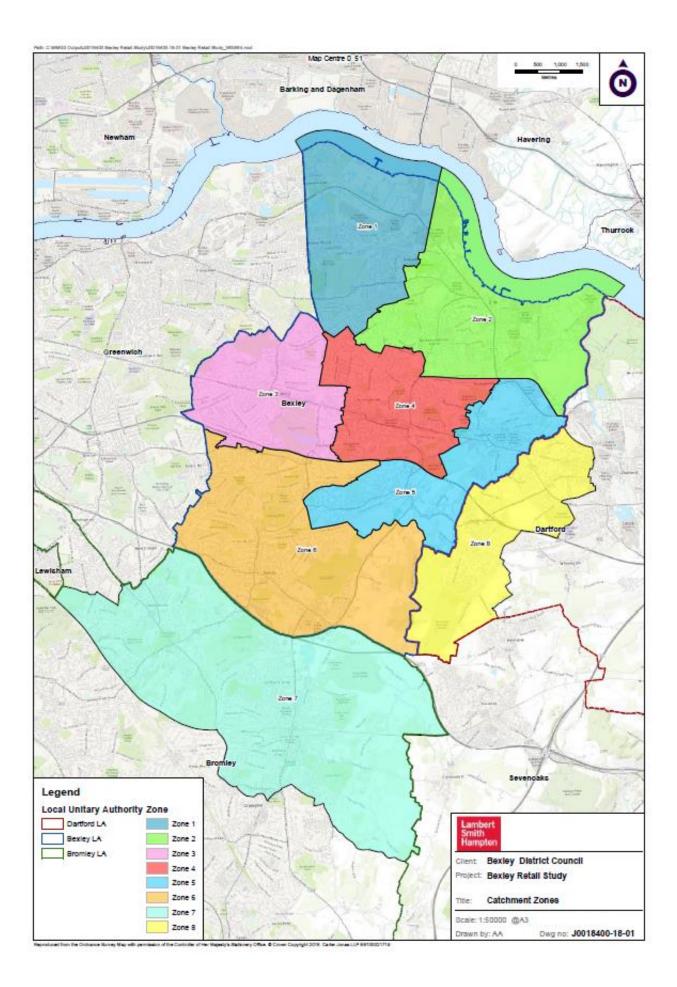
For and on behalf of Lambert Smith Hampton

VOLUME 5: APPENDICES

- A1: DEFINED CATCHMENT AREA & ZONES
- A2: MARKET SHARE ANALYSIS (%) CONVENIENCE GOODS (incl SFT)
- A3: MARKET SHARE ANALYSIS (%) COMPARISON GOODS (incl SFT)
- A4: POPULATION PROJECTIONS & EXPENDITURE GROWTH
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APPENDIX A1:

DEFINED CATCHMENT AREA & ZONES



APPENDIX A2: MARKET SHARE ANALYSIS (%) – CONVENIENCE GOODS (incl SFT)

TABLE 1: ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%) Including Internet Shopping and other Special Forms of Trading

Including Internet Shopping and other Special Forms of Trading										
ZONES	: 1	2	3	4	5	6		8	TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH AREA
										Zones 1 to 6
BEXLEYHEATH - STRATEGIC CENTRE										
Asda, The Broadway, Bexleyheath	7.1%	12.9%	12.1%	21.5%	4.5%	6.2%	0.0%	1.3%	8.2%	10.6%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	0.9%	0.3%	3.6%	0.7%	0.4%	0.2%	0.6%	0.7%
Marks & Spencer, Broadway, Bexleyheath	3.6%	2.4%	2.0% 3.3%	2.3% 3.4%	2.1% 1.2%	1.8%	0.0%	0.4% 0.3%	1.8% 2.3%	2.3%
Sainsbury's, Broadway, Bexleyheath Other stores in Bexleyheath	5.5% 0.0%	3.6% 1.0%	0.1%	0.8%	0.0%	1.3% 0.2%	0.0% 0.0%	0.3%	0.3%	0.4%
BEXLEYHEATH: SUB-TOTAL	16.2%	20.0%	18.6%	28.5%	11.3%	10.3%	0.0%	2.3%	13.3%	17.1%
CRAYFORD - MAJOR DISTRICT CENTRE	10.276	20.0%	10.0%	20.3%	11.5%	10.370	0.4%	2.3/0	13.370	17.176
Aldi Roman Way, Dartford	0.0%	3.4%	1.2%	5.8%	8.6%	0.8%	0.1%	4.8%	2.4%	2.8%
Iceland, Crayford Road, Crayford	0.0%	0.1%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.1%	0.2%
Sainsbury's, Stadium Way, Crayford	4.6%	10.5%	6.1%	13.6%	28.8%	2.3%	0.0%	18.4%	8.3%	9.3%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
CRAYFORD: SUB-TOTAL	4.6%	13.9%	7.2%	19.5%	38.7%	3.1%	0.1%	23.5%	10.9%	12.2%
ERITH - MAJOR DISTRICT CENTRE										
Farmfoods, Pier Road, Erith	0.2%	0.6%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Iceland, Town Square, Erith	0.0%	1.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Morrisons, James Watt Way, Erith	11.2%	28.3%	0.4%	7.8%	2.1%	0.0%	0.0%	1.9%	6.5%	8.4%
Local shops, Erith Town Centre	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
ERITH: SUB-TOTAL	11.6%	30.6%	0.4%	8.0%	2.1%	0.0%	0.0%	1.9%	6.9%	8.9%
SIDCUP - MAJOR DISTRICT CENTRE										
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.1%	0.0%	0.1%	0.1%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	3.6%	0.7%	6.0%	0.1%	0.0%	1.5%	2.0%
Morrisons, Jenner Close, Sidcup	0.0%	0.2%	0.3%	0.1%	0.9%	21.9%	2.1%	0.4%	4.5%	5.4%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.0%	0.2%	0.1%
SIDCUP: SUB-TOTAL	0.0%	0.2%	0.3%	3.7%	1.8%	28.8%	2.8%	0.4%	6.3%	7.6%
WELLING - MAJOR DISTRICT CENTRE										
Iceland, Welling High Street, Welling	0.2%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Lidl, Upper Wickham Lane, Welling	0.2%	0.1%	7.1%	0.1%	0.0%	0.0%	0.0%	0.2%	1.0%	1.3%
Morrisons, Welling High Street, Welling	1.2%	0.3%	15.0%	2.2%	0.1%	0.4%	0.0%	0.4%	2.6%	3.4%
Tesco Superstore, Welling High Street, Welling	0.9%	0.8%	15.2%	1.2%	1.2%	1.9%	0.4%	0.6%	3.0%	3.8%
Local shops, Welling Town Centre	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
WELLING: SUB-TOTAL	2.5%	1.2%	40.2%	3.5%	1.4%	2.3%	0.4%	1.2%	7.0%	9.0%
DISTRICT CENTRES:										
Belvedere (Nuxley Rd) (2)	11.5%	1.9%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	2.1%
Bexley Village (3)	0.0%	0.1%	0.5%	0.0%	2.5%	0.1%	0.0%	0.9%	0.4%	0.4%
Blackfen (4)	0.0%	0.0%	0.6%	0.0%	0.0%	6.8%	0.0%	0.0%	1.3%	1.7%
Northumberland Heath (5)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.01%	0.02%
DISTRICT CENTRES: SUB-TOTAL	11.5%	2.1%	1.2%	0.0%	2.5%	7.0%	0.0%	0.9%	3.3%	4.2%
NEIGHBOURHOOD CENTRES	1.3%	10.5%	15.8%	18.1%	11.8%	13.6%	5.8%	4.2%	10.4%	12.0%
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	15.3%	9.8%	0.5%	3.0%	0.5%	0.0%	0.0%	0.0%	3.6%	4.7%
Asda, Crook Log, Bexleyheath	1.2%	0.6%	3.1%	2.4%	3.6%	0.6%	0.0%	2.7%	1.5%	1.7%
Lidl, Eynsham Drive, Abbey Wood	3.2%	0.4%	0.0%	0.8%	0.0%	0.0%	0.1%	0.0%	0.5%	0.7%
Other	0.2%	0.1%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
OUT OF CENTRE: SUB-TOTAL	19.9%	10.8%	3.5%	8.5%	4.1%	0.6%	0.1%	2.7%	5.8%	7.4%
BEXLEY BOROUGH TOTAL RETENTION:	67.5%	89.4%	87.1%	89.7%	73.7%	65.6%	9.6%	37.2%	63.8%	78.5%
OUT OF BOROUGH:	0.000	0.001	0.001	0.000	0.071	10.000	10.5-1			
Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	0.9%	0.3%	8.9%	13.0%	10.8%	4.7%	5.4%	4.2%
Sainsbury's, Harow Mannor Way, Abbey Wood	8.9%	0.8%	0.8%	0.0%	0.0%	0.1%	0.0%	0.0%	1.2%	1.6%
Bromley	0.0%	0.0%	0.0%	0.3%	0.2%	0.2%	2.1%	0.0%	0.4%	0.1%
Dartford	0.0%	1.8%	0.1%	1.8%	1.3%	0.1%	0.5%	13.6%	1.6%	0.8%
Orpington	0.0%	0.0%	0.0%	0.0%	0.2%	1.4%	37.0%	0.2%	6.7%	0.4%
Thamesmead	19.7%	0.9%	4.2%	1.3%	2.2%	1.1%	0.0%	0.0%	3.4%	4.5%
Other	1.5%	2.5%	2.7%	2.6%	6.3%	12.4%	34.3%	39.7%	12.5%	5.1%
ALL CENTRES / STORES OUTSIDE BOROUGH:	30.2%	6.0%	8.6%	6.3%	19.1%	28.2%	84.7%	58.2%	31.2%	16.7%
INTERNET / SPECIAL FORMS OF TRADING	2.4%	4.7%	4.2%	4.0%	7.3%	6.1%	5.7%	4.6%	4.9%	4.8%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Household Telephone Survey (June 2018)

Note: (1) Market shares derived from responses to where people normally shop for main "bulk" and "top-up" food purchases, and where else they shop. Responses weighted by available expenditure in zones.

Note: (2) Belvedere's food and convenience offer mainly comprises of Co-op and Sainsbury's Local on Nuxley Rd, and other local convenience shops.

Note: (3) Bexley Village's food and conveneince offer mainly comprises of Costcutter and Nisa Local on the High St.

Note: (4) Blackfen's food and conveneince offer mainly comprises of Co-op off Westwood Lane and Tesco Express on Blackfen Road, and a mix of local independent and multiple convenience shops.

Note: (5) Northumberland Heath's food and conveneince offer mainly comprises of local independent shops.

TABLE 2: MAIN FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%) Including Internet Shopping and other Special Forms of Trading

A B	Including Internet Shopping and other Special Forms of Trading										
BACHWARDUU </th <th></th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th>6</th> <th>7</th> <th>8</th> <th></th> <th></th>		1	2	3	4	5	6	7	8		
nöh nörsky beisvisching15.37. <td>REYI FYHFATH - STRATECIC CENTRE</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Zones 1 to 6</td>	REYI FYHFATH - STRATECIC CENTRE										Zones 1 to 6
nindni		8 5%	14 7%	15 1%	25.9%	6.1%	8.2%	0.0%	1 9%	10.0%	13.0%
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mark promper provide production of the probability of											
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al denomyalignj. J.j. J.											
abially Carpoint <th< td=""><td></td><td>0.0%</td><td>2.5%</td><td>1.4%</td><td>7.3%</td><td>7.7%</td><td>0.0%</td><td>0.0%</td><td>5.7%</td><td>2.3%</td><td>2.6%</td></th<>		0.0%	2.5%	1.4%	7.3%	7.7%	0.0%	0.0%	5.7%	2.3%	2.6%
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dension of the second											
CONTROL SUBTORA15.815.816.964.3864.380.940.940.940.940.940.940.940.950											
NTH - Model District CENTRE UNIT OPE											
amode State State StateConstructionOne<											
eised, Sense, Erith0.0%	Farmfoods, Pier Road, Erith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
iore box cost shops, barrier15.5% 0.0%0.0% <td>Iceland, Town Square, Erith</td> <td></td>	Iceland, Town Square, Erith										
cal Jops, tith Town Centre0,0% </td <td>Morrisons, James Watt Way, Erith</td> <td></td>	Morrisons, James Watt Way, Erith										
Inth Sub-Crypt15.5836.580.07 <t< td=""><td>Local shops, Erith Town Centre</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Local shops, Erith Town Centre										
DCUP - MADOR DISTRICT CENTRE			36.5%	0.0%	10.2%	2.1%	0.0%		1.9%	8.4%	10.9%
celand, kither Hijn Street, Skicup0.0% <t< td=""><td>SIDCUP - MAJOR DISTRICT CENTRE</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	SIDCUP - MAJOR DISTRICT CENTRE										
nthis norman, signifyeres, Skikup0.0%0.0%0.0%0.0%0.6%0.0% <td>Iceland, Sidcup High Street, Sidcup</td> <td>0.0%</td>	Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
bornism, jermer Cose, Sickup Town Centre 0.0% <td>Little Waitrose, High Street, Sidcup</td> <td>0.0%</td> <td>0.0%</td> <td>0.0%</td> <td>3.6%</td> <td>0.8%</td> <td>5.3%</td> <td>0.0%</td> <td>0.0%</td> <td>1.4%</td> <td>1.8%</td>	Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	3.6%	0.8%	5.3%	0.0%	0.0%	1.4%	1.8%
coal shops. Sideup Foun Centre0.0%0.	Morrisons, Jenner Close, Sidcup										
ISIDUP SUB-TOTAL 0.0% 0.4% 0.4% 1.5% 1.5% 1.5% 0.0% 6.7% 8.1% VELING - MADOR DISTING CENTRE <											
celand, Welling High Street, Welling0.0%					3.6%	1.5%	31.5%	3.0%			
idi, Upper Wichham Lane, Weiling 0.0% <td>WELLING - MAJOR DISTRICT CENTRE</td> <td></td>	WELLING - MAJOR DISTRICT CENTRE										
idi, Upper Wichham Lane, Weiling 0.0% <td>Iceland, Welling High Street, Welling</td> <td>0.0%</td> <td>0.0%</td> <td>1.6%</td> <td>0.0%</td> <td>0.0%</td> <td>0.0%</td> <td>0.0%</td> <td>0.0%</td> <td>0.2%</td> <td>0.3%</td>	Iceland, Welling High Street, Welling	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
esc superstore, Welling High Street, Welling 0.8% 0.8% 0.7%	Lidl, Upper Wickham Lane, Welling	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.3%
esc superstore, Welling High Street, Welling 0.8% 0.8% 0.7%	Morrisons, Welling High Street, Welling	1.4%	0.4%	16.8%	3.5%	0.0%	0.0%	0.0%	0.7%	2.9%	3.8%
acał shops, Welling Town Centre0.0%0		0.8%	0.8%	17.2%	1.0%	0.7%	2.2%	0.6%	0.7%	3.3%	4.1%
WELLING: SUB-TOTAL2.3%1.2%3.0%4.6%0.7%2.2%0.6%1.4%7.5%9.6%NSTRCT CENTRES: <td>Local shops, Welling Town Centre</td> <td>0.0%</td>	Local shops, Welling Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
evedere 5.3% 0.4% 0.0%		2.3%	1.2%	43.0%	4.6%	0.7%	2.2%	0.6%	1.4%	7.5%	9.6%
exiey 0.0%	DISTRICT CENTRES:										
lackfen0.0% <th< td=""><td>Belvedere</td><td>5.3%</td><td>0.4%</td><td>0.0%</td><td>0.0%</td><td>0.0%</td><td>0.0%</td><td>0.0%</td><td>0.0%</td><td>0.7%</td><td>0.9%</td></th<>	Belvedere	5.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
bit 0.% 0.% 0.0% 0.	Bexley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISTRICT CENTRES: SUB-TOTAL 5.3% 0.4% 0.0% 0.0% 2.4% 0.0% 0.0% 1.1% 1.4% HEGHBOURHOOD CENTRES 0.0% 2.7% 11.3% 5.1% 5.6% 4.3% 4.9% 0.7% 4.6% 4.9% VID OF CENTRE 5.6% 0.4% 3.6% 0.8% 0.0% 0.0% 3.9% 5.2% sda, Picardy Manor Way, Station Road, Belvedere 17.6% 9.9% 0.4% 3.6% 0.8% 0.0% 0.0% 4.4% 1.0% 0.9% sda, Crook Log, Bexleyheath 1.7% 0.0% 0.0% 0.6% 0.0%<	Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.4%	0.6%
LEIGHBOURHOOD CENTRES 0.0% 2.7% 11.3% 5.1% 5.6% 4.3% 4.9% 0.7% 4.6% 4.9% DUT OF CENTRE sda, Picardy Manor Way, Station Road, Belvedere 17.6% 9.9% 0.4% 3.6% 0.0% 0.0% 3.9% 5.2% sda, Picardy Manor Way, Station Road, Belvedere 17.6% 0.0% 0.0% 0.0% 4.4% 1.0% 0.9% sda, Crook Log, Bexley/heath 1.7% 0.0% 0.6% 0.0% 0.0% 0.0% 0.0% 0.0% 0.9% 0.4% 0.0% 0	Northumberland Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%
Control Centre Single Sin	DISTRICT CENTRES: SUB-TOTAL	5.3%	0.4%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	1.1%	1.4%
sda, Picardy Manor Way, Station Road, Belvedere 17.6% 9.9% 0.4% 3.6% 0.0% 0.0% 0.0% 3.9% 5.2% sda, Crook Log, Bexleyheath 1.7% 0.0% 0.0% 1.6% 3.4% 0.4% 0.0%	NEIGHBOURHOOD CENTRES	0.0%	2.7%	11.3%	5.1%	5.6%	4.3%	4.9%	0.7%	4.6%	4.9%
sda, Picardy Manor Way, Station Road, Belvedere 17.6% 9.9% 0.4% 3.6% 0.0% 0.0% 0.0% 3.9% 5.2% sda, Crook Log, Bexleyheath 1.7% 0.0% 0.0% 1.6% 3.4% 0.4% 0.0%	OUT OF CENTRE										
Back of Markon Manner Way, Balance Serverse 1.7% 0.0% 0.0% 1.6% 3.4% 0.4% 0.0%		17.6%	9.9%	0.4%	3.6%	0.8%	0.0%	0.0%	0.0%	3.9%	5.2%
idl, Eynsham Drive, Abbey Wood 1.5% 0.4% 0.0% 0.6% 0.0%	Asda, Crook Log, Bexleyheath										
Duther 0.0%	Lidl, Eynsham Drive, Abbey Wood										
OUT OF CENTRE: SUB-TOTAL 20.8% 10.3% 0.4% 9.5% 4.3% 0.4% 0.0% 4.4% 5.6% 7.0% EXLEY BOROUGH TOTAL RETENTION: 64.8% 89.0% 84.9% 87.8% 71.7% 55.2% 9.2% 39.4% 61.1% 74.7% esco Superstore, Edgington Way, Foots Cray 0.0% 0.0% 0.7% 0.5% 11.0% 19.2% 14.8% 6.1% 7.5% 5.9% ainsbury's, Harow Mannor Way, Abbey Wood 8.0% 1.3% 0.8% 0.0%	Other										
EXLEY BOROUGH TOTAL RETENTION: 64.8% 89.0% 84.9% 87.8% 71.7% 55.2% 9.2% 39.4% 61.1% 74.7% escs Superstore, Edgington Way, Foots Cray 0.0% 0.0% 0.7% 0.5% 11.0% 19.2% 14.8% 6.1% 7.5% 5.9% ainsbury's, Harow Mannor Way, Abbey Wood 8.0% 1.3% 0.8% 0.0%<											
esco Superstore, Edgington Way, Foots Cray 0.0% 0.0% 0.7% 0.5% 11.0% 19.2% 14.8% 6.1% 7.5% 5.9% ainsbury's, Harow Mannor Way, Abbey Wood 8.0% 1.3% 0.8% 0.0% <td< td=""><td>BEXLEY BOROUGH TOTAL RETENTION:</td><td>64.8%</td><td>89.0%</td><td>84.9%</td><td>87.8%</td><td>71.7%</td><td>55.2%</td><td>9.2%</td><td>39.4%</td><td>61.1%</td><td>74.7%</td></td<>	BEXLEY BOROUGH TOTAL RETENTION:	64.8%	89.0%	84.9%	87.8%	71.7%	55.2%	9.2%	39.4%	61.1%	74.7%
ainsbury's, Harow Mannor Way, Abbey Wood 8.0% 1.3% 0.8% 0.0% <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>											
ainsbury's, Harow Mannor Way, Abbey Wood 8.0% 1.3% 0.8% 0.0% <td< td=""><td>Tesco Superstore, Edgington Way, Foots Crav</td><td>0.0%</td><td>0.0%</td><td>0.7%</td><td>0.5%</td><td>11.0%</td><td>19.2%</td><td>14.8%</td><td>6.1%</td><td>7.5%</td><td>5.9%</td></td<>	Tesco Superstore, Edgington Way, Foots Crav	0.0%	0.0%	0.7%	0.5%	11.0%	19.2%	14.8%	6.1%	7.5%	5.9%
nonley 0.0% 0.0% 0.0% 0.0% 0.4% 3.0% 0.0% 0.6% 0.1% hartford 0.0% 1.8% 0.0% 2.5% 0.8% 0.0% 0.0% 11.6% 1.4% 0.8% hypington 0.0% 0.0% 0.0% 0.0% 0.0% 1.9% 45.8% 0.0% 8.2% 0.4% hamesmead 22.6% 0.8% 5.6% 1.4% 3.4% 1.6% 0.0% 4.2% 5.5% ther 1.6% 0.9% 1.2% 2.3% 13.0% 18.7% 35.2% 8.8% 4.2% LLCENTRES / STORES OUTSIDE BOROUGH: 32.2% 4.8% 6.3% 17.5% 36.0% 82.3% 52.9% 31.7% 18.4%											
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NTERNET / SPECIAL FORMS OF TRADING 3.0% 6.2% 6.7% 5.9% 10.7% 8.7% 8.5% 7.7% 7.2% 6.9%											
OTAL MARKET SHARE: 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0%											
	TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: OTHER ('SECONDARY') MAIN FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%) Including Internet Shopping and other Special Forms of Trading

									TOTAL CATCUMENT	BEXLEY BOROUGH
	1	2	3	4	5	6	7	8	TOTAL CATCHMENT (STUDY) AREA	AREA Zones 1 to 6
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	6.6%	18.3%	11.2%	24.5%	1.9%	4.6%	0.0%	1.2%	8.6%	11.2%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.6%	1.4%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	11.9%	0.6%	0.0%	1.1%	1.1%	1.4%
Marks & Spencer, Broadway, Bexleyheath	4.4%	5.3%	3.4%	10.6%	1.8%	3.7%	0.0%	0.0%	3.7%	4.8%
Sainsbury's, Broadway, Bexleyheath	5.6%	1.8%	5.3%	1.3%	1.0%	1.6%	0.0%	1.1%	2.2%	2.8%
Other stores in Bexleyheath	0.0%	0.0%	0.0%	0.7%	0.0%	0.5%	0.0%	0.0%	0.2%	0.2%
BEXLEYHEATH: SUB-TOTAL	16.5%	25.4%	20.4%	38.5%	16.6%	11.0%	0.0%	3.4%	16.0%	20.7%
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	0.0%	4.5%	1.3%	5.7%	14.0%	4.0%	0.8%	9.0%	4.0%	4.3%
Iceland, Crayford Road, Crayford	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Sainsbury's, Stadium Way, Crayford	7.2%	3.8%	2.4%	9.2%	18.1%	3.8%	0.0%	23.1%	6.3%	6.3%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CRAYFORD: SUB-TOTAL	7.2%	8.9%	3.7%	15.0%	32.0%	7.8%	0.8%	32.1%	10.5%	10.8%
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	1.3%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Iceland, Town Square, Erith	0.0%	6.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.9%	1.2%
Morrisons, James Watt Way, Erith	7.4%	22.2%	0.6%	5.9%	5.5%	0.0%	0.0%	2.3%	5.3%	6.8%
Local shops, Erith Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ERITH: SUB-TOTAL	8.7%	28.2%	0.6%	7.2%	5.5%	0.0%	0.0%	2.3%	6.5%	8.3%
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.3%	0.3%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	4.5%	0.9%	4.1%	0.9%	0.0%	1.4%	1.7%
Morrisons, Jenner Close, Sidcup	0.0%	0.7%	0.0%	0.6%	1.1%	16.7%	0.9%	2.9%	3.6%	4.3%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.5%	0.0%
SIDCUP: SUB-TOTAL	0.0%	0.7%	0.0%	5.2%	2.9%	21.9%	4.7%	2.9%	5.8%	6.3%
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	1.2%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
Lidl, Upper Wickham Lane, Welling	0.0%	0.6%	9.9%	0.6%	0.0%	0.0%	0.0%	1.2%	1.6%	2.0%
Morrisons, Welling High Street, Welling	1.2%	0.0%	12.3%	0.7%	0.9%	2.2%	0.0%	0.0%	2.4%	3.1%
Tesco Superstore, Welling High Street, Welling	0.0%	1.3%	12.2%	1.3%	3.5%	3.9%	0.0%	0.0%	3.0%	3.9%
Local shops, Welling Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WELLING: SUB-TOTAL	2.4%	1.9%	38.4%	2.7%	4.4%	6.2%	0.0%	1.2%	7.7%	10.0%
DISTRICT CENTRES:										
Belvedere	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
Bexley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.1%	0.0%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.5%	0.6%
Northumberland Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%
DISTRICT CENTRES: SUB-TOTAL	5.1%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	1.3%	1.1%	1.4%
NEIGHBOURHOOD CENTRES	1.2%	8.5%	7.4%	11.5%	4.3%	20.4%	8.6%	7.9%	9.6%	10.0%
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	15.0%	14.0%	1.3%	3.9%	0.0%	0.0%	0.0%	0.0%	4.3%	5.7%
Asda, Crook Log, Bexleyheath	0.0%	0.0%	13.2%	3.8%	0.0%	1.1%	0.0%	0.0%	2.4%	3.2%
Lidl, Eynsham Drive, Abbey Wood	7.6%	0.0%	0.0%	3.1%	0.0%	0.0%	0.8%	0.0%	1.3%	1.6%
Other	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
OUT OF CENTRE: SUB-TOTAL	22.6%	14.6%	14.4%	10.9%	0.0%	1.1%	0.8%	0.0%	8.1%	10.5%
BEXLEY BOROUGH TOTAL RETENTION:	63.6%	88.4%	85.1%	91.0%	65.8%	71.0%	14.9%	51.1%	65.3%	78.0%
Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	3.1%	0.0%	15.4%	5.8%	7.9%	0.0%	4.1%	3.6%
Sainsbury's, Harow Mannor Way, Abbey Wood	14.2%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	2.4%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dartford	0.0%	1.2%	0.0%	0.0%	1.0%	0.6%	0.0%	16.0%	1.4%	0.5%
Orpington	0.0%	0.0%	0.0%	0.0%	1.1%	0.6%	21.7%	1.2%	4.0%	0.2%
Thamesmead	21.0%	2.0%	4.7%	0.7%	1.1%	0.5%	0.0%	0.0%	3.5%	4.7%
Other	0.0%	4.1%	4.1%	5.9%	10.3%	16.8%	53.1%	31.7%	16.9%	7.4%
ALL CENTRES / STORES OUTSIDE BOROUGH:	35.2%	7.3%	13.7%	6.5%	28.7%	24.2%	82.6%	48.9%	31.8%	18.8%
INTERNET / SPECIAL FORMS OF TRADING	1.2%	4.3%	1.2%	2.5%	5.5%	4.8%	2.5%	0.0%	2.9%	3.3%

TABLE 4: TOP UP FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%) Including Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH AREA Zones 1 to 6
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	3.5%	7.4%	2.2%	10.2%	1.1%	4.1%	0.0%	0.0%	3.7%	4.8%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.1%	0.2%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.1%	0.2%
Marks & Spencer, Broadway, Bexleyheath	3.2%	5.9%	3.4%	1.6%	1.0%	4.1%	0.0%	0.0%	2.6%	3.5%
Sainsbury's, Broadway, Bexleyheath	8.6%	1.7%	1.2%	1.9%	1.0%	0.6%	0.0%	1.0%	1.8%	2.3%
Other stores in Bexleyheath	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	1.0%	0.1%	0.1%
BEXLEYHEATH: SUB-TOTAL	15.3%	14.9%	6.8%	14.2%	3.0%	10.0%	0.0%	2.1%	8.5%	11.0%
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	0.0%	3.7%	0.6%	3.0%	6.8%	0.0%	0.0%	0.0%	1.5%	2.0%
Iceland, Crayford Road, Crayford	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.3%	0.4%
Sainsbury's, Stadium Way, Crayford	0.0%	5.4%	1.2%	3.0%	21.1%	0.6%	0.0%	8.4%	3.6%	4.0%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CRAYFORD: SUB-TOTAL	0.0%	9.1%	1.8%	6.0%	31.1%	0.6%	0.0%	8.4%	5.4%	6.4%
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Town Square, Erith	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.5%
Morrisons, James Watt Way, Erith	4.2%	8.6%	2.1%	4.2%	0.0%	0.0%	0.0%	0.0%	2.4%	3.2%
Local shops, Erith Town Centre	1.1%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%
ERITH: SUB-TOTAL	5.3%	12.9%	2.1%	4.2%	0.0%	0.0%	0.0%	0.0%	3.2%	4.2%
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.1%	0.1%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	4.8%	1.0%	10.8%	0.0%	0.0%	2.5%	3.3%
Morrisons, Jenner Close, Sidcup	0.0%	0.0%	0.0%	0.0%	1.0%	12.5%	0.0%	0.0%	2.3%	3.0%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.4%	0.5%
SIDCUP: SUB-TOTAL	0.0%	0.0%	0.0%	4.8%	2.0%	26.2%	0.0%	0.0%	5.4%	7.0%
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Upper Wickham Lane, Welling	1.2%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.2%
Morrisons, Welling High Street, Welling	1.1%	0.6%	13.6%	0.0%	0.0%	0.7%	0.0%	0.0%	2.2%	2.9%
Tesco Superstore, Welling High Street, Welling	0.0%	0.6%	10.2%	2.3%	1.9%	0.0%	0.0%	1.1%	2.0%	2.5%
Local shops, Welling Town Centre	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
WELLING: SUB-TOTAL	2.3%	1.1%	33.7%	2.3%	1.9%	0.7%	0.0%	1.1%	5.6%	7.3%
DISTRICT CENTRES:										
Belvedere	31.7%	4.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	5.6%
Bexley	0.0%	0.5%	0.0%	0.0%	12.9%	0.0%	0.0%	4.7%	1.4%	1.5%
Blackfen	0.0%	0.0%	3.5%	0.0%	0.0%	17.5%	0.0%	0.0%	3.6%	4.8%
Northumberland Heath	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.08%	0.11%
DISTRICT CENTRES: SUB-TOTAL	31.7%	5.4%	4.1%	0.0%	12.9%	17.5%	0.0%	4.7%	9.4%	12.0%
	5.6%	34.3%	42.9%	52.7%	30.2%	34.7%	2.8%	1.0%	26.3%	33.8%
	12.00/	11 40/	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	2.2%	4.29/
Asda, Picardy Manor Way, Station Road, Belvedere	13.8% 0.0%	11.4% 4.1%	0.0%	0.7% 5.8%	0.0%	0.0%	0.0%	0.0%	3.3% 2.0%	4.3% 2.7%
Asda, Crook Log, Bexleyheath		4.1% 0.0%	3.1% 0.0%	5.8% 0.0%	4.7% 0.0%	0.0%	0.0%	0.0%	0.4%	0.5%
Lidl, Eynsham Drive, Abbey Wood Other	3.2% 1.2%	0.0%	0.0%	0.0%	0.0%	0.0% 0.0%	0.0% 0.0%	0.0% 0.0%	0.4%	0.5%
OUT OF CENTRE: SUB-TOTAL	1.2% 18.2%	0.0% 15.5%	0.0% 3.1%	6.5%	0.0%	0.0%	0.0%	0.0%	0.1% 5.8%	0.2% 7.6%
BEXLEY BOROUGH TOTAL RETENTION:	78.4%	93.3%	94.5%	90.6%	4.7%	89.6%	2.8%	17.3%	69.6%	89.3%
			/6		//					
Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	4.5%	6.8%	1.4%	0.3%
Sainsbury's, Harow Mannor Way, Abbey Wood	10.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	1.2%	1.6%
Bromley	0.0%	0.0%	0.0%	2.3%	1.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Dartford	0.0%	2.0%	0.0%	2.3%	1.0%	0.0%	0.0%	16.3%	1.7%	0.4%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	20.7%	0.0%	3.7%	0.1%
Thamesmead	7.9%	0.0%	0.6%	0.6%	0.0%	0.0%	0.0%	0.0%	1.0%	1.4%
Other	2.4%	2.6%	5.0%	3.5%	12.0%	6.6%	71.3%	59.5%	20.1%	5.1%
ALL CENTRES / STORES OUTSIDE BOROUGH:	20.3%	4.7%	5.5%	8.7%	14.0%	9.1%	96.4%	82.7%	29.6%	9.8%
INTERNET / SPECIAL FORMS OF TRADING	1.2%	2.0%	0.0%	0.6%	0.0%	1.2%	0.8%	0.0%	0.9%	0.9%

TABLE 5: OTHER TOP UP FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%) Including Internet Shopping and other Special Forms of Trading

	1	2	3	4	5	6	7	8	TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH AREA Zones 1 to 6
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	4.4%	2.8%	10.0%	7.0%	4.0%	0.0%	0.0%	0.0%	3.3%	4.4%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	8.8%	0.0%	1.9%	0.0%	0.0%	0.0%	1.4%	1.8%
Marks & Spencer, Broadway, Bexleyheath	7.1%	5.2%	2.7%	1.8%	7.8%	0.0%	0.0%	0.0%	2.7%	3.6%
Sainsbury's, Broadway, Bexleyheath	6.5%	7.6%	1.2%	1.8%	0.0%	0.0%	0.0%	0.0%	2.2%	2.9%
Other stores in Bexleyheath	0.0%	1.2%	1.4%	6.3%	0.0%	1.5%	0.0%	0.0%	1.3%	1.7%
BEXLEYHEATH: SUB-TOTAL	18.0%	16.8%	24.2%	16.8%	13.6%	1.5%	0.0%	0.0%	10.9%	14.4%
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	0.0%	6.2%	0.0%	1.6%	8.5%	1.5%	0.0%	0.0%	2.0%	2.7%
Iceland, Crayford Road, Crayford	0.0%	0.0%	0.0%	0.0%	8.7%	0.0%	0.0%	0.0%	0.7%	0.9%
Sainsbury's, Stadium Way, Crayford	4.8%	1.2%	6.0%	21.3%	0.0%	0.0%	0.0%	0.0%	3.8%	5.0%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.3%	0.0%
CRAYFORD: SUB-TOTAL	4.8%	7.4%	6.0%	22.9%	17.2%	1.5%	0.0%	3.8%	6.8%	8.6%
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.2%
Iceland, Town Square, Erith	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Morrisons, James Watt Way, Erith	2.1%	17.9%	0.0%	1.9%	0.0%	0.0%	0.0%	3.8%	3.3%	4.0%
Local shops, Erith Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ERITH: SUB-TOTAL	2.1%	25.4%	0.0%	1.9%	0.0%	0.0%	0.0%	3.8%	4.4%	5.4%
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.4%	0.0%	0.5%	0.3%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	1.1%	1.5%
Morrisons, Jenner Close, Sidcup	0.0%	1.3%	0.0%	0.0%	1.7%	18.4%	1.6%	0.0%	3.9%	4.8%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.2%	0.3%
SIDCUP: SUB-TOTAL	0.0%	1.3%	0.0%	0.0%	1.7%	27.1%	3.0%	0.0%	5.7%	6.8%
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%
Lidl, Upper Wickham Lane, Welling	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.5%
Morrisons, Welling High Street, Welling	0.0%	0.0%	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	1.8%
Tesco Superstore, Welling High Street, Welling	4.2%	0.0%	15.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	3.4%
Local shops, Welling Town Centre	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%
WELLING: SUB-TOTAL	4.2%	0.0%	36.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	7.1%
DISTRICT CENTRES:	27.8%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	C 11/
Belvedere					0.0%	0.0%	0.0%		4.6%	6.1%
Bexley	0.0%	0.0%	4.8%	0.0%	5.4%	1.3%	0.0%	0.0%	1.3%	1.7%
Blackfen Northumberland Heath	0.0% 0.0%	0.0% 0.0%	1.2% 0.0%	0.0% 0.0%	0.0% 0.0%	23.4% 0.0%	0.0% 0.0%	0.0% 0.0%	4.4% 0.00%	5.7% 0.00%
DISTRICT CENTRES: SUB-TOTAL	27.8%	10.3%	6.0%	0.0%	5.4%	24.6%	0.0%	0.0%	10.3%	13.5%
NEIGHBOURHOOD CENTRES	27.8%	24.4%	14.3%	53.9%	31.9%	27.7%	11.1%	25.0%	22.6%	25.0%
OUT OF CENTRE	2.3%	24.470	14.370	33.570	31.570	27.770	11.1/0	23.070	22.070	25.070
Asda, Picardy Manor Way, Station Road, Belvedere	4.6%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
Asda, Crook Log, Bexleyheath	2.1%	0.0%	6.1%	0.0%	8.7%	1.5%	0.0%	0.0%	2.1%	2.7%
Lidl, Eynsham Drive, Abbey Wood	6.5%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.2%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE: SUB-TOTAL	13.3%	1.2%	6.1%	1.8%	8.7%	1.5%	0.0%	0.0%	3.7%	4.8%
BEXLEY BOROUGH TOTAL RETENTION:	72.5%	86.9%	92.7%	97.3%	78.6%	83.9%	14.0%	32.5%	69.8%	85.7%
Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.7%	0.9%
Sainsbury's, Harow Mannor Way, Abbey Wood	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.5%	0.0%
Dartford	0.0%	2.0%	1.3%	0.0%	5.3%	0.0%	5.3%	18.3%	3.0%	1.2%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	32.2%	0.0%	5.8%	0.3%
Thamesmead	18.2%	1.3%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	2.5%	3.3%
Other	2.5%	9.7%	6.0%	0.0%	16.1%	10.8%	44.1%	49.2%	16.6%	7.6%
ALL CENTRES / STORES OUTSIDE BOROUGH:	25.3%	13.1%	7.3%	2.7%	21.4%	16.1%	84.6%	67.5%	29.8%	14.0%
INTERNET / SPECIAL FORMS OF TRADING	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.5%	0.3%

APPENDIX A3: MARKET SHARE ANALYSIS (%) – COMPARISON GOODS (incl SFT)

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)

	ZONE:		2	3	4		6		8	CATCHMENT (STUDY) AREA	BEXLEY BOROUG
										(STUDT) AREA	Zones 1-6
Bexleyheath Strategic Centre		32.1%	28.9%	28.1%	36.8%	14.4%	16.0%	0.8%	4.0%	19.6%	25.5%
Crayford Major Town Centre		2.2%	5.9%	2.0%	3.5%	14.5%	2.7%	0.0%	6.7%	3.9%	4.5%
Erith Major Town Centre		1.8%	6.4%	0.0%	1.2%	0.1%	0.1%	0.0%	0.2%	1.2%	1.6%
Sidcup Major Town Centre		0.0%	0.1%	0.5%	0.1%	0.6%	11.0%	0.6%	0.8%	2.4%	2.9%
Welling Major Town Centre		0.9%	0.4%	8.6%	0.5%	0.3%	0.5%	0.1%	0.6%	1.6%	2.0%
DISTRICT CENTRES:											
Belvedere (Nuxley Road)		5.5%	1.0%	0.0%	1.3%	0.1%	0.0%	0.0%	0.0%	0.8%	1.1%
Bexley Village		0.4%	0.0%	0.0%	0.0%	1.1%	0.1%	0.0%	0.7%	0.2%	0.2%
Blackfen		0.0%	0.0%	0.1%	0.0%	0.0%	1.5%	0.0%	0.0%	0.3%	0.4%
Northumberland Heath		0.3%	2.1%	0.1%	0.3%	0.0%	0.0%	0.0%	0.1%	0.4%	0.5%
NEIGHBOURHOOD CENTRES:		0.2%	0.1%	0.1%	1.1%	0.2%	0.1%	0.0%	0.4%	0.2%	0.3%
OUT OF CENTRE:											
Crittals Corner Retail Park		0.6%	0.1%	1.0%	0.3%	1.6%	3.7%	1.8%	0.6%	1.4%	1.4%
Madford Retail Park		0.4%	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tower Retail Park		4.5%	5.6%	5.3%	5.7%	9.1%	1.8%	0.1%	7.8%	4.2%	4.9%
All Other Out of Centre in the Borough		5.2%	6.2%	2.2%	3.7%	0.2%	0.1%	0.0%	0.1%	2.1%	2.8%
OUT OF CENTRE: SUB-TOTAL		10.7%	11.9%	8.5%	9.9%	10.9%	5.5%	1.9%	8.5%	7.8%	9.1%
BEXLEY BOROUGH RETENTION LEVEL:		54.0%	56.9%	48.0%	54.8%	42.2%	37.5%	3.5%	22.0%	38.3%	48.1%
OUTSIDE OF BOROUGH:											
Bluewater		11.9%	15.0%	21.9%	16.3%	26.5%	22.5%	8.2%	28.5%	17.9%	19.2%
Bromley		0.4%	0.3%	0.2%	0.4%	0.2%	3.2%	16.8%	0.4%	3.8%	1.0%
Dartford		2.2%	3.6%	1.1%	1.7%	6.9%	1.3%	0.3%	22.6%	3.5%	2.5%
Orpington		0.6%	0.7%	2.2%	1.0%	2.8%	8.3%	36.8%	1.5%	9.0%	3.1%
Thamesmead		6.0%	0.5%	1.2%	0.3%	0.0%	0.2%	0.0%	0.0%	0.9%	1.2%
Westfield Stratford		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
Dther		7.6%	4.4%	6.3%	4.0%	3.7%	9.0%	11.2%	5.7%	7.0%	6.2%
OUTSIDE OF BOROUGH:		28.7%	24.5%	32.8%	23.7%	40.1%	44.6%	73.3%	58.6%	42.1%	33.2%
NTERNET:		17.3%	18.6%	19.2%	21.5%	17.6%	17.9%	23.2%	19.4%	19.5%	18.7%
TOTAL MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: CLOTHING & FOOTWEAR - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:		2	3	4		6		8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	47.7%	47.7%	40.0%	49.1%	25.9%	22.2%	2.2%	5.2%	29.4%	38.1%
Crayford Major Town Centre	0.0%	0.4%	0.0%	3.0%	4.1%	3.3%	0.0%	1.3%	1.4%	1.7%
Erith Major Town Centre	0.8%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
Sidcup Major Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.7%	1.0%
Welling Major Town Centre	0.8%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	3.3%	0.4%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.1%	0.2%
Northumberland Heath	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.8%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Tower Retail Park	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.6%	0.1%	0.1%
All Other Out of Centre in the Borough	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
OUT OF CENTRE: SUB-TOTAL	2.3%	0.0%	0.0%	0.6%	0.8%	0.0%	0.0%	0.6%	0.4%	0.5%
BEXLEY BOROUGH RETENTION LEVEL:	54.8%	53.1%	41.6%	56.3%	30.8%	30.2%	2.2%	7.8%	33.9%	43.9%
OUTSIDE OF BOROUGH:										
Bluewater	20.2%	28.7%	42.1%	30.9%	51.7%	38.1%	17.4%	54.4%	32.9%	34.9%
Bromley	0.0%	0.8%	0.0%	0.0%	0.0%	7.8%	31.9%	0.6%	7.4%	2.0%
Dartford	1.5%	1.9%	0.0%	0.5%	3.0%	0.4%	0.6%	11.1%	1.6%	1.1%
Orpington	0.0%	0.0%	0.0%	0.5%	0.0%	1.7%	11.9%	0.0%	2.5%	0.5%
Thamesmead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	4.1%	4.9%	1.6%	0.6%	0.0%	7.9%	14.7%	6.0%	5.9%	3.8%
OUTSIDE OF BOROUGH:	25.8%	36.3%	43.7%	32.5%	54.7%	55.8%	76.4%	72.1%	50.4%	42.2%
INTERNET:	19.4%	10.6%	14.6%	11.1%	14.5%	13.9%	21.4%	20.1%	15.7%	13.9%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: RECORDING MEDIA- 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

incluaing internet snopping and other special Forms of Trading ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	31.9%	23.4%	6.5%	25.4%	0.0%	13.0%	0.0%	1.3%	11.8%	16.1%
Crayford Major Town Centre	4.3%	0.7%	0.9%	0.8%	6.0%	0.0%	0.0%	2.6%	1.5%	1.7%
Erith Major Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sidcup Major Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.0%	1.4%	0.5%	0.2%
Welling Major Town Centre	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	2.6%	0.7%	0.6%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	0.0%	0.7%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.7%	1.0%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northumberland Heath	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	1.6%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.3%	0.5%
All Other Out of Centre in the Borough	1.6%	2.5%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%
OUT OF CENTRE: SUB-TOTAL	3.2%	2.5%	0.0%	3.0%	2.3%	0.0%	0.0%	0.0%	1.1%	1.6%
BEXLEY BOROUGH RETENTION LEVEL:	39.4%	28.0%	10.7%	34.7%	8.3%	13.9%	1.0%	7.9%	16.4%	21.2%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	8.7%	7.8%	31.1%	7.2%	14.0%	21.4%	7.4%	20.9%	15.3%	16.2%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	12.7%	1.9%	2.8%	0.8%
Dartford	1.6%	3.5%	0.0%	0.0%	0.0%	0.9%	0.0%	5.7%	1.4%	1.0%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	12.6%	0.0%	2.5%	0.6%
Thamesmead	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.1%	0.2%
Other	3.7%	0.8%	0.0%	0.0%	1.5%	4.2%	1.1%	1.4%	1.7%	1.9%
OUTSIDE OF BOROUGH:	16.6%	12.1%	31.1%	7.2%	16.9%	32.0%	33.8%	30.0%	24.1%	20.9%
INTERNET:	44.0%	59.9%	58.2%	58.1%	74.8%	54.1%	65.2%	62.1%	59.5%	57.8%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 4: MEDICAL GOODS - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

Including Internet Shopping and other Special Forms of Trading ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	28.2%	37.3%	40.2%	67.3%	19.2%	12.8%	0.0%	6.4%	26.1%	33.0%
Crayford Major Town Centre	3.9%	14.2%	3.0%	7.2%	49.7%	0.4%	0.0%	19.4%	9.2%	10.3%
Erith Major Town Centre	5.5%	12.8%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	2.6%	3.4%
Sidcup Major Town Centre	0.0%	0.5%	0.0%	0.5%	1.6%	54.1%	1.3%	2.4%	10.2%	13.3%
Welling Major Town Centre	0.0%	1.3%	43.7%	0.6%	0.0%	0.9%	0.0%	1.4%	6.6%	8.1%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	24.4%	11.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	4.7%	5.8%
Bexley Village	3.9%	0.0%	0.4%	0.0%	10.3%	1.8%	0.0%	3.8%	1.9%	2.2%
Blackfen	0.0%	0.0%	1.8%	0.0%	0.0%	15.0%	0.0%	0.0%	2.9%	3.9%
Northumberland Heath	0.0%	6.4%	0.0%	0.5%	0.0%	0.0%	0.6%	0.0%	1.1%	1.3%
NEIGHBOURHOOD CENTRES:	3.2%	0.0%	0.0%	12.6%	0.8%	1.4%	0.6%	0.0%	2.2%	2.7%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	0.0%	0.9%	2.9%	2.5%	4.3%	0.0%	0.0%	0.0%	1.1%	1.5%
All Other Out of Centre in the Borough	1.5%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.3%	1.7%
OUT OF CENTRE: SUB-TOTAL	1.5%	8.5%	2.9%	2.5%	4.3%	0.0%	0.0%	0.7%	2.5%	3.2%
BEXLEY BOROUGH RETENTION LEVEL:	70.5%	92.1%	92.0%	92.4%	85.8%	86.4%	2.5%	34.0%	69.9%	87.0%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	6.1%	0.9%	2.5%	3.7%	7.3%	2.4%	1.4%	8.5%	3.4%	3.4%
Bromley	0.0%	0.0%	0.5%	2.0%	0.0%	0.0%	15.8%	0.0%	2.8%	0.4%
Dartford	0.9%	4.0%	0.0%	0.0%	1.5%	0.4%	0.0%	45.0%	4.0%	1.2%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	63.0%	0.7%	10.6%	0.9%
Thamesmead	13.5%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	1.8%	2.2%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	7.5%	0.0%	1.8%	0.6%	3.1%	6.9%	14.4%	9.7%	5.6%	3.4%
OUTSIDE OF BOROUGH:	28.0%	5.3%	4.7%	7.0%	11.9%	13.6%	94.6%	64.0%	28.2%	11.4%
INTERNET:	1.5%	2.6%	3.3%	0.5%	2.3%	0.0%	2.9%	2.0%	1.8%	1.6%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 5: PERSONAL CARE - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	39.5%	31.0%	51.7%	66.1%	19.8%	29.6%	0.7%	6.7%	30.8%	39.5%
Crayford Major Town Centre	5.5%	16.1%	4.7%	7.1%	44.2%	1.1%	0.0%	16.0%	9.0%	10.5%
Erith Major Town Centre	4.1%	12.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	2.3%	3.0%
Sidcup Major Town Centre	0.0%	0.0%	0.4%	0.5%	1.7%	30.9%	2.5%	2.5%	6.5%	7.7%
Welling Major Town Centre	0.9%	0.0%	19.6%	0.0%	0.0%	1.4%	0.0%	0.7%	3.2%	4.1%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	7.7%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.3%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	4.1%	0.3%	0.1%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.5%	0.6%
Northumberland Heath	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.1%	0.1%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	0.8%	2.1%	0.0%	2.7%	7.5%	0.0%	0.6%	0.7%	1.4%	1.7%
All Other Out of Centre in the Borough	6.5%	10.7%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	3.0%	3.9%
OUT OF CENTRE: SUB-TOTAL	7.3%	12.9%	0.0%	9.8%	7.5%	0.0%	0.6%	0.7%	4.4%	5.6%
BEXLEY BOROUGH RETENTION LEVEL:	65.0%	75.7%	76.4%	84.5%	73.9%	66.1%	3.8%	30.6%	58.3%	73.0%
OUTSIDE OF BOROUGH:										
Bluewater	8.1%	4.6%	11.0%	5.0%	7.0%	7.3%	2.8%	22.3%	7.3%	7.2%
Bromley	0.0%	0.4%	0.0%	2.1%	0.0%	2.2%	13.3%	0.0%	3.0%	0.9%
Dartford	0.8%	2.8%	0.0%	0.0%	3.6%	0.4%	0.0%	32.4%	2.7%	1.1%
Orpington	0.0%	0.0%	0.0%	0.0%	5.3%	2.2%	54.9%	0.0%	10.6%	1.1%
Thamesmead	12.2%	0.0%	3.3%	0.9%	0.0%	0.5%	0.0%	0.0%	2.0%	2.6%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%	0.1%
Other	9.8%	0.5%	4.6%	1.2%	6.2%	12.1%	8.0%	11.9%	6.8%	6.1%
OUTSIDE OF BOROUGH:	30.8%	8.3%	19.0%	9.1%	22.1%	25.0%	78.9%	66.6%	32.5%	19.1%
INTERNET:	4.2%	16.0%	4.6%	6.4%	4.0%	8.9%	17.3%	2.7%	9.2%	7.8%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 6: AUDIO VISUAL, PHOTOGRAPHIC, COMPUTER ITEMS - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shooping and other Special Forms of Trading

20	DNE: 1	2	3	4	5	6		8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	14.7	% 5.4%	4.6%	7.7%	1.6%	4.3%	0.0%	0.7%	4.4%	5.9%
Crayford Major Town Centre	6.9	% 4.9%	0.5%	5.6%	4.7%	0.5%	0.0%	3.7%	2.7%	3.3%
Erith Major Town Centre	2.8	% 4.6%	0.0%	0.0%	0.9%	0.5%	0.0%	1.1%	1.1%	1.4%
Sidcup Major Town Centre	0.0	% 0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	1.1%	1.5%
Welling Major Town Centre	0.0	% 0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
DISTRICT CENTRES:	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexley Village	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Blackfen	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northumberland Heath	1.9	% 7.19	6 0.0%	1.1%	0.0%	0.0%	0.0%	0.7%	1.2%	1.6%
NEIGHBOURHOOD CENTRES:	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0	% 0.0%	6 0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Madford Retail Park	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	26.7	% 22.8	% 28.1%	24.0%	34.8%	8.3%	0.0%	23.5%	18.3%	22.2%
All Other Out of Centre in the Borough	0.9	% 1.89	6 0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.7%	1.0%
OUT OF CENTRE: SUB-TOTAL	27.6	5% 24.6	% 28.1%	28.5%	34.8%	8.3%	0.0%	23.5%	19.1%	23.3%
BEXLEY BOROUGH RETENTION LEVEL:	53.8	3% 46.6	% 33.9%	42.9%	41.9%	19.4%	0.0%	29.7%	29.7%	37.1%
OUTSIDE OF BOROUGH:	0.0	% 0.0%	6 0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	11.:	16.3	% 18.7%	22.6%	17.3%	23.9%	9.0%	27.9%	18.1%	19.2%
Bromley	0.9	% 0.0%	0.4%	0.0%	0.0%	0.5%	2.8%	0.0%	0.7%	0.3%
Dartford	0.0	% 0.5%	6 0.0%	0.0%	0.0%	0.9%	0.0%	1.4%	0.4%	0.3%
Orpington	0.0	% 0.0%	4.5%	0.0%	1.6%	20.0%	57.2%	2.6%	15.0%	6.1%
Thamesmead	3.2	% 0.09	6 0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.4%	0.5%
Westfield Stratford	0.0	% 0.0%	6 0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.1%
Other	10.9	9% 6.19	2.8%	0.0%	4.6%	4.1%	0.0%	4.8%	3.7%	4.4%
OUTSIDE OF BOROUGH:	26.3	1% 22.9	% 26.4%	22.6%	24.3%	49.9%	69.0%	36.6%	38.3%	30.9%
INTERNET:	20.3	30.5	% 39.7%	34.5%	33.8%	30.7%	31.0%	33.6%	32.0%	32.0%
TOTAL MARKET SHARE:	100.	0% 100.0	% 100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 7: DOMESTIC ELECTRICAL GOODS AND WHITE GOODS - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:		2	3	4	5	6		8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	5.5%	11.2%	7.0%	15.9%	0.7%	6.3%	0.0%	1.4%	6.4%	8.2%
Crayford Major Town Centre	9.0%	4.1%	4.5%	2.8%	15.7%	2.8%	0.0%	6.7%	4.6%	5.4%
Erith Major Town Centre	2.5%	8.6%	0.0%	0.0%	0.9%	0.5%	0.0%	1.1%	1.6%	1.9%
Sidcup Major Town Centre	0.0%	0.0%	0.0%	0.0%	0.8%	4.3%	0.8%	0.0%	1.1%	1.2%
Welling Major Town Centre	0.0%	0.4%	7.2%	0.6%	0.0%	0.0%	0.0%	0.0%	1.2%	1.6%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Bexley Village	0.0%	0.0%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.2%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.4%	0.5%
Northumberland Heath	6.0%	8.5%	0.4%	3.8%	0.0%	0.0%	0.0%	1.3%	2.2%	2.8%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.8%	0.4%	0.0%	0.0%	0.2%	0.2%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	25.1%	23.2%	19.3%	29.0%	35.5%	9.8%	0.0%	31.4%	18.4%	21.4%
All Other Out of Centre in the Borough	1.8%	4.5%	0.5%	1.8%	0.0%	0.0%	0.0%	0.0%	1.0%	1.3%
OUT OF CENTRE: SUB-TOTAL	26.9%	27.7%	19.8%	30.8%	36.3%	10.3%	0.0%	31.4%	19.6%	22.9%
BEXLEY BOROUGH RETENTION LEVEL:	53.5%	60.6%	39.3%	53.9%	55.3%	26.4%	0.8%	41.9%	37.5%	45.1%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	5.2%	5.8%	15.0%	3.7%	9.6%	14.8%	5.0%	13.3%	9.3%	9.9%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	6.7%	0.0%	1.2%	0.1%
Dartford	0.0%	1.9%	0.0%	0.0%	3.8%	0.5%	0.0%	14.6%	1.5%	0.8%
Orpington	0.8%	0.0%	0.8%	1.1%	0.8%	22.2%	51.2%	2.5%	13.5%	6.3%
Thamesmead	3.8%	0.0%	1.3%	0.0%	0.0%	0.4%	0.0%	0.0%	0.6%	0.8%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	8.9%	0.8%	4.2%	1.1%	4.5%	3.0%	0.7%	1.3%	2.8%	3.4%
OUTSIDE OF BOROUGH:	18.7%	8.6%	21.4%	6.0%	18.7%	41.3%	63.6%	31.7%	29.0%	21.4%
INTERNET:	27.8%	30.8%	39.3%	40.1%	26.0%	32.3%	35.6%	26.5%	33.5%	33.6%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 8: BOOKS, STATIONERY - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	40.9%	30.3%	38.8%	46.0%	11.2%	22.6%	0.0%	1.9%	23.3%	31.3%
Crayford Major Town Centre	1.1%	2.5%	0.5%	1.8%	13.9%	1.3%	0.0%	6.0%	2.6%	2.9%
Erith Major Town Centre	4.3%	8.5%	0.0%	4.0%	0.0%	0.0%	0.0%	0.9%	2.0%	2.5%
Sidcup Major Town Centre	0.0%	0.0%	0.0%	0.6%	0.0%	7.9%	0.7%	1.4%	1.8%	2.1%
Welling Major Town Centre	0.0%	0.0%	9.5%	0.0%	0.0%	1.0%	0.0%	1.9%	1.6%	2.0%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.1%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.1%	0.1%
Northumberland Heath	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.9%	0.2%	0.1%
All Other Out of Centre in the Borough	3.6%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.7%
OUT OF CENTRE: SUB-TOTAL	3.6%	1.5%	0.0%	0.0%	0.9%	0.0%	0.0%	0.9%	0.7%	0.8%
BEXLEY BOROUGH RETENTION LEVEL:	56.7%	45.4%	48.7%	52.3%	26.8%	33.2%	0.7%	12.9%	33.0%	43.1%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	2.9%	5.2%	5.8%	10.7%	15.8%	15.6%	2.7%	20.2%	9.4%	9.8%
Bromley	0.9%	0.0%	0.0%	0.0%	0.8%	3.7%	9.5%	0.0%	2.5%	1.2%
Dartford	0.9%	2.4%	0.0%	0.0%	5.1%	0.0%	0.0%	32.5%	3.6%	1.1%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	45.6%	0.0%	9.6%	2.0%
Thamesmead	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.1%	0.1%
Other	5.8%	4.5%	2.0%	0.0%	4.1%	5.5%	3.0%	5.9%	3.8%	3.7%
OUTSIDE OF BOROUGH:	12.9%	12.1%	7.8%	10.7%	25.8%	33.1%	60.8%	58.5%	29.2%	18.2%
INTERNET:	30.4%	42.5%	43.4%	37.0%	47.4%	33.7%	38.5%	28.5%	37.8%	38.7%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 9: PETS, SPORTS, HOBBIES, BIKES - 2017 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH
									l.	Zones 1-6
Bexleyheath Strategic Centre	16.5%	14.6%	27.0%	30.2%	4.6%	12.7%	0.0%	0.9%	13.4%	17.9%
Crayford Major Town Centre	1.2%	17.2%	7.6%	6.0%	25.1%	5.7%	0.0%	16.3%	8.6%	9.8%
Erith Major Town Centre	0.0%	8.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.2%	1.6%
Sidcup Major Town Centre	0.0%	0.0%	0.6%	0.0%	0.0%	8.2%	0.0%	1.4%	1.7%	2.1%
Welling Major Town Centre	0.0%	0.0%	7.6%	0.0%	0.0%	0.7%	0.0%	0.0%	1.2%	1.6%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
Bexley Village	1.2%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.3%	0.4%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northumberland Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tower Retail Park	13.6%	17.6%	17.9%	13.3%	26.5%	6.1%	0.0%	25.5%	13.0%	14.7%
All Other Out of Centre in the Borough	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
OUT OF CENTRE: SUB-TOTAL	14.8%	19.3%	17.9%	13.3%	26.5%	6.1%	0.0%	25.5%	13.4%	15.2%
BEXLEY BOROUGH RETENTION LEVEL:	39.6%	59.2%	60.8%	50.8%	58.0%	33.4%	0.0%	44.1%	40.3%	49.4%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	3.7%	2.2%	4.3%	4.9%	10.6%	10.9%	0.7%	12.2%	5.7%	6.2%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	12.5%	0.0%	2.7%	0.7%
Dartford	0.0%	1.5%	0.0%	0.0%	3.8%	0.7%	0.8%	17.0%	2.2%	0.9%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	51.0%	0.0%	10.8%	2.5%
Thamesmead	16.6%	0.5%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	1.8%	2.4%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	9.5%	6.2%	7.9%	5.7%	3.8%	11.7%	6.0%	2.9%	7.2%	7.9%
OUTSIDE OF BOROUGH:	29.8%	10.4%	12.2%	10.5%	18.2%	37.0%	71.0%	32.1%	30.4%	20.6%
INTERNET:	30.6%	30.4%	26.9%	38.6%	23.8%	29.6%	29.0%	23.8%	29.4%	30.1%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 10: FURNITURE, FLOOR COVERINGS, HOUSEHOLD TEXTILES - 2018 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4		6		8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	10.9%	14.7%	2.7%	8.2%	11.7%	3.8%	0.0%	8.5%	6.6%	7.8%
Crayford Major Town Centre	1.7%	0.5%	0.0%	0.0%	7.0%	0.0%	0.0%	1.8%	1.0%	1.1%
Erith Major Town Centre	1.1%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%
Sidcup Major Town Centre	0.0%	0.5%	2.5%	0.0%	2.2%	9.0%	0.0%	1.4%	2.4%	3.1%
Welling Major Town Centre	5.6%	3.1%	12.2%	4.3%	2.2%	1.1%	0.8%	0.0%	3.7%	4.7%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.3%	0.3%
Northumberland Heath	0.0%	4.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
NEIGHBOURHOOD CENTRES:	0.0%	0.6%	0.6%	3.3%	1.0%	0.0%	0.0%	3.3%	0.9%	0.8%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	5.4%	1.1%	6.1%	0.7%	2.2%	7.6%	4.6%	4.0%	4.3%	4.3%
Madford Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tower Retail Park	1.2%	2.6%	1.1%	4.4%	2.1%	0.0%	0.0%	6.1%	1.8%	1.7%
All Other Out of Centre in the Borough	1.1%	4.6%	0.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%
OUT OF CENTRE: SUB-TOTAL	7.8%	8.3%	7.8%	5.8%	4.3%	7.6%	4.6%	10.1%	6.9%	7.1%
BEXLEY BOROUGH RETENTION LEVEL:	30.6%	37.4%	26.3%	21.6%	28.3%	22.8%	5.4%	25.1%	23.5%	27.3%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	8.7%	9.2%	13.1%	6.3%	13.5%	19.6%	6.9%	11.3%	11.5%	12.6%
Bromley	2.1%	0.0%	1.0%	0.0%	1.1%	0.6%	3.7%	0.0%	1.2%	0.7%
Dartford	14.7%	12.8%	5.1%	4.1%	17.7%	4.6%	0.0%	33.3%	9.2%	8.7%
Orpington	5.3%	6.7%	15.8%	7.0%	16.7%	24.8%	55.9%	9.5%	20.7%	14.1%
Thamesmead	6.6%	3.7%	4.3%	1.0%	0.0%	0.0%	0.0%	0.0%	1.8%	2.4%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	11.7%	9.4%	17.4%	23.1%	10.5%	11.1%	17.3%	6.5%	13.8%	13.8%
OUTSIDE OF BOROUGH:	49.1%	41.7%	56.6%	41.4%	59.4%	60.6%	83.9%	60.6%	58.2%	52.3%
INTERNET:	20.3%	20.8%	17.1%	37.0%	12.3%	16.5%	10.7%	14.4%	18.3%	20.4%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 11: DIY, GARDENING - 2017 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROU
										Zones 1-6
Bexleyheath Strategic Centre	5.0%	3.6%	8.5%	5.7%	4.1%	0.4%	0.0%	0.7%	3.2%	4.3%
Crayford Major Town Centre	2.1%	0.9%	0.0%	1.2%	1.7%	0.0%	0.0%	0.8%	0.6%	0.8%
Erith Major Town Centre	4.0%	4.4%	0.4%	4.7%	0.8%	0.0%	0.0%	0.0%	1.6%	2.1%
Sidcup Major Town Centre	0.0%	0.0%	2.6%	0.5%	1.7%	4.6%	3.2%	0.0%	2.0%	2.0%
Welling Major Town Centre	0.0%	0.0%	1.8%	0.0%	0.0%	0.9%	0.0%	5.0%	0.8%	0.6%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	1.7%	4.0%	0.0%	3.2%	2.9%	0.0%	0.0%	0.0%	1.3%	1.7%
Bexley Village	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%	0.0%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northumberland Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	1.0%	0.0%	5.7%	3.8%	25.8%	56.1%	27.0%	2.0%	19.3%	19.2%
Madford Retail Park	0.0%	0.4%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Tower Retail Park	0.0%	0.0%	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
All Other Out of Centre in the Borough	78.2%	73.2%	43.3%	48.8%	3.4%	1.4%	0.0%	0.8%	28.2%	37.9%
OUT OF CENTRE: SUB-TOTAL	79.1%	73.6%	49.4%	54.4%	29.3%	57.5%	27.0%	2.8%	47.8%	57.6%
BEXLEY BOROUGH RETENTION LEVEL:	92.0%	86.6%	62.7%	69.8%	40.5%	63.5%	30.1%	10.0%	57.4%	68.9%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bromley	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	1.3%	0.0%	0.5%	0.3%
Dartford	0.8%	9.4%	5.7%	21.9%	54.8%	4.6%	1.1%	80.2%	16.5%	13.6%
Orpington	0.0%	0.0%	0.9%	0.6%	2.4%	7.5%	44.5%	0.8%	10.0%	2.5%
Thamesmead	1.6%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.9%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	4.0%	1.1%	20.9%	1.2%	0.8%	23.4%	14.6%	2.9%	10.9%	10.8%
OUTSIDE OF BOROUGH:	6.4%	10.5%	31.0%	25.7%	58.0%	35.5%	61.5%	83.9%	38.4%	28.1%
INTERNET:	1.6%	2.9%	6.3%	4.5%	1.6%	1.0%	8.4%	6.2%	4.2%	3.0%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 12: ALL OTHER COMPARISON GOODS - 2017 MARKET SHARE ANALYSIS (%M) Including Internet Shopping and other Special Forms of Trading

ZONE		2	3	4		6		8	STUDY AREA	BEXLEY BOROUGH
										Zones 1-6
Bexleyheath Strategic Centre	49.0%	33.9%	27.9%	41.9%	15.9%	21.6%	1.3%	4.5%	23.5%	30.6%
Crayford Major Town Centre	0.0%	1.3%	0.0%	1.7%	4.6%	7.3%	0.0%	5.6%	2.6%	2.9%
Erith Major Town Centre	0.0%	2.9%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	1.0%	1.4%
Sidcup Major Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	1.1%	1.5%
Welling Major Town Centre	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%
DISTRICT CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belvedere (Nuxley Road)	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
Bexley Village	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.2%	0.3%
Blackfen	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.1%	0.2%
Northumberland Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NEIGHBOURHOOD CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Crittals Corner Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Madford Retail Park	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tower Retail Park	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.5%
All Other Out of Centre in the Borough	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
OUT OF CENTRE: SUB-TOTAL	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%
BEXLEY BOROUGH RETENTION LEVEL:	56.5%	42.9%	33.4%	49.3%	22.9%	35.4%	1.3%	10.2%	30.6%	39.5%
OUTSIDE OF BOROUGH:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater	21.1%	35.0%	39.3%	35.0%	59.9%	41.7%	7.8%	49.6%	34.0%	38.7%
Bromley	1.2%	0.0%	0.0%	0.0%	0.0%	1.3%	20.8%	1.5%	4.2%	0.5%
Dartford	0.0%	2.9%	2.9%	0.0%	0.0%	1.4%	0.0%	22.2%	2.6%	1.4%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	15.8%	0.0%	3.1%	0.4%
Thamesmead	4.4%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.6%
Westfield Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.1%	0.2%
Other	10.3%	5.0%	7.4%	1.8%	4.5%	5.0%	19.2%	5.7%	8.0%	5.5%
OUTSIDE OF BOROUGH:	37.0%	42.9%	50.2%	36.8%	64.4%	51.4%	63.6%	79.0%	52.4%	47.3%
INTERNET:	6.4%	14.2%	16.3%	13.9%	12.7%	13.2%	35.1%	10.8%	16.9%	13.2%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX A4: POPULATION PROJECTIONS & EXPENDITURE GROWTH

GLA POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

TABLE 1: GLA POPULATION GROWTH SCENARIO -	BASE YEAR POPUI	ATION & PRO	JECTIONS (201	8 - 2038)		GROWTH	2021 - 2031:	GROWTH	2021 - 2038:
ZONE:	2018	2021	2026	2031	2038	%	No.	%	No.
Zone 1	39,300	40,550	41,800	43,050	44,959	6.2%	2,500	10.9%	4,409
Zone 2	49,000	51,100	53,600	56,200	59,031	10.0%	5,100	15.5%	7,931
Zone 3	45,400	46,150	48,200	50,050	50,611	8.5%	3,900	9.7%	4,461
Zone 4	33,850	35,000	37,600	40,050	42,966	14.4%	5,050	22.8%	7,966
Zone 5	25,200	26,200	27,600	28,600	29,517	9.2%	2,400	12.7%	3,317
Zone 6	57,250	57,800	58,850	60,150	61,345	4.1%	2,350	6.1%	3,545
Zone 7	50,900	51,400	52,000	52,600	54,576	2.3%	1,200	6.2%	3,176
Zone 8	20,491	21,162	22,375	23,267	24,329	9.9%	2,105	15.0%	3,167
CATCHMENT AREA:	321,391	329,362	342,025	353,967	367,335	7.5%	24,605	11.5%	37,973
BEXLEY BOROUGH COUNCIL AREA (ZONES 1-6):	250,000	256,800	267,650	278,100	288,430	8.3%	21,300	12.3%	31,630
REST OF CATCHMENT AREA (ZONES 7-8):	71,391	72,562	74,375	75,867	78,905	4.6%	3,305	8.7%	6,343

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

Notes: Average spend per capita estimates (2016 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 18 published by Experian Business Strategies (October 2020).

TABLE 2: CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

	2018	2018	2021	2026	2031	2038
	INCLUDING SFT		EXCLUDING	SPECIAL FORMS	OF TRADING	
EXPERIAN-BASED SFT MARKET S	HARES (%):	3.8%	5.4%	6.3%	6.9%	7.3%
MID-POINT BETWEEN SURVEY 8	k EXPERIAN SHARES (2.6%	3.8%	4.4%	4.8%	5.1%
SURVEY-BASED SFT MARKET SH	ARES (%):	1.5%	2.1%	2.5%	2.7%	2.8%
Zone 1	£2,061	£2,006	£1,999	£1,990	£1,989	£1,997
Zone 2	£2,119	£2,063	£2,056	£2,046	£2,046	£2,054
Zone 3	£2,180	£2,122	£2,114	£2,105	£2,104	£2,113
Zone 4	£2,256	£2,196	£2,188	£2,178	£2,177	£2,186
Zone 5	£2,327	£2,265	£2,257	£2,246	£2,246	£2,255
Zone 6	£2,252	£2,192	£2,184	£2,174	£2,174	£2,182
Zone 7	£2,444	£2,379	£2,370	£2,360	£2,359	£2,368
Zone 8	£2,339	£2,277	£2,269	£2,258	£2,258	£2,267
CATCHMENT AREA - AVERAGE:	£2,247	£2,188	£2,180	£2,170	£2,169	£2,178
Source: Average spend per capita e	stimates (2016 prices) are d	lerived from Exper	ian MMG3 'Retail A	rea Planner' Repor	ts. The year-on-yea	r expenditure

Source: Average spend per capita estimates (2016 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing published by Experian Business Strategies.

Notes: At the Base Year (2018) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT- including mail order and Internet shopping). For the purpose of this assessment we have assumed a mid-point between the Experian market shares and the market shares derived from the household survey provides a best-fit based on current and forecast trends at the national, regional and local level; and taking account of the impact of the COVID-19 pandemic on shopping behaviour and purchases.

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

TABLE 3: TOTAL AVAILABLE CO	NVENIENCE GOODS E	XPENDITURE (£	million)				GROWTH 20	21 to 2031:	GROWTH 2	2021 to 2038:
	2018	2018	2021	2026	2031	2038	%	£m	%	£m
	INCLUDING SFT		EXCLUDING	SPECIAL FORMS	OF TRADING					
Zone 1	£81.0	£78.8	£81.0	£83.2	£85.6	£89.8	5.6%	£4.6	11.1%	£8.7
Zone 2	£103.8	£101.1	£105.0	£109.7	£115.0	£121.2	9.4%	£9.9	16.0%	£16.2
Zone 3	£99.0	£96.4	£97.6	£101.5	£105.3	£106.9	7.9%	£7.7	9.7%	£9.3
Zone 4	£76.4	£74.3	£76.6	£81.9	£87.2	£93.9	13.9%	£10.6	23.3%	£17.4
Zone 5	£58.6	£57.1	£59.1	£62.0	£64.2	£66.6	8.6%	£5.1	13.0%	£7.4
Zone 6	£128.9	£125.5	£126.2	£128.0	£130.7	£133.9	3.6%	£4.5	6.1%	£7.6
Zone 7	£124.4	£121.1	£121.8	£122.7	£124.1	£129.3	1.8%	£2.2	6.1%	£7.4
Zone 8	£47.9	£46.7	£48.0	£50.5	£52.5	£55.1	9.4%	£4.5	15.3%	£7.1
CATCHMENT AREA:	£720.0	£701.0	£715.5	£739.4	£764.7	£796.7	6.9%	£49.2	11.6%	£81.3
BEXLEY BOROUGH COUNCIL AREA (Z	ONES 1-6):	£533.3	£545.6	£566.2	£588.1	£612.3	7.8%	£42.4	12.5%	£66.7
REST OF CATCHMENT AREA (ZO	NES 7-8):	£167.8	£169.8	£173.2	£176.6	£184.4	4.0%	£6.8	8.6%	£14.6

GLA POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

	2018	2018	2021	2026	2031	2038				
	INCLUDING SFT	EXCLUDING SPECIAL FORMS OF TRADING								
EXPERIAN-BASED SFT MARKET	SHARES (%):	16.8%	21.8%	25.2%	27.2%	28.5%				
MID-POINT BETWEEN SURVEY	& EXPERIAN SHARES (%):	15.7%	20.4%	23.6%	25.5%	26.7%				
SURVEY-BASED SFT MARKET S	HARES (%):	14.7%	19.0%	22.0%	23.8%	24.9%				
Zone 1	£2,957	£2,492	£2,396	£2,687	£3,027	£3,638				
Zone 2	£3,209	£2,704	£2,600	£2,916	£3,285	£3,947				
Zone 3	£3,605	£3,038	£2,921	£3,276	£3,691	£4,435				
Zone 4	£3,870	£3,261	£3,136	£3,517	£3,962	£4,761				
Zone 5	£3,914	£3,298	£3,172	£3,557	£4,007	£4,814				
Zone 6	£3,809	£3,210	£3,087	£3,462	£3,900	£4,686				
Zone 7	£4,113	£3,466	£3,333	£3,738	£4,211	£5,060				
Zone 8	£4,098	£3,453	£3,320	£3,724	£4,195	£5,040				
CATCHMENT AREA - AVERAGE	£3,697	£3,115	£2,996	£3,360	£3,785	£4,548				

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

Average spend per capita estimates (2016 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 18 published by Experian Business Strategies (October 2020).

At the Base Year (2018) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including Notes: mail order and Internet shopping). For the purpose of this assessment we have assumed a mid-point between the Experian market shares and here your and mean mean suppring, for the poise of this assessment we have assume a mumpoint between the experiant market shares and the market shares derived from the household survey provides a best-fit based on current and forecast trends at the national, regional and local level; and taking account of the impact of the COVID-19 pandemic on shopping behaviour and purchases.

The predicted growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 18 (October 2020), and applied to the baseline SFT market share.

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million)

TABLE 5: TOTAL AVAILABLE C	OMPARISON GOODS EX	PENDITURE (£	million)				GROWTH 2	021 to 2031:	GROWTH 2021 to 2038:	
	2018	2018	2021	2026	2031	2038	%	£m	%	£m
	INCLUDING SFT		EXCLUDI	IG SPECIAL FORMS	OF TRADING					
Zone 1	£116.2	£97.9	£97.2	£112.3	£130.3	£163.5	34.1%	£33.2	67.8%	£66.4
Zone 2	£157.2	£132.5	£132.9	£156.3	£184.6	£233.0	38.9%	£51.7	75.6%	£100.1
Zone 3	£163.7	£137.9	£134.8	£157.9	£184.7	£224.4	37.0%	£49.9	65.0%	£89.6
Zone 4	£131.0	£110.4	£109.8	£132.3	£158.7	£204.6	44.6%	£48.9	85.9%	£94.8
Zone 5	£98.6	£83.1	£83.1	£98.2	£114.6	£142.1	37.9%	£31.5	71.0%	£59.0
Zone 6	£218.1	£183.8	£178.4	£203.7	£234.6	£287.5	31.5%	£56.2	59.3%	£109.0
Zone 7	£209.4	£176.4	£171.3	£194.4	£221.5	£276.1	29.3%	£50.2	59.4%	£104.8
Zone 8	£84.0	£70.8	£70.3	£83.3	£97.6	£122.6	38.9%	£27.3	74.0%	£52.4
CATCHMENT AREA	£1,178.2	£992.8	£977.7	£1,138.4	£1,326.6	£1,653.9	35.7%	£348.9	68.1%	£676.2
BEXLEY BOROUGH COUNCIL	AREA (ZONES 1-6):	£745.6	£736.1	£860.7	£1,007.5	£1,255.1	36.9%	£271.4	69.6%	£519.0
REST OF CATCHMENT AREA (Z	ONES 7-8):	£247.2	£241.6	£277.7	£319.1	£398.8	32.1%	£77.5	65.1%	£157.2

BEXLEY GROWTH STRATEGY - POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

TABLE 1: BEXLEY GROWTH STRATEGY - BASE YEA	R POPULATION &	PROJECTION	S (2018 - 2038	3)		_	GROWTH	2021 - 2031:
ZONE:	2018	2021	2026	2031	2038		%	No.
Zone 1	37,960	39,006	44,001	51,637	66,363		32.4%	12,631
Zone 2	47,585	49,780	54,653	62,060	84,459		24.7%	12,280
Zone 3	44,169	44,135	44,491	45,171	45,398		2.3%	1,036
Zone 4	33,150	33,197	33,922	35,910	36,766		8.2%	2,714
Zone 5	24,568	25,245	25,466	26,205	28,320		3.8%	960
Zone 6	55,643	55,726	56,626	57,029	57,454		2.3%	1,303
Zone 7	50,900	51,400	52,000	52,600	54,576		2.3%	1,200
Zone 8	20,491	21,162	22,375	23,267	24,329		9.9%	2,105
TOTAL CATCHMENT AREA:	314,466	319,651	333,534	353,880	397,665		10.7%	34,229
						-		
BEXLEY BOROUGH AREA (ZONES 1-6):	243,075	247,089	259,159	278,013	318,760		12.5%	30,924
REST OF CATCHMENT AREA (ZONES 7-8):	71,391	72,562	74,375	75,867	78,905		4.6%	3,305

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

Notes: Population projections (2018 to 2036) for Zones 1 to 6 are derived from the London Borough of Bexley Council as informed by the Bexley Growth Strategy. Projetions for Zones 7 are based

on the GLA's 2016-based projections for London wards. Projections for Zone 8 is obtained from Experian's base year population figures at ward level, sourced by Experian from the ONS (midyear) population figures.

TABLE 2: CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

	2018	2018	2021	2026	2031	2038
	INCLUDING SFT		EXCLUDING	SPECIAL FORM	S OF TRADING	
EXPERIAN-BASED SFT MARKET SI	HARES (%):	3.8%	5.4%	6.3%	6.9%	7.3%
MID-POINT BETWEEN SURVEY &	EXPERIAN SHARES (9	2.6%	3.8%	4.4%	4.8%	5.1%
SURVEY-BASED SFT MARKET SHA	ARES (%):	1.5%	2.1%	2.5%	2.7%	2.8%
Zone 1	£2,061	£2,006	£1,999	£1,990	£1,989	£1,997
Zone 2	£2,119	£2,063	£2,056	£2,046	£2,046	£2,054
Zone 3	£2,180	£2,122	£2,114	£2,105	£2,104	£2,113
Zone 4	£2,256	£2,196	£2,188	£2,178	£2,177	£2,186
Zone 5	£2,327	£2,265	£2,257	£2,246	£2,246	£2,255
Zone 6	£2,252	£2,192	£2,184	£2,174	£2,174	£2,182
Zone 7	£2,444	£2,379	£2,370	£2,360	£2,359	£2,368
Zone 8	£2,339	£2,277	£2,269	£2,258	£2,258	£2,267
CATCHMENT AREA - AVERAGE:	£2,247	£2,188	£2,180	£2,170	£2,169	£2,178

Average spend per capita estimates (2016 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year Source: expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 18 published by Experian Business Strategies (October 2020).

At the Base Year (2018) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping). For the purpose of this assessment we have assumed a mid-point between the Experian market shares and Notes the market shares derived from the household survey provides a best-fit based on current and forecast trends at the national, regional and local level; and taking account of the impact of the COVID-19 pandemic on shopping behaviour and purchases.

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

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (Emillion)

	2018	2018	2021	2026	2031	2038
	INCLUDING SFT		EXCLUDIN	IG SPECIAL FORMS	OF TRADING	
Zone 1	£78.2	£76.2	£78.0	£87.5	£102.7	£132.5
Zone 2	£100.8	£98.2	£102.3	£111.8	£126.9	£173.5
Zone 3	£96.3	£93.7	£93.3	£93.6	£95.0	£95.9
Zone 4	£74.8	£72.8	£72.6	£73.9	£78.2	£80.4
Zone 5	£57.2	£55.7	£57.0	£57.2	£58.8	£63.9
Zone 6	£125.3	£122.0	£121.7	£123.1	£124.0	£125.4
Zone 7	£124.4	£121.1	£121.8	£122.7	£124.1	£129.3
Zone 8	£47.9	£46.7	£48.0	£50.5	£52.5	£55.1
CATCHMENT AREA	£704.9	£686.3	£694.8	£720.5	£762.3	£855.9
BEXLEY BOROUGH COUNCIL AREA	ZONES 1-6):	£518.5	£524.9	£547.2	£585.7	£671.5
REST OF CATCHMENT AREA (Z	ONES 7-8):	£167.8	£169.8	£173.2	£176.6	£184.4

GROWTH 2	021 to 2031:	GROWTH 2	021 to 2038:
%	£m	%	£m
31.7%	£24.7	71.7%	£54.6
24.1%	£24.6	72.5%	£71.1
1.8%	£1.7	2.8%	£2.6
7.6%	£5.6	10.6%	£7.7
3.3%	£1.9	12.4%	£6.9
1.8%	£2.2	3.0%	£3.7
1.8%	£2.2	6.1%	£7.4
9.4%	£4.5	15.3%	£7.1
9.7%	£67.5	23.5%	£161.2
11.6%	£60.8	28.3%	£146.6
4.0%	£6.8	8.6%	£14.6

BEXLEY GROWTH STRATEGY - POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

	2018	2018	2021	2026	2031	2038
	INCLUDING SFT		EXCLUDIN	G SPECIAL FORMS	OF TRADING	
EXPERIAN-BASED SFT MARKET S	HARES (%):	16.8%	21.8%	25.2%	27.2%	28.5%
MID-POINT BETWEEN SURVEY 8	EXPERIAN SHARES (15.7%	20.4%	23.6%	25.5%	26.7%
SURVEY-BASED SFT MARKET SH	ARES (%):	14.7%	19.0%	22.0%	23.8%	24.9%
Zone 1	£2,957	£2,492	£2,396	£2,687	£3,027	£3,638
Zone 2	£3,209	£2,704	£2,600	£2,916	£3,285	£3,947
Zone 3	£3,605	£3,038	£2,921	£3,276	£3,691	£4,435
Zone 4	£3,870	£3,261	£3,136	£3,517	£3,962	£4,761
Zone 5	£3,914	£3,298	£3,172	£3,557	£4,007	£4,814
Zone 6	£3,809	£3,210	£3,087	£3,462	£3,900	£4,686
Zone 7	£4,113	£3,466	£3,333	£3,738	£4,211	£5,060
Zone 8	£4,098	£3,453	£3,320	£3,724	£4,195	£5,040
CATCHMENT AREA - AVERAGE:	£3,697	£3,115	£2,996	£3,360	£3,785	£4,548

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

Source: Average spend per capita estimates (2016 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 18 published by Experian Business Strategies (October 2020).

Notes: At the Base Year (2018) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping). For the purpose of this assessment we have assumed a mid-point between the Experian market shares and the market shares derived from the household survey provides a best-fit based on current and forecast trends at the national, regional and local level; and taking account of the impact of the COVID-19 pandemic on shopping behaviour and purchases.

The predicted growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 18 (October 2020), and applied to the baseline SFT market share.

TABLE 5. TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (Emillion)

TABLE 5: TOTAL AVAILABLE CO	MPARISON GOODS E	XPENDITURE	(£million)				GROWTH	2021 to 2031:	GROWTH 2021 to 2038:		
	2018	2018	2021	2026	2031	2038	%	£m	%	£m	
	INCLUDING SFT		EXCLUDIN	IG SPECIAL FORMS	OF TRADING						
Zone 1	£112.3	£94.6	£93.5	£118.2	£156.3	£241.4	67.2%	£62.9	156.4%	£147.9	
Zone 2	£152.7	£128.7	£129.4	£159.4	£203.9	£333.4	57.5%	£74.4	158.5%	£203.9	
Zone 3	£159.2	£134.2	£128.9	£145.8	£166.7	£201.3	29.3%	£37.8	54.0%	£72.4	
Zone 4	£128.3	£108.1	£104.1	£119.3	£142.3	£175.0	36.7%	£38.2	65.6%	£70.9	
Zone 5	£96.2	£81.0	£80.1	£90.6	£105.0	£136.3	31.1%	£24.9	69.5%	£56.3	
Zone 6	£212.0	£178.6	£172.0	£196.0	£222.4	£269.2	29.3%	£50.4	54.4%	£97.2	
Zone 7	£209.4	£176.4	£171.3	£194.4	£221.5	£276.1	29.3%	£50.2	59.4%	£104.8	
Zone 8	£84.0	£70.8	£70.3	£83.3	£97.6	£122.6	38.9%	£27.3	74.0%	£52.4	
CATCHMENT AREA:	£1,153.9	£972.3	£949.6	£1,107.0	£1,315.7	£1,755.5	38.5%	£366.1	82.9%	£805.9	
BEXLEY BOROUGH COUNCIL AR	EA (ZONES 1-6):	£725.2	£708.0	£829.3	£996.6	£1,356.7	40.8%	£288.5	89.5%	£648.7	
REST OF CATCHMENT AREA (ZO	NES 7-8):	£247.2	£241.6	£277.7	£319.1	£398.8	32.1%	£77.5	65.1%	£157.2	

APPENDIX A5:

CONVENIENCE GOODS TURNOVER FORECASTS

TABLE 1: GLA GROWTH: ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8
BEXLEYHEATH MAJOR CENTRE								
Asda, The Broadway, Bexleyheath	7.3%	13.6%	12.6%	22.3%	4.9%	6.6%	0.0%	1.4%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	0.9%	0.3%	3.9%	0.7%	0.4%	0.2%
Marks & Spencer, Broadway, Bexleyheath	3.6%	2.5%	2.1%	2.4%	2.3%	1.9%	0.0%	0.4%
Sainsbury's, Broadway, Bexleyheath	5.6%	3.8%	3.5%	3.5%	1.2%	1.4%	0.0%	0.3%
Other stores in Bexleyheath	0.0%	1.1%	0.2%	0.9%	0.0%	0.2%	0.0%	0.2%
BEXLEYHEATH: SUB-TOTAL	16.5%	20.9%	19.4%	29.7%	12.2%	10.9%	0.4%	2.4%
CRAYFORD TOWN CENTRE								
Aldi Roman Way, Dartford	0.0%	3.5%	1.2%	6.1%	9.2%	0.8%	0.1%	5.0%
Iceland, Crayford Road, Crayford	0.0%	0.1%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%
Sainsbury's, Stadium Way, Crayford	4.7%	11.0%	6.3%	14.2%	31.0%	2.5%	0.0%	19.3%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
CRAYFORD: SUB-TOTAL	4.7%	14.6%	7.5%	20.3%	41.7%	3.3%	0.1%	24.7%
ERITH TOWN CENTRE								
Farmfoods, Pier Road, Erith	0.2%	0.6%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Iceland, Town Square, Erith	0.0%	1.5%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Morrisons, James Watt Way, Erith	11.5%	29.7%	0.4%	8.1%	2.2%	0.0%	0.0%	2.0%
Local shops, Erith Town Centre	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ERITH: SUB-TOTAL	11.9%	32.1%	0.4%	8.3%	2.2%	0.0%	0.0%	2.0%
SIDCUP TOWN CENTRE					/			/
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	0.1%	0.0%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	3.7%	0.8%	6.4%	0.1%	0.0%
Morrisons, Jenner Close, Sidcup	0.0%	0.3%	0.3%	0.1%	1.0%	23.4%	2.2%	0.5%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.5%	0.0%
SIDCUP: SUB-TOTAL WELLING TOWN CENTRE	0.0%	0.3%	0.3%	3.8%	2.0%	30.7%	3.0%	0.5%
	0.2%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Welling High Street, Welling Lidl, Upper Wickham Lane, Welling	0.2% 0.2%	0.0% 0.1%	2.0% 7.4%	0.0% 0.1%	0.0% 0.0%	0.0% 0.0%	0.0% 0.0%	0.0% 0.2%
Morrisons, Welling High Street, Welling	1.2%	0.1%	15.6%	2.3%	0.0%	0.5%	0.0%	0.2%
Tesco Superstore, Welling High Street, Welling	1.0%	0.8%	15.9%	1.2%	1.3%	2.0%	0.4%	0.6%
Local shops, Welling Town Centre	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
WELLING: SUB-TOTAL	2.6%	1.3%	42.0%	3.6%	1.5%	2.5%	0.4%	1.2%
DISTRICT CENTRES								
Belvedere	11.7%	2.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexley	0.0%	0.1%	0.5%	0.0%	2.7%	0.1%	0.0%	0.9%
Blackfen	0.0%	0.0%	0.7%	0.0%	0.0%	7.3%	0.0%	0.0%
Northumberland Heath	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL DISTRICT CENTRES: SUB-TOTAL	11.7%	2.2%	1.3%	0.0%	2.7%	7.4%	0.0%	0.9%
NEIGHBOURHOOD CENTRES	1.3%	11.0%	16.5%	18.9%	12.7%	14.5%	6.1%	4.5%
OUT OF CENTRE								
Asda, Picardy Manor Way, Station Road, Belvedere	15.7%	10.2%	0.5%	3.2%	0.5%	0.0%	0.0%	0.0%
Asda, Crook Log, Bexleyheath	1.2%	0.6%	3.2%	2.5%	3.9%	0.6%	0.0%	2.8%
Lidl, Eynsham Drive, Abbey Wood	3.2%	0.4%	0.0%	0.9%	0.0%	0.0%	0.1%	0.0%
Other	0.2%	0.1%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
ALL OUT OF CENTRE: SUB-TOTAL	20.4%	11.3%	3.7%	8.8%	4.5%	0.6%	0.1%	2.8%
BEXLEY BOROUGH TOTAL RETENTION:	69.1%	93.7%	91.0%	93.4%	79.4%	69.9%	10.2%	39.0%
	0012/0		011070		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	001070		001070
OUTSIDE OF BOROUGH Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	1 00/	0.20/	0 69/	12 00/	11 /0/	1 00/
Sainsbury's, Harow Mannor Way, Abbey Wood	0.0% 9.1%	0.0% 0.8%	1.0% 0.8%	0.3% 0.0%	9.6% 0.0%	13.8% 0.1%	11.4% 0.0%	4.9% 0.0%
Bromley	9.1% 0.0%	0.8%	0.8%	0.0%	0.0%	0.1%	2.2%	0.0%
Dartford	0.0%	0.0% 1.9%	0.0%	0.4% 1.9%	0.2%	0.2%	0.6%	0.0% 14.3%
Orpington	0.0%	0.0%	0.1%	0.0%	0.2%	1.5%	39.3%	0.2%
Thamesmead	20.2%	1.0%	4.4%	1.3%	2.4%	1.1%	0.0%	0.2%
Other	1.6%	2.6%	2.8%	2.7%	6.8%	13.2%	36.4%	41.6%
ALL OUT OF BOROUGH: SUB-TOTAL	30.9%	6.3%	9.0%	6.6%	20.6%	30.1%	89.8%	61.0%
	30.378	0.370	5.078	0.070	20.070	30.1/0	05.070	01.078
STUDY AREA MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%

Notes: Figures may not sum due to rounding

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

All Convenience Goods Expenditure Allocated to Existing Centres, Stores and Shopping Locations by Zone Excluding Internet Shopping and other Special Forms of Trading

Excluding Internet Shopping and other Special For	ns of Tradin	g								
									TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH
ZONE:	1	2	3	4	5	6	7	8	Zones 1-8	Zones 1-6
TOTAL AVAILABLE SPEND (excluding SF		£101.1	£96.4	£74.3	£57.1	£125.5	£121.1	£46.7	£701.0	£533.3
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	£5.72	£13.72	£12.13	£16.61	£2.78	£8.34	£0.00	£0.65	£59.94	£59.29
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.09	£0.16	£0.00	£0.13	£0.00	£0.00	£0.39	£0.39
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.89	£0.25	£2.21	£0.87	£0.48	£0.08	£4.78	£4.22
Marks & Spencer, Broadway, Bexleyheath	£2.88	£2.57	£2.05	£1.79	£1.29	£2.37	£0.00	£0.18	£13.12	£12.94
Sainsbury's, Broadway, Bexleyheath	£4.45	£3.83	£3.37	£2.60	£0.71	£1.72	£0.00	£0.16	£16.83	£16.68
Other stores in Bexleyheath BEXLEYHEATH: SUB-TOTAL	£0.00 £13.05	£1.07 £21.18	£0.15 £18.67	£0.64 £22.05	£0.00 £6.98	£0.30 £13.73	£0.00 £0.48	£0.08 £1.14	£2.23 £97.30	£2.16 £95.67
CRAYFORD TOWN CENTRE	115.05	121.10	110.07	122.05	10.55	115.75	10.40	11.14	197.30	155.07
Aldi Roman Way, Dartford	£0.00	£3.57	£1.16	£4.52	£5.27	£1.01	£0.14	£2.33	£18.02	£15.54
Iceland, Crayford Road, Crayford	£0.00	£0.10	£0.00	£0.00	£0.84	£0.00	£0.00	£0.00	£0.94	£0.94
Sainsbury's, Stadium Way, Crayford	£3.72	£11.11	£6.10	£10.54	£17.71	£3.13	£0.00	£9.00	£61.30	£52.30
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.18	£0.00
CRAYFORD: SUB-TOTAL	£3.72	£14.78	£7.26	£15.06	£23.82	£4.14	£0.14	£11.51	£80.44	£68.78
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	£0.16	£0.65	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.88	£0.88
Iceland, Town Square, Erith	£0.00	£1.53	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£1.60	£1.60
Morrisons, James Watt Way, Erith	£9.08	£30.04	£0.40	£6.04	£1.28	£0.00	£0.00	£0.91	£47.75	£46.83
Local shops, Erith Town Centre ERITH: SUB-TOTAL	£0.13 £9.36	£0.25 £32.46	£0.00 £0.40	£0.00 £6.20	£0.00 £1.28	£0.00 £0.00	£0.00 £0.00	£0.00 £0.91	£0.38 £50.61	£0.38 £49.69
SIDCUP TOWN CENTRE	19.30	132.40	10.40	10.20	11.20	10.00	10.00	10.91	150.01	145.05
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.09	£0.49	£0.17	£0.00	£0.75	£0.58
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£2.76	£0.45	£8.08	£0.17	£0.00	£11.45	£11.29
Morrisons, Jenner Close, Sidcup	£0.00	£0.25	£0.26	£0.07	£0.58	£29.32	£2.69	£0.21	£33.39	£30.49
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.62	£0.56	£0.00	£1.19	£0.62
SIDCUP: SUB-TOTAL	£0.00	£0.25	£0.26	£2.83	£1.11	£38.51	£3.59	£0.21	£46.78	£42.98
	60 4 F	~~ ~~		<u></u>	<u></u>	~~~~~	~~ ~~	~ ~ ~	62.00	c2.00
lceland, Welling High Street, Welling Lidl, Upper Wickham Lane, Welling	£0.15 £0.15	£0.00 £0.10	£1.94 £7.13	£0.00 £0.07	£0.00 £0.00	£0.00 £0.00	£0.00 £0.00	£0.00 £0.09	£2.09 £7.54	£2.09 £7.46
Morrisons, Welling High Street, Welling	£0.15 £0.97	£0.10 £0.35	£15.06	£0.07 £1.73	£0.00 £0.08	£0.00 £0.58	£0.00 £0.00	£0.09 £0.20	£18.97	£18.78
Tesco Superstore, Welling High Street, Welling	£0.75	£0.82	£15.30	£0.90	£0.76	£2.53	£0.48	£0.29	£21.83	£21.05
Local shops, Welling Town Centre	£0.00	£0.00	£1.03	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£1.03
WELLING: SUB-TOTAL	£2.02	£1.27	£40.46	£2.71	£0.84	£3.11	£0.48	£0.58	£51.46	£50.40
DISTRICT CENTRES										
Belvedere	£9.25	£2.04	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£11.38	£11.38
Bexley	£0.00	£0.08	£0.48	£0.00	£1.53	£0.17	£0.00	£0.44	£2.70	£2.26
Blackfen Northumberland Heath	£0.00	£0.00 £0.09	£0.65 £0.00	£0.00 £0.00	£0.00 £0.00	£9.14 £0.00	£0.00	£0.00	£9.79 £0.09	£9.79 £0.09
ALL DISTRICT CENTRES: SUB-TOTAL	£0.00 £9.25	£0.09 £2.21	£0.00 £1.23	£0.00	£0.00 £1.53	£0.00 £9.30	£0.00 £0.00	£0.00 £0.44	£23.96	£0.09
NEIGHBOURHOOD CENTRES	£1.01	£11.15	£15.86	£14.03	£7.24	£18.21	£7.44	£2.08	£77.00	£67.49
OUT OF CENTRE	11.01	111.15	115.00	114.05	17.24	110.21	17.44	12.00	177.00	107.45
Asda, Picardy Manor Way, Station Road, Belvedere	£12.39	£10.35	£0.45	£2.36	£0.30	£0.00	£0.00	£0.00	£25.86	£25.86
Asda, Crook Log, Bexleyheath	£0.99	£0.65	£3.08	£1.88	£2.24	£0.75	£0.00	£1.30	£10.89	£9.59
Lidl, Eynsham Drive, Abbey Wood	£2.56	£0.37	£0.00	£0.64	£0.00	£0.00	£0.16	£0.00	£3.73	£3.57
Other	£0.15	£0.10	£0.00	£1.68	£0.00	£0.00	£0.00	£0.00	£1.92	£1.92
ALL OUT OF CENTRE: SUB-TOTAL	£16.09	£11.47	£3.53	£6.56	£2.54	£0.75	£0.16	£1.30	£42.40	£40.94
BEXLEY BOROUGH TOTAL RETENTION:	£54.50	£94.77	£87.65	£69.44	£45.34	£87.75	£12.30	£18.18	£469.94	£439.46
OUTSIDE OF BOROUGH										
Tesco Superstore, Edgington Way, Foots Cray	£0.00	£0.00	£0.92	£0.23	£5.47	£17.33	£13.82	£2.31	£40.08	£23.96
Sainsbury's, Harow Mannor Way, Abbey Wood	£7.19	£0.80	£0.76	£0.00	£0.00	£0.13	£0.00	£0.00	£8.88	£8.88
Bromley	£0.00	£0.00	£0.00	£0.26	£0.10	£0.31	£2.67	£0.00	£3.33	£0.67
Dartford	£0.00	£1.91	£0.13	£1.41	£0.81	£0.11	£0.68	£6.66	£11.71	£4.37
Orpington Thamesmead	£0.00 £15.93	£0.00 £0.98	£0.00 £4.20	£0.00 £0.99	£0.10 £1.37	£1.93 £1.41	£47.57 £0.00	£0.09 £0.00	£49.69 £24.89	£2.03 £24.89
Other	£15.93 £1.24	£0.98 £2.64	£4.20 £2.69	£0.99 £2.00	£1.37 £3.90	£1.41 £16.54	£0.00 £44.08	£0.00 £19.42	£24.89 £92.50	£24.89 £29.00
ALL OUT OF BOROUGH: SUB-TOTAL	£24.35	£6.33	£8.70	£4.90	£11.74	£37.77	£108.81	£28.48	£231.09	£93.80
STUDY AREA MARKET SHARE	£78.8	£101.1	£96.4	£74.3	£57.1	£125.5	£121.1	£46.7	£701.0	£533.3

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

									TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH
ZONE:	1	2	3	4	5	6	7	8		Zones 1-6
TOTAL AVAILABLE SPEND (excluding SFT	£81.0	£105.0	£97.6	£76.6	£59.1	£126.2	£121.8	£48.0	£715.5	£545.6
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	£5.88	£14.25	£12.28	£17.11	£2.88	£8.38	£0.00	£0.67	£61.45	£60.79
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.09	£0.16	£0.00	£0.13	£0.00	£0.00	£0.39	£0.39
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.90	£0.26	£2.28	£0.88	£0.49	£0.08	£4.89	£4.32
Marks & Spencer, Broadway, Bexleyheath	£2.96	£2.67	£2.07	£1.84	£1.33	£2.39	£0.00	£0.19	£13.45	£13.26
Sainsbury's, Broadway, Bexleyheath	£4.58	£3.98	£3.41	£2.67	£0.74	£1.73	£0.00	£0.16	£17.27	£17.10
Other stores in Bexleyheath	£0.00	£1.11	£0.15	£0.66	£0.00	£0.30	£0.00	£0.08	£2.30	£2.22
BEXLEYHEATH: SUB-TOTAL CRAYFORD TOWN CENTRE	£13.41	£22.01	£18.91	£22.72	£7.23	£13.81	£0.49	£1.18	£99.75	£98.09
Aldi Roman Way, Dartford	£0.00	£3.71	£1.17	£4.66	£5.46	£1.01	£0.15	£2.40	£18.57	£16.02
Iceland, Crayford Road, Crayford	£0.00	£0.11	£0.00	£0.00	£0.87	£0.00	£0.13	£0.00	£0.97	£0.97
Sainsbury's, Stadium Way, Crayford	£3.82	£11.54	£6.18	£10.86	£18.34	£3.15	£0.00	£9.26	£63.14	£53.88
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.19	£0.00
CRAYFORD: SUB-TOTAL	£0.00 £3.82	£15.36	£0.00 £7.35	£0.00 £15.52	£0.00 £24.67	£0.00 £4.16	£0.00 £0.15	£0.19 £11.85	£82.87	£70.88
ERITH TOWN CENTRE	13.02	113.30	11.55	113.32	124.07	14.10	10.15	111.05	102.07	1,0.00
Farmfoods, Pier Road, Erith	£0.16	£0.67	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.91	£0.91
Iceland, Town Square, Erith	£0.00	£1.59	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£1.66	£1.66
Morrisons, James Watt Way, Erith	£9.33	£31.20	£0.40	£6.22	£1.33	£0.00	£0.00	£0.94	£49.43	£48.49
Local shops, Erith Town Centre	£0.13	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.39	£0.39
ERITH: SUB-TOTAL	£9.62	£33.72	£0.40	£6.38	£1.33	£0.00	£0.00	£0.94	£52.39	£51.45
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.09	£0.49	£0.18	£0.00	£0.76	£0.58
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£2.84	£0.46	£8.12	£0.17	£0.00	£11.60	£11.43
Morrisons, Jenner Close, Sidcup	£0.00	£0.26	£0.26	£0.08	£0.60	£29.49	£2.70	£0.22	£33.61	£30.69
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.63	£0.56	£0.00	£1.19	£0.63
SIDCUP: SUB-TOTAL	£0.00	£0.26	£0.26	£2.92	£1.15	£38.74	£3.61	£0.22	£47.17	£43.34
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	£0.15	£0.00	£1.97	£0.00	£0.00	£0.00	£0.00	£0.00	£2.12	£2.12
Lidl, Upper Wickham Lane, Welling	£0.15	£0.11	£7.22	£0.08	£0.00	£0.00	£0.00	£0.09	£7.65	£7.56
Morrisons, Welling High Street, Welling	£1.00	£0.36	£15.25	£1.79	£0.09	£0.58	£0.00	£0.20	£19.27	£19.07
Tesco Superstore, Welling High Street, Welling	£0.77	£0.85	£15.49	£0.93	£0.78	£2.54	£0.49	£0.30	£22.16	£21.37
Local shops, Welling Town Centre	£0.00	£0.00	£1.04	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£1.04
WELLING: SUB-TOTAL	£2.07	£1.32	£40.97	£2.79	£0.87	£3.12	£0.49	£0.60	£52.23	£51.15
DISTRICT CENTRES										
Belvedere	£9.51	£2.11	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£11.72	£11.72
Bexley	£0.00	£0.09	£0.49	£0.00	£1.58	£0.17	£0.00	£0.46	£2.78	£2.33
Blackfen	£0.00	£0.00	£0.66	£0.00	£0.00	£9.19	£0.00	£0.00	£9.85	£9.85
Northumberland Heath	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.09
ALL DISTRICT CENTRES: SUB-TOTAL	£9.51	£2.29	£1.24	£0.00	£1.58	£9.36	£0.00	£0.46	£24.44	£23.99
NEIGHBOURHOOD CENTRES	£1.04	£11.58	£16.06	£14.45	£7.50	£18.31	£7.48	£2.14	£78.55	£68.94
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	£12.74	£10.75	£0.46	£2.43	£0.31	£0.00	£0.00	£0.00	£26.69	£26.69
Asda, Crook Log, Bexleyheath	£1.01	£0.68	£3.12	£1.94	£2.32	£0.76	£0.00	£1.34	£11.16	£9.82
Lidl, Eynsham Drive, Abbey Wood	£2.63	£0.39	£0.00	£0.66	£0.00	£0.00	£0.16	£0.00	£3.83	£3.68
Other	£0.15	£0.10	£0.00	£1.73	£0.00	£0.00	£0.00	£0.00	£1.98	£1.98
ALL OUT OF CENTRE: SUB-TOTAL	£16.53	£11.92	£3.57	£6.75	£2.63	£0.76	£0.16	£1.34	£43.67	£42.17
BEXLEY BOROUGH TOTAL RETENTION:	£56.02	£98.46	£88.76	£71.53	£46.96	£88.26	£12.37	£18.71	£481.07	£449.99
OUTSIDE OF BOROUGH										
	£0.00	£0.00	£0.93	£0.24	£5 67	£17 44	£13.90	£2.37	£40.55	£34.37
Tesco Superstore, Edgington Way, Foots Cray Sainsbury's, Harow Mannor Way, Abbey Wood	£0.00 £7.39	£0.00 £0.84	£0.93 £0.77	£0.24 £0.00	£5.67 £0.00	£17.44 £0.13	£13.90 £0.00	£2.37 £0.00	£9.13	£24.27 £9.13
Bromley										
	£0.00	£0.00	£0.00	£0.27	£0.10	£0.31	£2.68	£0.00	£3.36	£0.68
Dartford	£0.00	£1.99	£0.14	£1.45	£0.84	£0.11	£0.68	£6.86	£12.06	£4.52
Orpington Thamesmead	£0.00	£0.00	£0.00	£0.00	£0.10	£1.94	£47.86	£0.09	£49.99	£2.04
	£16.37	£1.02	£4.25	£1.02	£1.42	£1.42	£0.00	£0.00	£25.51	£25.51
Other	£1.27	£2.74	£2.72	£2.06 £5.05	£4.04	£16.63 £37.99	£44.34	£19.98	£93.79 £234.39	£29.47 £95.62
ALL OUT OF BOROUGH: SUB-TOTAL	£25.03	£6.58	£8.81		£12.16		£109.47	£29.30		

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

									TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH
ZONE:	1	2	3	4	5	6	7	8	(STODY) AREA	Zones 1-6
TOTAL AVAILABLE SPEND (excluding SFT	£83.2	£109.7	£101.5	£81.9	£62.0	£128.0	£122.7	£50.5	£739.4	£566.2
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	£6.03	£14.88	£12.77	£18.30	£3.02	£8.50	£0.00	£0.70	£64.20	£63.50
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.10	£0.18	£0.00	£0.14	£0.00	£0.00	£0.41	£0.41
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.94	£0.28	£2.40	£0.89	£0.49	£0.09	£5.08	£4.50
Marks & Spencer, Broadway, Bexleyheath	£3.03	£2.79	£2.16	£1.97	£1.40	£2.42	£0.00	£0.20	£13.96	£13.76
Sainsbury's, Broadway, Bexleyheath	£4.70	£4.15	£3.55	£2.86	£0.77	£1.75	£0.00	£0.17	£17.95	£17.78
Other stores in Bexleyheath	£0.00	£1.16	£0.15	£0.71	£0.00	£0.31	£0.00	£0.08	£2.41	£2.33
BEXLEYHEATH: SUB-TOTAL	£13.76	£22.98	£19.66	£24.29	£7.58	£14.00	£0.49	£1.24	£104.01	£102.28
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	£0.00	£3.88	£1.22	£4.98	£5.73	£1.03	£0.15	£2.53	£19.51	£16.83
Iceland, Crayford Road, Crayford	£0.00	£0.11	£0.00	£0.00	£0.91	£0.00	£0.00	£0.00	£1.02	£1.02
Sainsbury's, Stadium Way, Crayford	£3.92	£12.05	£6.42	£11.61	£19.23	£3.19	£0.00	£9.74	£66.17	£56.43
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£0.20	£0.00
CRAYFORD: SUB-TOTAL	£3.92	£16.04	£7.64	£16.59	£25.87	£4.22	£0.15	£12.47	£86.90	£74.28
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	£0.17	£0.70	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.95	£0.95
Iceland, Town Square, Erith	£0.00	£1.66	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£1.74	£1.74
Morrisons, James Watt Way, Erith	£9.57	£32.58	£0.42	£6.66	£1.39	£0.00	£0.00	£0.99	£51.61	£50.62
Local shops, Erith Town Centre	£0.14	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.41	£0.41
ERITH: SUB-TOTAL	£9.87	£35.21	£0.42	£6.83	£1.39	£0.00	£0.00	£0.99	£54.71	£53.72
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.10	£0.50	£0.18	£0.00	£0.77	£0.60
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£3.04	£0.49	£8.23	£0.17	£0.00	£11.93	£11.76
Morrisons, Jenner Close, Sidcup	£0.00	£0.28	£0.27	£0.08	£0.62	£29.89	£2.72	£0.23	£34.10	£31.15
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.64	£0.57	£0.00	£1.20	£0.64
SIDCUP: SUB-TOTAL	£0.00	£0.28	£0.27	£3.12	£1.21	£39.26	£3.64	£0.23	£48.01	£44.14
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	£0.15	£0.00	£2.04	£0.00	£0.00	£0.00	£0.00	£0.00	£2.20	£2.20
Lidl, Upper Wickham Lane, Welling	£0.16	£0.11	£7.51	£0.08	£0.00	£0.00	£0.00	£0.10	£7.95	£7.86
Morrisons, Welling High Street, Welling	£1.02	£0.38	£15.86	£1.91	£0.09	£0.59	£0.00	£0.21	£20.06	£19.85
Tesco Superstore, Welling High Street, Welling	£0.79	£0.89	£16.11	£1.00	£0.82	£2.58	£0.49	£0.32	£22.99	£22.18
Local shops, Welling Town Centre	£0.00	£0.00	£1.08	£0.00	£0.00	£0.00	£0.00	£0.00	£1.08	£1.08
WELLING: SUB-TOTAL	£2.13	£1.38	£42.60	£2.99	£0.91	£3.17	£0.49	£0.63	£54.28	£53.17
DISTRICT CENTRES										
Belvedere	£9.76	£2.21	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£12.07	£12.07
Bexley	£0.00	£0.09	£0.51	£0.00	£1.66	£0.17	£0.00	£0.48	£2.91	£2.43
Blackfen	£0.00	£0.00	£0.69	£0.00	£0.00	£9.31	£0.00	£0.00	£10.00	£10.00
Northumberland Heath	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.10
ALL DISTRICT CENTRES: SUB-TOTAL	£9.76	£2.40	£1.29	£0.00	£1.66	£9.49	£0.00	£0.48	£25.07	£24.59
	£1.07									
NEIGHBOURHOOD CENTRES	£1.07	£12.09	£16.69	£15.45	£7.86	£18.56	£7.53	£2.25	£81.51	£71.73
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	£13.07	£11.23	£0.48	£2.60	£0.33	£0.00	£0.00	£0.00	£27.70	£27.70
Asda, Crook Log, Bexleyheath	£1.04	£0.71	£3.24	£2.07	£2.44	£0.77	£0.00	£1.41	£11.67	£10.26
Lidl, Eynsham Drive, Abbey Wood	£2.70	£0.41	£0.00	£0.70	£0.00	£0.00	£0.16	£0.00	£3.97	£3.81
Other	£0.16	£0.10	£0.00	£1.85	£0.00	£0.00	£0.00	£0.00	£2.11	£2.11
ALL OUT OF CENTRE: SUB-TOTAL	£16.97	£12.45	£3.72	£7.22	£2.76	£0.77	£0.16	£1.41	£45.45	£43.88
BEXLEY BOROUGH TOTAL RETENTION:	£57.48	£102.81	£92.29	£76.50	£49.25	£89.46	£12.46	£19.69	£499.93	£467.79
OUTSIDE OF BOROUGH										
	£0.00	£0.00	£0.07	£0.26	£E 04	£17.67	£14.00	£3 50	£41.24	524.94
Tesco Superstore, Edgington Way, Foots Cray	£0.00	£0.00	£0.97	£0.26	£5.94	£17.67	£14.00	£2.50	£41.34	£24.84
Sainsbury's, Harow Mannor Way, Abbey Wood	£7.58	£0.87	£0.80	£0.00	£0.00	£0.14	£0.00	£0.00	£9.39	£9.39
Bromley	£0.00	£0.00	£0.00	£0.29	£0.10	£0.31	£2.70	£0.00	£3.41	£0.71
Dartford	£0.00	£2.07	£0.14	£1.55	£0.88	£0.11	£0.69	£7.22	£12.66	£4.76
Orpington	£0.00	£0.00	£0.00	£0.00	£0.11	£1.97	£48.20	£0.10	£50.36	£2.07
Thamesmead	£16.80	£1.07	£4.42	£1.10	£1.49	£1.44	£0.00	£0.00	£26.32	£26.32
Other	£1.31	£2.86	£2.83	£2.20	£4.24	£16.86	£44.66	£21.03	£95.98	£30.29
ALL OUT OF BOROUGH: SUB-TOTAL	£25.69	£6.87	£9.16	£5.40	£12.75	£38.50	£110.24	£30.84	£239.46	£98.37
STUDY AREA MARKET SHARE	£83.2	£109.7	£101.5	£81.9	£62.0	£128.0	£122.7	£50.5	£739.4	£566.2

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

									TOTAL CATCHMENT	BEXLEY BOROUGH
ZONE:	1	2	3	4	5	6	7	8	(STUDY) AREA	Zones 1-6
TOTAL AVAILABLE SPEND (excluding SFT	⊥ £85.6	ء £115.0	5 £105.3	4 £87.2	5 £64.2	6 £130.7	£124.1	e £52.5	£764.7	£588.1
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	£6.21	£15.60	£13.26	£19.48	£3.13	£8.68	£0.00	£0.73	£67.09	£66.36
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.10	£0.19	£0.00	£0.14	£0.00	£0.00	£0.43	£0.43
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.97	£0.30	£2.48	£0.91	£0.50	£0.09	£5.24	£4.66
Marks & Spencer, Broadway, Bexleyheath	£3.12	£2.92	£2.24	£2.10	£1.45	£2.47	£0.00	£0.20	£14.50	£14.30
Sainsbury's, Broadway, Bexleyheath	£4.83	£4.35	£3.68	£3.04	£0.80	£1.79	£0.00	£0.18	£18.68	£18.51
Other stores in Bexleyheath	£0.00	£1.21	£0.16	£0.76	£0.00	£0.31	£0.00	£0.08	£2.52	£2.44
BEXLEYHEATH: SUB-TOTAL	£14.17	£24.08	£20.41	£25.87	£7.85	£14.30	£0.50	£1.29	£108.47	£106.69
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	£0.00	£4.06	£1.27	£5.31	£5.93	£1.05	£0.15	£2.63	£20.39	£17.62
Iceland, Crayford Road, Crayford	£0.00	£0.12	£0.00	£0.00	£0.94	£0.00	£0.00	£0.00	£1.06	£1.06
Sainsbury's, Stadium Way, Crayford	£4.04	£12.63	£6.66	£12.36	£19.92	£3.26	£0.00	£10.13	£69.01	£58.88
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.21	£0.00
CRAYFORD: SUB-TOTAL	£4.04	£16.81	£7.93	£17.67	£26.80	£4.31	£0.15	£12.96	£90.66	£77.55
ERITH TOWN CENTRE	co 17	co 70	60.00	co oo	CO OO	60.00	CO CO	60.00	61.00	64.00
Farmfoods, Pier Road, Erith	£0.17	£0.73	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£1.00	£1.00
Iceland, Town Square, Erith	£0.00	£1.73	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£1.82	£1.82
Morrisons, James Watt Way, Erith	£9.86	£34.15	£0.43	£7.09	£1.44	£0.00	£0.00	£1.03	£54.00	£52.97
Local shops, Erith Town Centre ERITH: SUB-TOTAL	£0.14 £10.17	£0.28	£0.00 £0.43	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£0.42
SIDCUP TOWN CENTRE	£10.17	£36.90	£0.45	£7.27	£1.44	£0.00	£0.00	£1.03	£57.24	£56.21
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.10	£0.51	£0.18	£0.00	£0.79	£0.61
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£3.24	£0.50	£8.41	£0.17	£0.00	£12.33	£12.15
Morrisons, Jenner Close, Sidcup	£0.00	£0.00	£0.00	£0.09	£0.65	£30.54	£2.75	£0.00	£34.84	£31.85
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.65	£0.57	£0.00	£1.22	£0.65
SIDCUP: SUB-TOTAL	£0.00	£0.29	£0.28	£3.32	£1.25	£40.11	£3.68	£0.24	£49.18	£45.26
WELLING TOWN CENTRE	20.00	20.25	20.20	20102	11.20	110.11	20.00	20.21	215120	215120
Iceland, Welling High Street, Welling	£0.16	£0.00	£2.12	£0.00	£0.00	£0.00	£0.00	£0.00	£2.28	£2.28
Lidl, Upper Wickham Lane, Welling	£0.16	£0.12	£7.79	£0.09	£0.00	£0.00	£0.00	£0.10	£8.26	£8.16
Morrisons, Welling High Street, Welling	£1.05	£0.40	£16.46	£2.03	£0.09	£0.60	£0.00	£0.22	£20.86	£20.64
Tesco Superstore, Welling High Street, Welling	£0.81	£0.93	£16.72	£1.06	£0.85	£2.63	£0.50	£0.33	£23.83	£23.00
Local shops, Welling Town Centre	£0.00	£0.00	£1.13	£0.00	£0.00	£0.00	£0.00	£0.00	£1.13	£1.13
WELLING: SUB-TOTAL	£2.19	£1.44	£44.22	£3.18	£0.94	£3.24	£0.50	£0.65	£56.36	£55.21
DISTRICT CENTRES										
Belvedere	£10.05	£2.31	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£12.46	£12.46
Bexley	£0.00	£0.09	£0.53	£0.00	£1.72	£0.18	£0.00	£0.50	£3.01	£2.52
Blackfen	£0.00	£0.00	£0.71	£0.00	£0.00	£9.52	£0.00	£0.00	£10.23	£10.23
Northumberland Heath	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.10
ALL DISTRICT CENTRES: SUB-TOTAL	£10.05	£2.51	£1.34	£0.00	£1.72	£9.69	£0.00	£0.50	£25.81	£25.31
NEIGHBOURHOOD CENTRES	£1.10	£12.67	£17.33	£16.45	£8.14	£18.96	£7.62	£2.34	£84.62	£74.66
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	£13.46	£11.77	£0.50	£2.77	£0.34	£0.00	£0.00	£0.00	£28.83	£28.83
Asda, Crook Log, Bexleyheath	£1.07	£0.74	£3.36	£2.21	£2.52	£0.78	£0.00	£1.46	£12.15	£10.69
Lidl, Eynsham Drive, Abbey Wood	£2.78	£0.42	£0.00	£0.75	£0.00	£0.00	£0.16	£0.00	£4.11	£3.95
Other	£0.16	£0.11	£0.00	£1.97	£0.00	£0.00	£0.00	£0.00	£2.24	£2.24
ALL OUT OF CENTRE: SUB-TOTAL	£17.47	£13.04	£3.86	£7.69	£2.86	£0.78	£0.16	£1.46	£47.33	£45.71
BEXLEY BOROUGH TOTAL RETENTION:	£59.18	£107.76	£95.80	£81.45	£51.01	£91.40	£12.60	£20.47	£519.66	£486.60
	155.18	1107.76	199.80	101.45	151.01	191.40	1.12.00	120.47	1519.00	1400.00
OUTSIDE OF BOROUGH										
Tesco Superstore, Edgington Way, Foots Cray	£0.00	£0.00	£1.00	£0.27	£6.15	£18.06	£14.16	£2.59	£42.24	£25.49
Sainsbury's, Harow Mannor Way, Abbey Wood	£7.80	£0.91	£0.83	£0.00	£0.00	£0.14	£0.00	£0.00	£9.69	£9.69
Bromley	£0.00	£0.00	£0.00	£0.31	£0.11	£0.32	£2.73	£0.00	£3.47	£0.74
Dartford	£0.00	£2.17	£0.15	£1.65	£0.91	£0.12	£0.69	£7.50	£13.19	£5.00
Orpington	£0.00	£0.00	£0.00	£0.00	£0.11	£2.01	£48.73	£0.10	£50.95	£2.12
	£17.30	£1.12	£4.59	£1.17	£1.54	£1.47	£0.00	£0.00	£27.19	£27.19
Thamesmead		62.00	C2 0 4	C2 25	64.20	647.33	CAE 40	C24 24	COC 2C	624.24
Thamesmead Other ALL OUT OF BOROUGH: SUB-TOTAL	£1.35 £26.45	£3.00 £7.20	£2.94 £9.51	£2.35 £5.75	£4.39 £13.21	£17.22 £39.34	£45.16 £111.47	£21.86 £32.06	£98.26 £244.99	£31.24 £101.45

TABLE 6: 2038 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

ZONE:	1	2	3	4	5	6	7	8	TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH Zones 1-6
TOTAL AVAILABLE SPEND (excluding SFT	£89.8	£121.2	£106.9	£93.9	£66.6	£133.9	£129.3	£55.1	£796.7	£612.3
BEXLEYHEATH MAJOR CENTRE	105.0	1121.2	1100.9	195.9	100.0	1155.5	1129.5	135.1	£790.7	1012.5
Asda, The Broadway, Bexleyheath	£6.51	£16.45	£13.46	£20.99	£3.24	£8.89	£0.00	£0.77	£70.31	£69.54
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.10	£0.20	£0.00	£0.14	£0.00	£0.00	£0.45	£0.45
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.99	£0.32	£2.57	£0.93	£0.52	£0.10	£5.42	£4.81
Marks & Spencer, Broadway, Bexleyheath	£3.28	£3.08	£2.27	£2.26	£1.50	£2.53	£0.00	£0.21	£15.13	£14.92
Sainsbury's, Broadway, Bexleyheath	£5.07	£4.59	£3.74	£3.28	£0.83	£1.83	£0.00	£0.19	£19.53	£19.34
Other stores in Bexleyheath	£0.00	£1.28	£0.16	£0.81	£0.00	£0.32	£0.00	£0.09	£2.66	£2.57
BEXLEYHEATH: SUB-TOTAL	£14.86	£25.40	£20.72	£27.86	£8.14	£14.64	£0.52	£1.35	£113.50	£111.63
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	£0.00	£4.28	£1.28	£5.72	£6.15	£1.08	£0.15	£2.76	£21.42	£18.51
Iceland, Crayford Road, Crayford	£0.00	£0.12	£0.00	£0.00	£0.97	£0.00	£0.00	£0.00	£1.10	£1.10
Sainsbury's, Stadium Way, Crayford	£4.23	£13.32	£6.77	£13.32	£20.65	£3.34	£0.00	£10.63	£72.25	£61.62
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.22	£0.00
CRAYFORD: SUB-TOTAL	£4.23	£17.73	£8.05	£19.03	£27.77	£4.42	£0.15	£13.61	£94.99	£81.23
ERITH TOWN CENTRE	£0.18	£0.77	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£1.05	£1.05
Farmfoods, Pier Road, Erith										
Iceland, Town Square, Erith	£0.00	£1.83 £36.02	£0.00 £0.44	£0.09	£0.00	£0.00	£0.00	£0.00	£1.92	£1.92 £55.92
Morrisons, James Watt Way, Erith Local shops, Erith Town Centre	£10.34 £0.15	£36.02 £0.30	£0.44 £0.00	£7.64 £0.00	£1.49 £0.00	£0.00 £0.00	£0.00 £0.00	£1.08 £0.00	£57.00 £0.45	£55.92 £0.45
ERITH: SUB-TOTAL	£10.66	£38.92	£0.44	£7.83	£1.49	£0.00	£0.00	£1.08	£60.42	£59.34
SIDCUP TOWN CENTRE	110.00	130.52	10.44	17.05	11.45	10.00	10.00	11.00	200.42	233.54
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.10	£0.52	£0.19	£0.00	£0.81	£0.63
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£3.49	£0.52	£8.62	£0.18	£0.00	£12.81	£12.62
Morrisons, Jenner Close, Sidcup	£0.00	£0.31	£0.29	£0.09	£0.67	£31.28	£2.87	£0.25	£35.75	£32.63
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.60	£0.00	£1.26	£0.67
SIDCUP: SUB-TOTAL	£0.00	£0.31	£0.29	£3.58	£1.30	£41.08	£3.83	£0.25	£50.64	£46.55
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	£0.17	£0.00	£2.15	£0.00	£0.00	£0.00	£0.00	£0.00	£2.32	£2.32
Lidl, Upper Wickham Lane, Welling	£0.17	£0.12	£7.91	£0.09	£0.00	£0.00	£0.00	£0.10	£8.40	£8.30
Morrisons, Welling High Street, Welling	£1.10	£0.42	£16.71	£2.19	£0.10	£0.62	£0.00	£0.23	£21.37	£21.14
Tesco Superstore, Welling High Street, Welling	£0.85	£0.98	£16.98	£1.14	£0.88	£2.69	£0.52	£0.35	£24.39	£23.53
Local shops, Welling Town Centre	£0.00	£0.00	£1.14	£0.00	£0.00	£0.00	£0.00	£0.00	£1.14	£1.14
WELLING: SUB-TOTAL	£2.29	£1.52	£44.89	£3.43	£0.98	£3.31	£0.52	£0.68	£57.63	£56.43
DISTRICT CENTRES										
Belvedere	£10.54	£2.44	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£13.08	£13.08
Bexley	£0.00	£0.10	£0.53	£0.00	£1.78	£0.18	£0.00	£0.52	£3.12	£2.59
Blackfen	£0.00	£0.00	£0.72	£0.00	£0.00	£9.74	£0.00	£0.00	£10.47	£10.47
Northumberland Heath	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.11
ALL DISTRICT CENTRES: SUB-TOTAL	£10.54	£2.65	£1.36	£0.00	£1.78	£9.92	£0.00	£0.52	£26.77	£26.25
NEIGHBOURHOOD CENTRES	£1.16	£13.37	£17.59	£17.72	£8.44	£19.42	£7.94	£2.45	£88.09	£77.70
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	£14.11	£12.41	£0.50	£2.98	£0.35	£0.00	£0.00	£0.00	£30.36	£30.36
Asda, Crook Log, Bexleyheath	£1.12	£0.78	£3.41	£2.38	£2.62	£0.80	£0.00	£1.54	£12.65	£11.11
Lidl, Eynsham Drive, Abbey Wood	£2.91	£0.45	£0.00	£0.81	£0.00	£0.00	£0.17	£0.00	£4.34	£4.17
Other	£0.17	£0.11	£0.00	£2.12	£0.00	£0.00	£0.00	£0.00	£2.40	£2.40
ALL OUT OF CENTRE: SUB-TOTAL	£18.32	£13.76	£3.92	£8.28	£2.97	£0.80	£0.17	£1.54	£49.75	£48.04
BEXLEY BOROUGH TOTAL RETENTION:	£62.06	£113.65	£97.27	£87.74	£52.86	£93.60	£13.12	£21.49	£541.78	£507.17
OUTSIDE OF BOROUGH										
Tesco Superstore, Edgington Way, Foots Cray	£0.00	£0.00	£1.02	£0.30	£6.38	£18.49	£14.75	£2.72	£43.66	£26.18
Sainsbury's, Harow Mannor Way, Abbey Wood	£8.18	£0.96	£0.84	£0.00	£0.00	£0.14	£0.00	£0.00	£10.13	£10.13
Bromley	£0.00	£0.00	£0.00	£0.33	£0.11	£0.33	£2.85	£0.00	£3.62	£0.77
Dartford	£0.00	£2.29	£0.15	£1.78	£0.95	£0.12	£0.72	£7.88	£13.88	£5.28
Orpington	£0.00	£0.00	£0.00	£0.00	£0.11	£2.06	£50.77	£0.10	£53.05	£2.17
Thamesmead	£18.14	£1.18	£4.66	£1.26	£1.60	£1.51	£0.00	£0.00	£28.34	£28.34
Other	£1.41	£3.16	£2.98	£2.53	£4.55	£17.64	£47.04	£22.96	£102.27	£32.27
ALL OUT OF BOROUGH: SUB-TOTAL	£27.73	£7.60	£9.66	£6.19	£13.69	£40.28	£116.14	£33.66	£254.94	£105.15
	£89.8	£121.2	£106.9	£93.9	£66.6	£133.9	£129.3	£55.1	£796.7	£612.3

APPENDIX A6:

COMPARISON GOODS TURNOVER FORECASTS

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)

Excluding internet Shopping and i	ZONE:	1	2	3	4	5	6	7	8	CATCHMENT AREA (Zones 1-8)	BEXLEY BOROUGH (Zones 1-6)
Bexleyheath Strategic Centre		38.8%	35.5%	34.8%	46.9%	17.5%	19.5%	1.1%	5.0%	24.4%	31.4%
Crayford Major Town Centre		2.7%	7.3%	2.4%	4.5%	17.6%	3.3%	0.0%	8.3%	4.8%	5.5%
Erith Major Town Centre		2.1%	7.9%	0.0%	1.5%	0.2%	0.1%	0.0%	0.2%	1.5%	1.9%
Sidcup Major Town Centre		0.0%	0.1%	0.7%	0.2%	0.8%	13.4%	0.8%	1.0%	2.9%	3.6%
Welling Major Town Centre		1.1%	0.5%	10.6%	0.7%	0.3%	0.6%	0.1%	0.7%	1.9%	2.5%
DISTRICT CENTRES:											
Belvedere (Nuxley Road)		6.6%	1.3%	0.0%	1.7%	0.2%	0.0%	0.0%	0.0%	1.0%	1.4%
Bexley Village		0.4%	0.0%	0.0%	0.0%	1.3%	0.1%	0.0%	0.9%	0.2%	0.2%
Blackfen		0.0%	0.0%	0.1%	0.0%	0.0%	1.8%	0.0%	0.0%	0.4%	0.5%
Northumberland Heath		0.4%	2.6%	0.1%	0.4%	0.0%	0.0%	0.0%	0.1%	0.5%	0.6%
NEIGHBOURHOOD CENTRES:		0.2%	0.1%	0.1%	1.4%	0.2%	0.2%	0.0%	0.5%	0.3%	0.3%
OUT OF CENTRE:											
Crittals Corner Retail Park		0.7%	0.1%	1.2%	0.4%	1.9%	4.5%	2.4%	0.7%	1.8%	1.7%
Madford Retail Park		0.5%	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tower Retail Park		5.4%	6.9%	6.6%	7.2%	11.1%	2.2%	0.1%	9.7%	5.3%	6.0%
All Other Out of Centre in the Borough		6.3%	7.6%	2.7%	4.8%	0.2%	0.1%	0.0%	0.1%	2.6%	3.4%
OUT OF CENTRE: SUB-TOTAL		12.9%	14.7%	10.5%	12.6%	13.2%	6.7%	2.5%	10.5%	9.7%	11.2%
BEXLEY BOROUGH RETENTION LEVEL:		65.3%	69.9%	59.4%	69.8%	51.3%	45.7%	4.5%	27.3%	47.7%	59.2%
OUTSIDE OF BOROUGH:		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bluewater		14.4%	18.5%	27.1%	20.8%	32.2%	27.4%	10.6%	35.3%	22.3%	23.6%
Bromley		0.5%	0.4%	0.2%	0.5%	0.2%	3.9%	21.9%	0.5%	4.7%	1.2%
Dartford		2.7%	4.4%	1.4%	2.2%	8.4%	1.5%	0.4%	28.0%	4.4%	3.0%
Orpington		0.7%	0.9%	2.7%	1.3%	3.4%	10.1%	48.0%	1.9%	11.2%	3.8%
Thamesmead		7.2%	0.6%	1.5%	0.3%	0.0%	0.2%	0.0%	0.0%	1.1%	1.4%
Westfield Stratford		0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%
Other		9.2%	5.4%	7.8%	5.0%	4.5%	11.0%	14.6%	7.0%	8.7%	7.6%
OUTSIDE OF BOROUGH:		34.7%	30.1%	40.6%	30.2%	48.7%	54.3%	95.5%	72.7%	52.3%	40.8%
TOTAL MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES

Excluding Internet Shopping and other Special Forms of Trading BEXLEY CATCHMENT AREA ZONE: 8 BOROUGH (Zoi (Zones 1-8) 1-6) TOTAL AVAILABLE EXPENDITURE (£m): £132.5 £183.8 £176.4 £97.9 £137.9 £110.4 £83.1 £70.8 £745.6 £992.8 Bexleyheath Strategic Centre £38.0 £47.0 £48.0 £51.8 £14.6 £35.7 £1.9 £3.6 £240.6 £235.1 £47.1 £41.2 Crayford Major Town Centre £2.6 £9.6 £3.3 £14.7 £0.0 £5.9 £5.0 £6.0 Erith Major Town Centre £2.1 £10.5 £0.0 £1.6 £0.1 £0.1 £0.0 £0.1 £14.6 £14.5 Sidcup Major Town Centre £0.0 £0.1 £0.9 £0.2 £0.6 £24.7 £1.3 £0.7 £28.6 £26.6 £19.2 £18.6 Welling Major Town Centre £1.1 £0.7 £14.7 £0.8 £0.3 £1.1 £0.2 £0.5 DISTRICT CENTRES: £6.5 £1.7 £10.2 Belvedere (Nuxley Road) £0.0 £1.9 £0.1 £0.0 £0.0 £0.0 £10.2 Bexley Village £0.4 £0.0 £0.1 £0.0 £1.1 £0.2 £0.0 £0.7 £2.4 £1.8 Blackfen £0.0 £0.0 £0.1 £0.0 £0.0 £3.4 £0.0 £0.0 £3.5 £3.5 Northumberland Heath £0.4 £3.5 £0.1 £0.4 £0.0 £0.0 £0.1 £0.1 £4.5 £4.4 NEIGHBOURHOOD CENTRES: £0.2 £0.1 £0.1 £1.5 £0.2 £0.3 £0.1 £0.4 £2.8 £2.3 OUT OF CENTRE: Crittals Corner Retail Park £0.7 £0.2 £1.7 £0.4 £1.6 £8.2 £4.2 £0.5 £17.5 £12.8 Madford Retail Park £0.5 £0.1 £0.0 £0.3 £0.0 £0.0 £0.0 £0.0 £0.8 £0.8 Tower Retail Park £5.3 £9.1 £9.1 £8.0 £9.2 £4.0 £0.2 £6.9 £51.7 £44.7 All Other Out of Centre in the Borough £6.2 £10.1 £3.7 £5.3 £0.2 £0.2 £0.0 £0.1 £25.6 £25.5 OUT OF CENTRE: SUB-TOTAL £12.7 £19.5 £14.4 £14.0 £11.0 £12.4 £4.3 £7.5 £95.7 £83.9 BEXLEY BOROUGH RETENTION LEVEL: £64.0 £92.6 £81.9 £42.6 £84.0 £7.9 £19.3 £469.4 £442.1 OUTSIDE OF BOROUGH: £0.0 £0.0 £0.0 £0.0 £0.0 £0.0 £0.0 £0.0 £0.0 £0.0 Bluewater £14.1 £24.5 £37.3 £23.0 £26.7 £50.4 £18.8 £25.0 £219.8 £176.1 Bromley £0.5 £0.5 £0.3 £0.6 £0.2 £7.2 £38.6 £0.3 £48.1 £9.2 Dartford £2.6 £5.8 £1.9 £2.4 £6.9 £2.8 £0.8 £19.8 £43.1 £22.5 Orpington £0.7 £1.1 £3.8 £1.4 £2.8 £18.5 £84.7 £1.3 £114.3 £28.3 £7.1 £2.0 £0.0 Thamesmead £0.8 £0.4 £0.0 £0.4 £0.0 £10.7 £10.7 Westfield Stratford £0.0 £0.0 £0.0 £0.0 £0.1 £0.3 £0.0 £0.0 £0.4 £0.4 £10.7 £20.2 £25.8 £87.1 £56.3 Other £9.0 £7.2 £5.6 £3.7 £5.0 OUTSIDE OF BOROUGH: £33.9 £39.9 £168.5 £523.4 £56.0 £33.3 £40.5 £99.8 £51.4 £303.5 TOTAL MARKET SHARE: £97.9 £132.5 £137.9 £110.4 £83.1 £183.8 £176.4 £70.8 £992.8 £745.6

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH (Zone 1-6)
TOTAL AVAILABLE EXPENDITURE (£m):	£97.2	£132.9	£134.8	£109.8	£83.1	£178.4	£171.3	£70.3	£977.7	£736.1
Bexleyheath Strategic Centre	£37.7	£47.2	£46.9	£51.5	£14.6	£34.7	£1.9	£3.5	£238.0	£232.5
Crayford Major Town Centre	£2.6	£9.7	£3.3	£5.0	£14.7	£5.8	£0.0	£5.8	£46.8	£41.0
Erith Major Town Centre	£2.1	£10.5	£0.0	£1.6	£0.1	£0.1	£0.0	£0.1	£14.6	£14.5
Sidcup Major Town Centre	£0.0	£0.1	£0.9	£0.2	£0.6	£24.0	£1.3	£0.7	£27.8	£25.8
Welling Major Town Centre	£1.1	£0.7	£14.3	£0.8	£0.3	£1.1	£0.2	£0.5	£18.9	£18.2
DISTRICT CENTRES:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belvedere (Nuxley Road)	£6.4	£1.7	£0.0	£1.9	£0.1	£0.0	£0.0	£0.0	£10.2	£10.2
Bexley Village	£0.4	£0.0	£0.1	£0.0	£1.1	£0.2	£0.0	£0.7	£2.4	£1.7
Blackfen	£0.0	£0.0	£0.1	£0.0	£0.0	£3.3	£0.0	£0.0	£3.4	£3.4
Northumberland Heath	£0.4	£3.5	£0.1	£0.4	£0.0	£0.0	£0.1	£0.1	£4.5	£4.4
NEIGHBOURHOOD CENTRES:	£0.2	£0.1	£0.1	£1.5	£0.2	£0.3	£0.1	£0.4	£2.7	£2.3
DUT OF CENTRE:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crittals Corner Retail Park	£0.7	£0.2	£1.6	£0.4	£1.6	£8.0	£4.0	£0.5	£17.1	£12.5
Madford Retail Park	£0.4	£0.1	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8
Tower Retail Park	£5.3	£9.1	£8.9	£7.9	£9.2	£3.9	£0.2	£6.8	£51.3	£44.3
All Other Out of Centre in the Borough	£6.1	£10.1	£3.6	£5.2	£0.2	£0.1	£0.0	£0.1	£25.5	£25.4
OUT OF CENTRE: SUB-TOTAL	£12.6	£19.5	£14.1	£13.9	£11.0	£12.0	£4.2	£7.4	£94.7	£83.1
BEXLEY BOROUGH RETENTION LEVEL:	£63.5	£92.9	£80.0	£76.7	£42.6	£81.5	£7.7	£19.2	£464.1	£437.2
DUTSIDE OF BOROUGH:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Bluewater	£14.0	£24.6	£36.5	£22.8	£26.7	£49.0	£18.2	£24.8	£216.6	£173.6
Bromley	£0.5	£0.5	£0.3	£0.6	£0.2	£7.0	£37.5	£0.3	£46.7	£9.0
Dartford	£2.6	£5.9	£1.9	£2.4	£6.9	£2.7	£0.7	£19.7	£42.8	£22.4
Drpington	£0.7	£1.1	£3.7	£1.4	£2.8	£18.0	£82.2	£1.3	£111.2	£27.7
Fhamesmead	£7.0	£0.8	£2.0	£0.4	£0.0	£0.4	£0.0	£0.0	£10.5	£10.5
Westfield Stratford	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.4	£0.4
Other	£8.9	£7.2	£10.5	£5.5	£3.7	£19.6	£25.0	£4.9	£85.4	£55.4
DUTSIDE OF BOROUGH:	£33.7	£40.0	£54.8	£33.1	£40.5	£96.9	£163.6	£51.1	£513.7	£299.0
FOTAL MARKET SHARE:	£97.2	£132.9	£134.8	£109.8	£83.1	£178.4	£171.3	£70.3	£977.7	£736.1

TABLE 2:

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH (Zones 1-6)
TOTAL AVAILABLE EXPENDITURE (£m):	£112.3	£156.3	£157.9	£132.3	£98.2	£203.7	£194.4	£83.3	£1,138.4	£860.7
Bexleyheath Strategic Centre	£43.6	£55.5	£55.0	£62.0	£17.2	£39.6	£2.1	£4.2	£279.2	£272.9
Crayford Major Town Centre	£3.0	£11.4	£3.8	£6.0	£17.3	£6.6	£0.0	£6.9	£55.0	£48.1
Erith Major Town Centre	£2.4	£12.3	£0.0	£1.9	£0.2	£0.2	£0.0	£0.2	£17.2	£17.1
Sidcup Major Town Centre	£0.0	£0.2	£1.1	£0.2	£0.7	£27.4	£1.5	£0.8	£31.9	£29.6
Welling Major Town Centre	£1.3	£0.8	£16.8	£0.9	£0.3	£1.2	£0.2	£0.6	£22.1	£21.3
DISTRICT CENTRES:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belvedere (Nuxley Road)	£7.5	£2.0	£0.0	£2.3	£0.2	£0.0	£0.0	£0.0	£11.9	£11.9
Bexley Village	£0.5	£0.0	£0.1	£0.0	£1.3	£0.2	£0.0	£0.8	£2.8	£2.0
Blackfen	£0.0	£0.0	£0.2	£0.0	£0.0	£3.8	£0.0	£0.0	£3.9	£3.9
Northumberland Heath	£0.5	£4.1	£0.2	£0.5	£0.0	£0.0	£0.1	£0.1	£5.3	£5.2
NEIGHBOURHOOD CENTRES:	£0.2	£0.1	£0.1	£1.8	£0.2	£0.3	£0.1	£0.4	£3.3	£2.8
OUT OF CENTRE:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crittals Corner Retail Park	£0.8	£0.2	£1.9	£0.5	£1.9	£9.1	£4.6	£0.6	£19.7	£14.5
Madford Retail Park	£0.5	£0.1	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£1.0	£1.0
Tower Retail Park	£6.1	£10.7	£10.4	£9.6	£10.9	£4.4	£0.2	£8.1	£60.4	£52.1
All Other Out of Centre in the Borough	£7.1	£11.9	£4.2	£6.3	£0.2	£0.2	£0.0	£0.1	£30.0	£29.9
OUT OF CENTRE: SUB-TOTAL	£14.5	£22.9	£16.5	£16.7	£13.0	£13.7	£4.8	£8.8	£111.0	£97.5
BEXLEY BOROUGH RETENTION LEVEL:	£73.4	£109.2	£93.7	£92.4	£50.3	£93.1	£8.7	£22.8	£543.7	£512.2
OUTSIDE OF BOROUGH:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Bluewater	£16.2	£28.9	£42.8	£27.5	£31.6	£55.9	£20.7	£29.4	£252.9	£202.8
Bromley	£0.5	£0.6	£0.3	£0.7	£0.2	£8.0	£42.5	£0.4	£53.2	£10.3
Dartford	£3.0	£6.9	£2.2	£2.9	£8.2	£3.1	£0.8	£23.3	£50.4	£26.3
Orpington	£0.8	£1.3	£4.3	£1.7	£3.3	£20.5	£93.3	£1.6	£126.8	£32.0
Thamesmead	£8.1	£0.9	£2.3	£0.4	£0.0	£0.5	£0.0	£0.0	£12.2	£12.2
Westfield Stratford	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.4	£0.4
Other	£10.3	£8.4	£12.2	£6.7	£4.4	£22.4	£28.4	£5.8	£98.7	£64.5
OUTSIDE OF BOROUGH:	£38.9	£47.1	£64.2	£39.9	£47.8	£110.7	£185.6	£60.6	£594.8	£348.6
TOTAL MARKET SHARE:	£112.3	£156.3	£157.9	£132.3	£98.2	£203.7	£194.4	£83.3	£1,138.4	£860.7

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH (Zones 1-6)
TOTAL AVAILABLE EXPENDITURE (£m):	£130.3	£184.6	£184.7	£158.7	£114.6	£234.6	£221.5	£97.6	£1,326.6	£1,007.5
Bexleyheath Strategic Centre	£50.5	£65.5	£64.3	£74.4	£20.1	£45.6	£2.4	£4.9	£327.9	£320.5
Crayford Major Town Centre	£3.5	£13.4	£4.5	£7.2	£20.2	£7.7	£0.0	£8.1	£64.5	£56.4
Erith Major Town Centre	£2.8	£14.6	£0.0	£2.3	£0.2	£0.2	£0.0	£0.2	£20.3	£20.1
Sidcup Major Town Centre	£0.0	£0.2	£1.2	£0.3	£0.9	£31.5	£1.7	£1.0	£36.8	£34.1
Welling Major Town Centre	£1.5	£0.9	£19.6	£1.1	£0.4	£1.4	£0.2	£0.7	£25.8	£24.9
DISTRICT CENTRES:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belvedere	£8.6	£2.3	£0.0	£2.7	£0.2	£0.0	£0.0	£0.0	£13.9	£13.9
Bexley Village	£0.6	£0.0	£0.1	£0.0	£1.5	£0.2	£0.0	£0.9	£3.3	£2.4
Blackfen	£0.0	£0.0	£0.2	£0.0	£0.0	£4.3	£0.0	£0.0	£4.5	£4.5
Northumberland Heath	£0.5	£4.8	£0.2	£0.6	£0.0	£0.0	£0.1	£0.1	£6.3	£6.1
NEIGHBOURHOOD CENTRES:	£0.3	£0.1	£0.1	£2.2	£0.2	£0.4	£0.1	£0.5	£3.9	£3.3
OUT OF CENTRE:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Crittals Corner Retail Park	£0.9	£0.3	£2.3	£0.6	£2.2	£10.5	£5.2	£0.7	£22.7	£16.8
Madford Retail Park	£0.6	£0.2	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2
Tower Retail Park	£7.1	£12.7	£12.2	£11.5	£12.7	£5.1	£0.2	£9.5	£70.9	£61.2
All Other Out of Centre in the Borough	£8.2	£14.0	£4.9	£7.6	£0.2	£0.2	£0.0	£0.1	£35.3	£35.2
OUT OF CENTRE: SUB-TOTAL	£16.9	£27.1	£19.3	£20.1	£15.1	£15.8	£5.4	£10.3	£130.1	£114.3
BEXLEY BOROUGH RETENTION LEVEL:	£85.2	£129.0	£109.7	£110.8	£58.8	£107.2	£10.0	£26.7	£637.2	£600.6
OUTSIDE OF BOROUGH:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Bluewater	£18.8	£34.1	£50.0	£33.0	£36.9	£64.4	£23.5	£34.5	£295.2	£237.2
Bromley	£0.6	£0.7	£0.4	£0.9	£0.2	£9.2	£48.4	£0.5	£60.8	£11.9
Dartford	£3.5	£8.1	£2.6	£3.4	£9.6	£3.6	£0.9	£27.3	£59.1	£30.8
Orpington	£0.9	£1.6	£5.1	£2.1	£3.9	£23.6	£106.3	£1.9	£145.2	£37.1
Thamesmead	£9.4	£1.1	£2.7	£0.5	£0.0	£0.6	£0.0	£0.0	£14.3	£14.3
Westfield Stratford	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.5	£0.5
Other	£12.0	£10.0	£14.3	£8.0	£5.2	£25.8	£32.3	£6.9	£114.4	£75.2
OUTSIDE OF BOROUGH:	£45.2	£55.6	£75.1	£47.9	£55.8	£127.4	£211.5	£70.9	£689.4	£406.9
TOTAL MARKET SHARE:	£130.3	£184.6	£184.7	£158.7	£114.6	£234.6	£221.5	£97.6	£1.326.6	£1,007.5

TABLE 6: 2038 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES & STORES

ZONE:	1	2	3	4	5	6	7	8	STUDY AREA	BEXLEY BOROUGH (Zone 1-6)
TOTAL AVAILABLE EXPENDITURE (£m):	£163.5	£233.0	£224.4	£204.6	£142.1	£287.5	£276.1	£122.6	£1,653.9	£1,255.1
Bexleyheath Strategic Centre	£63.4	£82.7	£78.2	£96.0	£24.9	£55.9	£3.0	£6.2	£410.2	£401.0
Crayford Major Town Centre	£4.4	£16.9	£5.4	£9.2	£25.1	£9.4	£0.0	£10.1	£80.6	£70.4
Erith Major Town Centre	£3.5	£18.4	£0.1	£3.0	£0.3	£0.2	£0.0	£0.3	£25.7	£25.4
Sidcup Major Town Centre	£0.0	£0.2	£1.5	£0.3	£1.1	£38.6	£2.1	£1.2	£45.1	£41.8
Welling Major Town Centre	£1.8	£1.2	£23.8	£1.4	£0.4	£1.7	£0.3	£0.9	£31.6	£30.5
DISTRICT CENTRES:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Belvedere (Nuxley Road)	£10.9	£3.0	£0.0	£3.5	£0.3	£0.0	£0.0	£0.0	£17.6	£17.6
Bexley Village	£0.7	£0.0	£0.1	£0.0	£1.8	£0.3	£0.0	£1.1	£4.1	£3.0
Blackfen	£0.0	£0.0	£0.2	£0.0	£0.0	£5.3	£0.0	£0.0	£5.5	£5.5
Northumberland Heath	£0.7	£6.1	£0.2	£0.7	£0.0	£0.0	£0.1	£0.2	£8.0	£7.7
NEIGHBOURHOOD CENTRES:	£0.3	£0.2	£0.2	£2.8	£0.3	£0.4	£0.1	£0.6	£4.9	£4.2
OUT OF CENTRE:										
Crittals Corner Retail Park	£1.2	£0.3	£2.7	£0.8	£2.7	£12.9	£6.5	£0.9	£28.1	£20.6
Madford Retail Park	£0.8	£0.2	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£1.5	£1.5
Tower Retail Park	£8.9	£16.0	£14.8	£14.8	£15.8	£6.3	£0.3	£11.9	£88.7	£76.5
All Other Out of Centre in the Borough	£10.3	£17.7	£6.0	£9.8	£0.3	£0.2	£0.0	£0.1	£44.4	£44.3
OUT OF CENTRE: SUB-TOTAL	£21.1	£34.2	£23.5	£25.9	£18.8	£19.4	£6.8	£12.9	£162.6	£142.9
BEXLEY BOROUGH RETENTION LEVEL:	£106.9	£162.8	£133.2	£142.8	£72.9	£131.3	£12.4	£33.5	£795.9	£750.0
OUTSIDE OF BOROUGH:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Bluewater	£23.6	£43.1	£60.8	£42.5	£45.7	£78.9	£29.4	£43.3	£367.2	£294.5
Bromley	£0.8	£0.9	£0.5	£1.1	£0.3	£11.2	£60.4	£0.6	£75.7	£14.7
Dartford	£4.4	£10.3	£3.2	£4.4	£11.9	£4.4	£1.2	£34.3	£74.0	£38.5
Orpington	£1.1	£2.0	£6.1	£2.7	£4.8	£28.9	£132.5	£2.3	£180.5	£45.7
Thamesmead	£11.8	£1.4	£3.3	£0.7	£0.0	£0.7	£0.0	£0.0	£17.8	£17.8
Westfield Stratford	£0.0	£0.0	£0.0	£0.0	£0.2	£0.4	£0.0	£0.0	£0.6	£0.6
Other	£15.0	£12.6	£17.4	£10.3	£6.4	£31.6	£40.3	£8.6	£142.2	£93.3
OUTSIDE OF BOROUGH:	£56.7	£70.2	£91.2	£61.7	£69.2	£156.1	£263.7	£89.1	£858.0	£505.1
TOTAL MARKET SHARE:	£163.5	£233.0	£224.4	£204.6	£142.1	£287.5	£276.1	£122.6	£1,653.9	£1,255.1

APPENDIX A7: RETAIL COMMITMENTS

LONDON BOROUGH OF BEXLEY NEW RETAIL FLOORSPACE - COMMITMENTS AND PLANNED DEVELOPMENT: 2018 - 2021

LOCATION	IN / OUT OF PLANNING REF: CENTRE			UPDATE BY BEXLEY	ESTIMATE	D GROSS FL	OORSPACE	(sqm) ^{(1) / (2)}	2021: ES TURNOV	TIMATED ER (£m) ⁽³⁾		TIMATED /ER (£m)
LOCATION			DESCRIPTION OF DEVELOPMENT	BOROUGH COUNCIL @ MAY 2021	TOTAL	TOTAL RETAIL	FOOD	NON- FOOD	FOOD	NON- FOOD	FOOD	NON- FOOD
MAJOR COMMITMENTS 8	PLANN	ED DEVELOPME	NTS AT 2018									
Bexleyheath Former Civic Offices Broadway	IC	17/02745/FULM	Demolition of existing structures to provide 518 residential units and 3,150 sq m of flexible commercial floorspace comprising a mix of retail floorspace (Class A1 - A3); business (Class B1); leisure (Class D2) in new buildings, together with associated car parking and cycle storage, etc., and including the pedestrianisation of the northern section of Highlands Road.	Under construction	3,150	2,100	0	2,100			£0.0	£11.2
Erith Former Riverside Swimming Centre	IC	15/01084/FULM	Re-development of site to provide a mixed-use development comprising of 73 residential units (Class C3) and 139 square metres of flexible retail/commercial floorspace (Class A1-A3/B1/D1).	Completed 24 May 2019	139	28	0	28	£0.0	£0.1	£0.0	£0.1
Belvedere 28-32 Nuxley Rd	IC	16/02008/FULM	Redevelopment to provide a retail unit (Class A1) on the ground floor and 8 x 2 bed self-contained units on the first and second floors. Provision of car and cycle parking.	Completed 4 March 2020	274	274	0	274	£0.0	£1.2	£0.0	£1.5
Southmere Village Binsey Walk / Tavy Bridge	000	16/01251/FULM	Demolition of existing buildings to provide 525 new residential units and 3,691 sqm (GIA) of commercial floorspace with flexible A1-A3 floorspace, B1a (office), D1 (Non-residential institutions) and D2 (Assembly and leisure) and associated works.	Under construction	4,082	860	430	430			£3.3	£2.3
Abbey Wood Land to west Of Sedgemere Road And East Of Harrow Manorway London	000	16/01275/OUTM	Outline application for new residential development of up to 219 units and up to 3,225 sq metres of flexibly commercial floorspace and associated works.	Granted subject to S106 (Dec 2016) - Extant permission	3,225	1,935	968	968			£7.5	£5.2
Abbey Wood / Thamesmead Land At Coralline Walk Harrow Manorway	000	16/01288/OUTM	Outline application for demolition of existing buildings and hardstanding, residential development of upto 549 units and upto 3225 sq. metres of commercial floorspace and associated works	Granted subject to S106 (Dec 2016) - Extant permission	3,225	1,935	968	968			£7.5	£5.2
Thamsemead/Abbey Wood Land At Binsey Walk Adjacent To Harrow Manorway London	000	16/01287/OUTM	Outline application for new residential development of up to 329 units and up to 1,050 sq metres of commercial floorspace, with all matters reserved, and associated works.	Granted subject to S106 (Dec 2016) - Extant permission	1,050	630	315	315			£2.4	£1.7
MAJOR COMMITMENTS 8	PLANN	ED DEVELOPME	NTS - POST 2018									
Welling Lord Kitchener Public House 21 Wrotham Road DA16 1LS	000	19/01997/FULM	Change of use of the ground floor of the existing public house (A4) to retail (A1), conversion of the existing first and second floor and alterations and extensions including a two storey (with accommodation in the roof) rear extension to form 19 apartments comprising of 10 x 2 bed and 9 x 1 bed apartments with associated car and cycle parking.	Permission granted - 2021	404	404	202	202			£1.6	£1.1
Belvedere Clydesdale Way, DA17 6FD	000	19/02328/FUL	Change of use from Office unit (Class B1) to form two retails units (Class A1) including new shopfronts, external alterations and the creation of 11 car parking spaces.	Permission granted - 2019	960	960	480	480			£3.7	£2.6
TOTAL COMMITTED & PL4	NNED F	LOORSPACE:			16,509	9,126	3,362	5,764	£0.0	£1.4	£25.9	£30.8

Source: Bexley Borough Council (May 2021). (also refer to https://pa.bexley.gov.uk/online-applications/)

Notes: (1) Total floorspace estimates are derived from the planning application and the potential retail (previously defined as Class A1) floorspace that could be delivered. Where no split is provided, assumptions have necessarily been made as to the quantum of comparison and convenience floorspace that could be delivered.

(2) Assume net/gross floorspace ratio of 70% for convenience and comparison goods floorspace.

(3) Assume average sales density for new convenience and comparison goods floorspace of £11,000 per sqm and £6,500 sqm respectively in 2021 (2019 prices) based on average sales performance of existing and new floorspace. Allow for year-on-year growth in productivity of new floorspace over forecast period informed by latest Experian forecasts.

APPENDIX A8: RETAIL CAPACITY FORECASTS – GLA PROJECTIONS

CONVENIENCE GOODS CAPACITY - GLA

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

Excluding SFT & 'Inflow' from outside Study Area

	2018	2021	2026	2028	2038
BEXLEYHEATH - STRATEGIC CENTRE	£97.3	99.7	104.0	108.5	113.5
CRAYFORD -MAJOR DISTRICT CENTRE	£80.4	82.9	86.9	90.7	95.0
ERITH - MAJOR DISTRICT CENTRE	£50.6	£52.4	£54.7	£57.2	£60.4
SIDCUP - MAJOR DISTRICT CENTRE	£46.8	£47.2	£48.0	£49.2	£50.6
WELLING - MAJOR DISTRICT CENTRE	£51.5	£52.2	£54.3	£56.4	£57.6
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£326.6	£334.4	£347.9	£361.9	£377.2
BELVEDERE DISTRICT CENTRE	£11.4	£11.7	£12.1	£12.5	£13.1
BEXLEY DISTRICT CENTRE	£2.7	£2.8	£2.9	£3.0	£3.1
BLACKFEN DISTRICT CENTRE	£9.8	£9.8	£10.0	£10.2	£10.5
NORTHUMBERLAND HEATH DISTRICT CENTRE	£0.1	£0.1	£0.1	£0.1	£0.1
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£24.0	£24.4	£25.1	£25.8	£26.8
NEIGHBOURHOOD CENTRES	£77.0	£78.6	£81.5	£84.6	£88.1
ALL OUT OF CENTRE STORES	£42.4	£43.7	£45.4	£47.3	£49.7
TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORES IN BOROUGH AREA:	£469.9	£481.1	£499.9	£519.7	£541.8

Notes: Assume constant market shares over forecast period.

TABLE 2: ALL CONVENIENCE GOODS - TOTAL TURNOVER Including 'Inflow' from outside Study Area

Including 'Inflow' from outside Study Area	8					
	Estimated 'Inflow' from outside Study Area	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	20%	£121.6	£124.7	£130.0	£135.6	£141.9
CRAYFORD -MAJOR DISTRICT CENTRE	15%	£94.6	£97.5	£102.2	£106.7	£111.8
ERITH - MAJOR DISTRICT CENTRE	10%	£56.2	£58.2	£60.8	£63.6	£67.1
SIDCUP - MAJOR DISTRICT CENTRE	15%	£55.0	£55.5	£56.5	£57.9	£59.6
WELLING - MAJOR DISTRICT CENTRE	25%	£68.6	£69.6	£72.4	£75.1	£76.8
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:		£396.1	£405.5	£421.9	£438.9	£457.2
BELVEDERE DISTRICT CENTRE	5%	£12.0	£12.3	£12.7	£13.1	£13.8
BEXLEY DISTRICT CENTRE	5%	£2.8	£2.9	£3.1	£3.2	£3.3
BLACKFEN DISTRICT CENTRE	5%	£10.3	£10.4	£10.5	£10.8	£11.0
NORTHUMBERLAND HEATH DISTRICT CENTRE	5%	£0.1	£0.1	£0.1	£0.1	£0.1
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:		£25.2	£25.7	£26.4	£27.2	£28.2
NEIGHBOURHOOD CENTRES	5%	£81.1	£82.7	£85.8	£89.1	£92.7
ALL OUT OF CENTRE STORES	15%	£49.9	£51.4	£53.5	£55.7	£58.5
TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORES IN BOROUGH AREA:		£552.3	£565.3	£587.5	£610.8	£636.6

Notes: Estimates as to the potential 'inflow' of turnover from outside the Study Area to key centres and stores is based on available research and informed judgements.

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE (1)

	COMMITTED RETA	AVERAGE SALES	I	FORECAST TURNOVER (£M)			
LOCATION:	Gross (sqm)	Net (sqm)	DENSITY (£/sqm)	2021	2026	2026 2031 £0.0 £0.0 £25.9 £26.3 £25.9 £26.3	2038
TOWN CENTRE LOCATIONS:	0	0	£11,000	£0.0	£0.0	£0.0	£0.0
OUT OF CENTRE LOCATIONS:	3,362	2,353	£11,000	£0.0	£25.9	£26.3	£26.9
TOTAL	3,362	2,353		£0.0	£25.9	£26.3	£26.9
Notes: (1) Retail floorspace with planning permission and/or under construction	at the time of prepar	ing the capacity asse	ssment. It is ass	umed for the	e purpose of t	his assessme	nt that all

tes: (1) Retail floorspace with planning permission and/or under construction at the time of preparing the capacity assessment. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

(2) Where the exact floorspace and split between comparison/convenience sales areas are not been specified by planning permission, LSH has necessarily estimated the likely sales figures based on the available evidence and informed judgements.

TABLE 4: BEXLEY BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2021	2026	2031	2038
STEP 1: STEP 2:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£565.3 £565.3	£587.5 £576.1	£610.8 £584.8	£636.6 £597.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£11.4	£25.9	£39.4
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£25.9	£26.3	£26.9
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	£0.0	-£14.5	-£0.4	£12.5
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: (i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£11,211	£11,380	£11,621
	(ii) Net Floorspace Capacity (sq m):	0	-1,296	-34	1,075
	(iii) Assumed Net / Gross Floorsp It has been a+F74ssumed for the purpose of this assessment that the LPA's convenience retail ma	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	-1,851	-49	1,536

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

STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.

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

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

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

STEPS 6 & 7:+C The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

COMPARISON GOODS CAPACITY - GLA

TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m) Excluding SFT & 'Inflow' from outside Study Area

Excluding SFT & Inflow from outside Study Ared					
	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	£240.6	238.0	279.2	327.9	410.2
CRAYFORD -MAJOR DISTRICT CENTRE	£47.1	46.8	55.0	64.5	80.6
ERITH - MAJOR DISTRICT CENTRE	£14.6	14.6	17.2	20.3	25.7
SIDCUP - MAJOR DISTRICT CENTRE	£28.6	27.8	31.9	36.8	45.1
WELLING - MAJOR DISTRICT CENTRE	£19.2	18.9	22.1	25.8	31.6
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:		£346.1	£405.4	£475.2	£593.2
BELVEDERE DISTRICT CENTRE	£10.2	£10.2	11.9	£13.9	£17.6
BEXLEY DISTRICT CENTRE	£2.4	£2.4	2.8	£3.3	£4.1
BLACKFEN DISTRICT CENTRE	£3.5	£3.4	3.9	£4.5	£5.5
NORTHUMBERLAND HEATH DISTRICT CENTRE	£4.5	£4.5	5.3	£6.3	£8.0
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOC	ATED: £20.7	£20.5	£24.0	£28.0	£35.2
NEIGHBOURHOOD CENTRES	£2.8	£2.7	£3.3	£3.9	£4.9
OUT OF CENTRE RETAIL PARKS & STORES:					
Crittals Corne	r Retail Park £17.5	£17.1	£19.7	£22.7	£28.1
Tower Retail	Park £51.7	£51.3	£60.4	£70.9	£88.7
Other out of	entre £26.4	£26.3	£30.9	£36.4	£45.9
TOTAL SURVEY-DERIVED TURNOVER	£469.4	£464.1	£543.7	£637.2	£795.9

Notes: Assume constant market shares over forecast period.

TABLE 2: TOTAL COMPARISON GOODS TURNOVER (£m)

Including	'Inflow'	from a	outside	Study Area	
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	'Inflow' from outside Study Area	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	20%	£300.8	£297.4	£349.0	£409.8	£512.8
CRAYFORD -MAJOR DISTRICT CENTRE	20%	£58.8	£58.5	£68.8	£80.6	£100.7
ERITH - MAJOR DISTRICT CENTRE	15%	£17.2	£17.2	£20.3	£23.9	£30.2
SIDCUP - MAJOR DISTRICT CENTRE	20%	£35.8	£34.8	£39.9	£46.0	£56.4
WELLING - MAJOR DISTRICT CENTRE	20%	£24.0	£23.6	£27.6	£32.3	£39.5
TOWN CENTRES: TOTAL TURNOVER:		£436.7	£431.5	£505.5	£592.6	£739.7
BELVEDERE DISTRICT CENTRE	5%	£10.8	£10.7	£12.5	£14.6	£18.5
BEXLEY DISTRICT CENTRE	5%	£2.5	£2.5	£3.0	£3.5	£4.3
BLACKFEN DISTRICT CENTRE	5%	£3.7	£3.6	£4.1	£4.8	£5.8
NORTHUMBERLAND HEATH DISTRICT CENTRE	5%	£4.8	£4.8	£5.6	£6.6	£8.4
DISTRICT CENTRES: TOTAL TURNOVER:	,	£21.8	£21.6	£25.2	£29.5	£37.0
NEIGHBOURHOOD CENTRES	5%	£2.9	£2.9	£3.4	£4.1	£5.1
OUT OF CENTRE RETAIL PARKS & STORES:						
Crittals Corner Retail Park	10%	£19.5	£19.0	£21.9	£25.2	£31.2
Tower Retail Park	20%	£64.7	£64.1	£75.5	£88.6	£110.8
Other out of centre	10%	£29.4	£29.2	£34.4	£40.5	£51.0
TOTAL TURNOVERS OF CENTRES/STORES IN BEXLEY BOROUGH:		£574.9	£568.4	£665.9	£780.5	£974.8

Notes: Estimates as to the potential 'inflow' of turnover from outside the Study Area to key centres and stores is based on available research and informed judgements.

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE (1)

LOCATION:	COMMITTED RET (SQM		2021: AVERAGE SALES DENSITY (£/sqm)		RNOVER (£M)		
	Gross	Net		2021	2026	2031	2038
TOWN CENTRE LOCATIONS:	2,402	1,681	£6,500	£1.4	£12.9	£14.8	£18.1
OUT OF CENTRE LOCATIONS:	6,724	2,353	£6,500	£0.0	£18.0	£20.8	£25.4
TOTAL	9,126	4,035		£1.4	£30.8	£35.6	£43.5
Notes: (1) Retail floorspace with planning permission and	/or under constru	iction at the tim	he of preparing the	canacity asse	ssment It is as	sumed for the	nurnose of

(1) Retail floorspace with planning permission and/or under construction at the time of preparing the capacity assessment. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

(2) Where the exact floorspace and split between comparison/convenience sales areas are not been specified by planning permission, LSH has necessarily estimated the likely sales figures based on the available evidence and informed judgements.

TABLE 4: BEXLEY COUNCIL LOCAL AUTHORITY AREA - COMPARISON GOODS CAPACITY ASSESSMENT

		2021	2026	2031	2038
STEP 1: STEP 2:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£568.4 £568.4	£665.9 £668.5	£780.5 £772.0	£974.8 £943.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£2.6	£8.5	£31.8
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£1.4	£30.8	£35.6	£43.5
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-£1.4	-£33.4	-£27.1	-£11.7
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: (i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,500	£7,645	£8,828	£10,784
	(ii) Net Floorspace Capacity (sq m): -	-211	-4,373	-3,069	-1,084
	(iii) Assumed Net / Gross Floorspace Ratio: -	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-302	-6,247	-4,384	-1,548

Assume Equilibrium at Base Year and Constant Market Shares

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

It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers STEP 2: are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing* and other research evidence.

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

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

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

The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an assumed average trading density for 'High Street' STEP 6 : comparison goods retailers. Please note that trading densities will be lower for retail formats selling traditional bulky goods products e.g. DIY, garden products, furniture and flooring.

APPENDIX A9: RETAIL CAPACITY FORECASTS – BGS PROJECTIONS

CONVENIENCE GOODS CAPACITY - BEXLEY GROWTH STRATEGY

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

Excluding SFT & 'Inflow' from outside Study Area

	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	£94.7	£95.9	£100.2	£107.7	£124.1
CRAYFORD -MAJOR DISTRICT CENTRE	£78.7	£80.2	£83.0	£88.2	£99.7
ERITH - MAJOR DISTRICT CENTRE	£49.2	£50.8	£55.1	£62.2	£81.0
SIDCUP - MAJOR DISTRICT CENTRE	£45.6	£45.6	£46.1	£46.7	£47.6
WELLING - MAJOR DISTRICT CENTRE	£50.1	£50.0	£50.7	£52.1	£54.0
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£318.2	£322.4	£335.1	£356.8	£406.4
BELVEDERE DISTRICT CENTRE	£11.0	£11.3	£12.6	£14.7	£19.1
BEXLEY DISTRICT CENTRE	£2.6	£2.7	£2.7	£2.8	£3.0
BLACKFEN DISTRICT CENTRE	£9.5	£9.5	£9.6	£9.7	£9.8
NORTHUMBERLAND HEATH DISTRICT CENTRE	£0.1	£0.1	£0.1	£0.1	£0.2
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£23.2	£23.6	£25.0	£27.3	£32.1
NEIGHBOURHOOD CENTRES	£75.2	£75.8	£77.7	£81.1	£88.5
ALL OUT OF CENTRE STORES	£41.2	£42.1	£45.3	£50.7	£62.6
TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORES IN BOROUGH AREA:	£457.9	£464.0	£483.2	£515.9	£589.5

Notes: Assume constant market shares over forecast period.

TABLE 2: ALL CONVENIENCE GOODS - TOTAL TURNOVER

Including 'Inflow' from outside Study Area	Including	'Inflow'	from outside Study Area	
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	Estimated 'Inflow' from outside Study Area	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	20%	£118.4	£119.9	£125.2	£134.7	£155.1
CRAYFORD -MAJOR DISTRICT CENTRE	15%	£92.5	£94.3	£97.7	£103.7	£117.2
ERITH - MAJOR DISTRICT CENTRE	10%	£54.6	£56.4	£61.2	£69.1	£90.0
SIDCUP - MAJOR DISTRICT CENTRE	15%	£53.6	£53.6	£54.3	£54.9	£56.0
WELLING - MAJOR DISTRICT CENTRE	25%	£66.8	£66.7	£67.5	£69.4	£72.0
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED):	£386.0	£390.9	£406.0	£431.8	£490.4
BELVEDERE DISTRICT CENTRE	5%	£11.6	£11.9	£13.3	£15.5	£20.1
BEXLEY DISTRICT CENTRE	5%	£2.8	£2.8	£2.9	£3.0	£3.2
BLACKFEN DISTRICT CENTRE	5%	£10.0	£10.0	£10.1	£10.2	£10.3
NORTHUMBERLAND HEATH DISTRICT CENTRE	5%	£0.1	£0.1	£0.1	£0.1	£0.2
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCAT	ED:	£24.5	£24.8	£26.4	£28.7	£33.8
NEIGHBOURHOOD CENTRES	5%	£79.2	£79.8	£81.8	£85.4	£93.1
ALL OUT OF CENTRE STORES	15%	£48.5	£49.5	£53.4	£59.7	£73.7
TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORE	TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORES IN BOROUGH AREA:		£545.1	£567.5	£605.6	£690.9

Notes: Estimates as to the potential 'inflow' of turnover from outside the Study Area to key centres and stores is based on available research and informed judgements.

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE (1)

	COMMITTED RETA	NIL FLOORSPACE ⁽²⁾	AVERAGE						
LOCATION:	Gross (sqm)	Net (sqm)	SALES DENSITY (£/sqm)	2021	2026	2031	2038		
TOWN CENTRE LOCATIONS:	0	0	£11,000	£0.0	£0.0	£0.0	£0.0		
OUT OF CENTRE LOCATIONS:	3,362	2,353	£11,000	£0.0	£25.9	£26.3	£26.9		
TOTAL	3,362	2,353		£0.0	£25.9	£26.3	£26.9		

Notes: (1) Retail floorspace with planning permission and/or under construction at the time of preparing the capacity assessment. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

(2) Where the exact floorspace and split between comparison/convenience sales areas are not been specified by planning permission, LSH has necessarily estimated the likely sales figures based on the available evidence and informed judgements.

TABLE 4: BEXLEY BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume E	quilibrium at Base	e Year and	Constant	Market Shares
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	2021	2026	2031	2038
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£545.1	£567.5	£605.6	£690.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£545.1	£555.5	£563.9	£575.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£11.9	£41.7	£115.1
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£25.9	£26.3	£26.9
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	£0.0	-£14.0	£15.3	£88.2
STEP 6: FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£11,211	£11,380	£11,621
(ii) Net Floorspace Capacity (sq m):	0	-1,250	1,347	7,587
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	0	-1,785	1,924	10,839

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

- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket/ limited assortment discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

CONVENIENCE GOODS CAPACITY - BEXLEY GROWTH STRATEGY

Excluding SFT & 'Inflow' from outside Study Area					
	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	£234.2	£228.8	£269.5	£326.8	£449.6
CRAYFORD -MAJOR DISTRICT CENTRE	£46.0	£45.3	£52.9	£63.3	£86.4
ERITH - MAJOR DISTRICT CENTRE	£14.2	£14.2	£17.4	£22.1	£34.8
SIDCUP - MAJOR DISTRICT CENTRE	£27.9	£26.9	£30.7	£34.9	£42.5
WELLING - MAJOR DISTRICT CENTRE	£18.7	£18.1	£20.7	£24.1	£30.2
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£341.0	£333.3	£391.2	£471.2	£643.6
BELVEDERE DISTRICT CENTRE	£9.9	£9.8	£12.1	£15.6	£23.5
BEXLEY DISTRICT CENTRE	£2.4	£2.3	£2.7	£3.3	£4.3
BLACKFEN DISTRICT CENTRE	£3.4	£3.3	£3.8	£4.3	£5.2
NORTHUMBERLAND HEATH DISTRICT CENTRE	£4.4	£4.4	£5.4	£6.8	£10.8
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£20.1	£19.8	£24.0	£30.0	£43.8
NEIGHBOURHOOD CENTRES	£2.7	£2.6	£3.1	£3.6	£4.7
OUT OF CENTRE RETAIL PARKS & STORES:					
Crittals Corner Retail Park	£17.2	£16.6	£19.0	£21.9	£27.4
Tower Retail Park	£50.5	£49.6	£58.2	£69.9	£95.1
Other out of centre	£25.7	£25.3	£30.6	£38.4	£56.8
TOTAL SURVEY-DERIVED TURNOVER	£457.3	£447.3	£526.0	£635.0	£871.3

TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)

Notes: Assume constant market shares over forecast period.

TABLE 1:

TABLE 2: TOTAL COMPARISON GOODS TURNOVER (£m) Including 'Inflow' from outside Study Area

Including Inflow from outside Study Area						
	'Inflow' from outside Study Area	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	20%	£292.8	£286.0	£336.9	£408.5	£562.0
CRAYFORD -MAJOR DISTRICT CENTRE	20%	£57.5	£56.6	£66.2	£79.1	£108.1
ERITH - MAJOR DISTRICT CENTRE	15%	£16.7	£16.7	£20.5	£26.0	£41.0
SIDCUP - MAJOR DISTRICT CENTRE	20%	£34.9	£33.6	£38.4	£43.7	£53.2
WELLING - MAJOR DISTRICT CENTRE	20%	£23.4	£22.6	£25.9	£30.1	£37.7
TOWN CENTRES: TOTAL TURNOVER:		£425.3	£415.6	£487.7	£587.4	£801.9
BELVEDERE DISTRICT CENTRE	5%	£10.4	£10.3	£12.7	£16.4	£24.7
BEXLEY DISTRICT CENTRE	5%	£2.5	£2.5	£2.9	£3.4	£4.6
BLACKFEN DISTRICT CENTRE	5%	£3.6	£3.5	£4.0	£4.5	£5.5
NORTHUMBERLAND HEATH DISTRICT CENTRE	5%	£4.6	£4.6	£5.7	£7.2	£11.3
DISTRICT CENTRES: TOTAL TURNOVER:		£21.2	£20.9	£25.2	£31.5	£46.1
NEIGHBOURHOOD CENTRES	5%	£2.9	£2.8	£3.2	£3.8	£4.9
OUT OF CENTRE RETAIL PARKS & STORES:						
Crittals Corner Retail Park	10%	£19.1	£18.5	£21.1	£24.4	£30.5
Tower Retail Park	20%	£63.2	£62.0	£72.7	£87.4	£118.8
Other out of centre	10%	£28.5	£28.1	£34.0	£42.6	£63.1
TOTAL TURNOVERS OF CENTRES/STORES IN BEXLEY BOROUGH:		£560.1	£547.8	£644.0	£777.1	£1,065.3

Notes: Estimates as to the potential 'inflow' of turnover from outside the Study Area to key centres and stores based on available research and informed judgements.

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE (1)

LOCATION:	COMMITT FLOORSPAC		2021: AVERAGE	FC	ORECAST TUR	NOVER (£M)	
	Gross Net		SALES DENSITY (£/sqm)	2021	2026	2031	2038
TOWN CENTRE LOCATIONS:	2,402	1,681	£6,500	£1.4	£12.9	£14.8	£18.1
OUT OF CENTRE LOCATIONS:	6,724	2,353	£6,500	£0.0	£18.0	£20.8	£25.4
TOTAL	9,126	4,035		£1.4	£30.8	£35.6	£43.5

Notes: (1) Retail floorspace with planning permission and/or under construction at the time of preparing the capacity assessment. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

(2) Where the exact floorspace and split between comparison/convenience sales areas are not been specified by planning permission, LSH has necessarily estimated the likely sales figures based on the available evidence and informed judgements.

TABLE 4: BEXLEY POPULATION GROWTH STRATEGY

COMPARISON GOODS CAPACITY ASSESSMENT - LOCAL AUTHORITY AREA

Assume Equilibrium at Base	Year and Constant Market Shares
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		2021	2026	2031	2038
STEP 1: STEP 2:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ :	£547.8 £547.8	£644.0 £644.4	£777.1 £744.1	£1,065.3 £908.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£0.3	£33.1	£156.4
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£1.4	£30.8	£35.6	£43.5
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-£1.4	-£31.2	-£2.6	£112.9
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: (i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,500	£7,645	£8,828	£10,784
	(ii) Net Floorspace Capacity (sq m): -	-211	-4,078	-291	10,466
	(iii) Assumed Net / Gross Floorspace Ratio: -	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-302	-5,826	-415	14,951

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

STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note* and other research evidence.

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

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2026.

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

STEP 6 : The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an assumed average trading density for 'High Street' comparison goods retailers. Please note that trading densities will be lower for retail formats selling traditional bulky goods products e.g. DIY, garden

APPENDIX A10: HOUSING GROWTH AREAS – RETAIL CAPACITY FORECASTS

HOUSING GROWTH AREAS - POPULATION, EXPENDITURE & CONVENIENCE GOODS CAPACITY FORECASTS

1. POPULATION & CONVENIENCE GOODS EXPENDITURE PROJECTIONS (2018-2038)

TABLE 1.1 LOWER BELVEDERE GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Lower Belvedere (1)	490	505	1,362	4,106	12,376
Population - sites within Thamesmead East New Development Area (2)	7	7	990	2,261	3,571
Total Population Uplift	497	512	2,351	6,367	15,947
Average Convenience Expenditure (£ per capita) (3)	£2,006	£1,999	£1,990	£1,989	£1,997
Available Expenditure (£m) (4)	£1.0	£1.0	£4.7	£12.7	£31.8

Sources & Notes: (1) Forecast population growth for Lower Belvedere derived from Bexley Growth Strategy and planned housing allocations.

(2) The population from proposed housing sites in the Thamesmead ward is allocated on a 50:50 basis between Belvedere and Wilton Road/ Abbey Wood

(3) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 1 (the Belvedere Zone). All expenditure figures exclude spend on Special Forms of Trading, which includes online purchases not sourced directly from "physical" stores. All expenditure and turnover figures are expressed in 2019 prices.

(4) Total available expenditure is derived by muliplying the total population with the average expenditure per capita

TABLE 1.2 SLADE GREEN GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Slade Green Growth Area (1)	14	14	1,729	7,394	19,636
Average Convenience Expenditure (£ per capita) (2)	£2,063	£2,056	£2,046	£2,046	£2,054
Available Expenditure (£m)	£0.03	£0.03	£3.5	£15.1	£40.3

Sources & Notes: (1) Forecast population growth for Slade Green derived from Bexley Growth Strategy and planned housing allocations. (2) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 2.

TABLE 1.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Lesnes Valley New Development (1)	388	1,410	3,545	6,033	6,916
Population Projections - Thamesmead East New Development Area (2)	7	7	990	2,261	3,571
Total Population Uplift	395	1,417	4,534	8,294	10,486
Average Convenience Expenditure (£ per capita)	£2,006	£1,999	£1,990	£1,989	£1,997
Available Expenditure (£m)	£0.8	£2.8	£9.0	£16.5	£20.9

Sources & Notes:

(1) Forecast population growth for Lesnes Valley Development derived from Bexley Growth Strategy and planned housing allocations.

(2) Average expenditure is derived from the Experian-based average expenditure for Zone 1.

2. CONVENIENCE GOODS CAPACITY:

TABLE 2.1 LOWER BELVEDERE GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	50.0%	50.0%	65.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£2.34	£6.33	£20.70
Assumed "inflow" / trade draw from outside growth area (3):	10%	£0.00	£2.60	£7.03	£23.00
FORECAST CONVENIENCE GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£11,000	£11,211	£11,380	£11,621
NET FLOORSPACE CAPACITY (sq metres) (5)		0	232	618	1,979
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	331	883	2,828

TABLE 2.2 SLADE GREEN GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	0.0%	15.0%	20.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£0.00	£2.27	£8.07
Assumed "inflow" / trade draw from outside growth area (3):	5%	£0.00	£0.00	£2.39	£8.49
FORECAST CONVENIENCE GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£11,000	£11,211	£11,380	£11,621
NET FLOORSPACE CAPACITY (sq metres) (5)		0	0	210	731
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	0	300	1,044

TABLE 2.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	60.0%	65.0%	65.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£5.41	£10.72	£13.61
Assumed "inflow" / trade draw from outside growth area (3):	20%	£0.00	£6.77	£13.40	£17.02
FORECAST CONVENIENCE GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£11,000	£11,211	£11,380	£11,621
NET FLOORSPACE CAPACITY (sq metres) (5)		0	604	1,178	1,464
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	862	1,683	2,092

HOUSING GROWTH AREAS - POPULATION, EXPENDITURE & COMPARISON GOODS CAPACITY FORECASTS

1. POPULATION & COMPARISON GOODS EXPENDITURE PROJECTIONS (2018-2038)

	2018	2021	2026	2031	2038
Population Projections - Lower Belvedere (1)		505	1,362	4,106	12,376
Population - sites within Thamesmead East New Development Area (2)		7	990	2,261	3,571
Total Population Uplift	497	512	2,351	6,367	15,947
Average Comparison Expenditure (£ per capita) (3)	£2,492	£2,396	£2,687	£3,027	£3,638
Available Expenditure (£m) (4)	£1.2	£1.2	£6.3	£19.3	£58.0

TABLE 1.1 I OWER BELVEDERE GROWTH AREA

Sources & Notes: (1) Forecast population growth for Lower Belvedere derived from Bexley Growth Strategy and planned housing allocations.

(2) The population from proposed housing sites in the Thamesmead ward is allocated on a 50:50 basis between Belvedere and Wilton Road/ Abbey Wood

(3) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 1 (the Belvedere Zone). All expenditure figures exclude spend on Special Forms of Trading, which includes online purchases not sourced directly from "physical" stores. All expenditure and turnover figures are expressed in 2019 prices.

(4) Total available expenditure is derived by muliplying the total population with the average expenditure per capita

TABLE 1.2 SLADE GREEN GROWTH AREA

2018	2021	2026	2031	2038
14	14	1,729	7,394	19,636
£2,704	£2,600	£2,916	£3,285	£3,947
£0.04	£0.04	£5.0	£24.3	£77.5
	14 £2,704	14 14 £2,704 £2,600	14 14 1,729 £2,704 £2,600 £2,916	14 14 1,729 7,394 £2,704 £2,600 £2,916 £3,285

Sources & Notes:(1) Forecast population growth for Slade Green derived from Bexley Growth Strategy and planned housing allocations.(2) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 2.

TABLE 1.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Lesnes Valley New Development (1)		1,410	3,545	6,033	6,916
Population Projections - Thamesmead East New Development Area (2)		7	990	2,261	3,571
Total Population Uplift	395	1,417	4,534	8,294	10,486
Average Comparison Expenditure (£ per capita) (2)	£2,492	£2,396	£2,687	£3,027	£3,638
Available Expenditure (£m)	£1.0	£3.4	£12.2	£25.1	£38.1

Sources & Notes: (1) Forecast population growth for Lesnes Valley Development derived from Bexley Growth Strategy and planned housing allocations.

(2) Average expenditure is derived from the Experian-based average expenditure for Zone 1.

2. COMPARISON GOODS CAPACITY

TABLE 2.1 LOWER BELVEDERE GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	10.0%	15.0%	25.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£0.63	£2.89	£14.50
Assumed "inflow" / trade draw from outside growth area (3):	5%	£0.00	£0.67	£3.04	£15.27
FORECAST COMPARISON GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£6,500	£7,645	£8,828	£10,784
NET FLOORSPACE CAPACITY (sq metres) (5)		0	87	345	1,416
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	124	492	2,022

TABLE 2.2 SLADE GREEN GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	5.0%	10.0%	10.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£0.25	£2.43	£7.75
Assumed "inflow" / trade draw from outside growth area (3):	0%	£0.00	£0.25	£2.43	£7.75
FORECAST COMPARISON GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£6,500	£7,645	£8,828	£10,784
NET FLOORSPACE CAPACITY (sq metres) (5)		0	33	275	719
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	47	393	1,027

TABLE 2.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

		2021	2026	2031	2038
Assumed (%) Retention Level (1)		0.0%	25.0%	25.0%	25.0%
Forecast retention of expenditure growth (£ million) (2)		£0.00	£3.05	£6.28	£9.54
Assumed "inflow" / trade draw from outside growth area (3):	10%	£0.00	£3.38	£6.97	£10.60
FORECAST COMPARISON GOODS FLOORSPACE CAPACITY:					
Estimated Average Sales Density of New Floorspace (£ per sq m) (4):		£6,500	£7,645	£8,828	£10,784
NET FLOORSPACE CAPACITY (sq metres) (5)		0	443	790	983
Assumed Net / Gross Floorspace Ratio (6):		70%	70%	70%	70%
Gross Floorspace Capacity (sq m) (7):		0	633	1,129	1,404

APPENDIX A11: LEISURE NEEDS ASSESSMENT – EXPENDITURE GROWTH

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2018 - 2038)

	2018	2021	2026	2031	2038
Zone 1	39,300	40,550	41,800	43,050	44,959
Zone 2	49,000	51,100	53,600	56,200	59,031
Zone 3	45,400	46,150	48,200	50,050	50,611
Zone 4	33,850	35,000	37,600	40,050	42,966
Zone 5	25,200	26,200	27,600	28,600	29,517
Zone 6	57,250	57,800	58,850	60,150	61,345
Zone 7	50,900	51,400	52,000	52,600	54,576
Zone 8	20,491	21,162	22,375	23,267	24,329
STUDY AREA - TOTAL:	321,391	329,362	342,025	353,967	367,335

		2018	2021	2026	2031	2038
Zones 1-6	BEXLEY BOROUGH	250,000	256,800	267,650	278,100	288,430
Zones 6-8	OUTSIDE BOROUGH	71,391	72,562	74,375	75,867	78,905
STUDY AR	EA TOTAL:	321,391	329,362	342,025	353,967	367,335
Source: Experian Business Strategies - MMG3 (GIS) 'Retail Area Planner Population & Expenditure Datasets'						

6.2% 2.500 10.0% 5,100 8.5% 3,900 14.4% 5,050 9.2% 2,400 4.1% 2,350 2.3% 1,200 9.9% 2,105 9.9% 32,576

Growth: 2021 to 2031

%

No.

Growth: 20	Growth: 2021 to 2031					
%	No.					
8.3%	21,300					
4.6%	3,305					
9.9%	32,576					

Experian Business Strategies - MMG3 (GIS) 'Retail Area Planner Population & Expenditure Datasets' Base year population & projections for Zones 1-7 sourced from GLA and for Zone 8 from LSH's Experian MMG3 datasets

TABLE 2: LEISURE EXPENDITURE PER CAPITA BY SERVICES (2019 price base)

Notes:

Notes:

	Accomm Services (1)	Cultural Services (2)	Games of Chance (3)	Personal Grooming (4)	Recreation & Sporting Services (5)	Restaurants, Cafés, etc. (6)
Zone 1	£157	£295	£171	£88	£149	£1,204
Zone 2	£164	£326	£193	£101	£164	£1,249
Zone 3	£220	£347	£175	£135	£232	£1,487
Zone 4	£250	£387	£171	£153	£266	£1,561
Zone 5	£237	£391	£195	£139	£246	£1,520
Zone 6	£242	£381	£174	£150	£256	£1,554
Zone 7	£239	£429	£206	£150	£256	£1,608
Zone 8	£261	£379	£206	£165	£274	£1,549
STUDY AREA AVERAGE:	£221	£367	£186	£135	£230	£1,466
EXPRESSED AS % OF TOTAL AVERAGE SPI	8%	14%	7%	5%	9%	56%

Source: Average spend per capita estimates (2019 prices) are derived from Experian MMG3 'Retail Area Planner' Reports.

(1) Includes spend on hotels, bed & breakfast accommodation, etc.

(2) Includes spend on Museums, Theatres, Art Galleries, etc.

(3) includes spend on Bookmakers, Amusement Arcades, Bingo, Casinos, etc.

(4) Includes spend on Hairdressers, Nail Parlours, Health & Beauty, etc.

(5) Includes spend on Gyms, Golf, etc.

(6) Includes spend on restaurants, cafés, takeaways, etc.

TABLE 3: LEISURE EXPENDITURE PER CAPITA GROWTH FORECASTS (% per annum)

	2018	2019	2020	2021	2022-2026	2027-2038
LEISURE SPEND - GROWTH PER ANNUM	-1.5%	-0.5%	0.9%	1.0%	1.2%	1.1%
Source: Experian 'Retail Planner Briefing Note 18 (October 2020). Figures 1a and 1b.						



 £2,064

 £2,195

 £2,596

 £2,788

 £2,728

 £2,756

 £2,888

 £2,834

 £2,606

 100%

TABLE 4: TOTAL FORECAST GROWTH IN LEISURE SERVICES SPEND (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£2,054	£2,103	£2,233	£2,358	£2,546	
Zone 2	£2,184	£2,237	£2,375	£2,508	£2,708	
Zone 3	£2,583	£2,645	£2,808	£2,966	£3,202	
Zone 4	£2,774	£2,841	£3,015	£3,185	£3,438	
Zone 5	£2,714	£2,780	£2,951	£3,117	£3,365	
Zone 6	£2,743	£2,809	£2,982	£3,149	£3,400	
Zone 7	£2,873	£2,943	£3,124	£3,299	£3,562	
Zone 8	£2,819	£2,888	£3,065	£3,238	£3,495	

TABLE 4a: TOTAL FORECAST GROWTH IN SPEND ON ACCOMMODATION SERVICES (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£156	£160	£170	£179	£194	
Zone 2	£163	£167	£177	£187	£202	
Zone 3	£219	£225	£238	£252	£272	
Zone 4	£248	£254	£270	£285	£308	
Zone 5	£236	£241	£256	£270	£292	
Zone 6	£241	£246	£261	£276	£298	
Zone 7	£238	£244	£259	£274	£295	
Zone 8	£260	£266	£282	£298	£322	

TABLE 4b: TOTAL FORECAST GROWTH IN SPEND ON CULTURAL SERVICES (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£293	£300	£319	£337	£363	
Zone 2	£324	£332	£352	£372	£402	
Zone 3	£345	£354	£375	£396	£428	
Zone 4	£385	£394	£419	£442	£477	
Zone 5	£389	£399	£423	£447	£482	
Zone 6	£379	£388	£412	£435	£470	
Zone 7	£427	£437	£464	£490	£529	
Zone 8	£377	£386	£410	£433	£467	

TABLE 4c: TOTAL FORECAST GROWTH IN SPEND ON GAMES OF CHANCE (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£170	£175	£185	£196	£211	
Zone 2	£192	£196	£208	£220	£238	
Zone 3	£174	£178	£189	£199	£215	
Zone 4	£170	£174	£185	£195	£211	
Zone 5	£195	£199	£211	£223	£241	
Zone 6	£173	£178	£189	£199	£215	
Zone 7	£205	£210	£223	£235	£254	
Zone 8	£205	£210	£223	£235	£254	

TABLE 4d: TOTAL FORECAST GROWTH IN SPEND ON PERSONAL GROOMING (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£88	£90	£95	£101	£109	
Zone 2	£100	£103	£109	£115	£124	
Zone 3	£134	£138	£146	£154	£167	
Zone 4	£153	£156	£166	£175	£189	
Zone 5	£138	£142	£150	£159	£171	
Zone 6	£149	£152	£162	£171	£184	
Zone 7	£149	£153	£162	£171	£185	
Zone 8	£164	£168	£179	£189	£204	

TABLE 4e: TOTAL FORECAST GROWTH IN SPEND ON RECREATION & SPORTING SERVICES (£ per capita)

	2018	2021	2026	2031	2038	
Zone 1	£149	£152	£162	£171	£184	
Zone 2	£163	£167	£178	£188	£203	
Zone 3	£231	£237	£251	£265	£286	
Zone 4	£264	£271	£287	£303	£327	
Zone 5	£245	£251	£266	£281	£303	
Zone 6	£254	£261	£277	£292	£315	
Zone 7	£254	£261	£277	£292	£315	
Zone 8	£273	£280	£297	£313	£338	

TABLE 4f: TOTAL FORECAST GROWTH IN SPEND ON FOOD & BEVERAGE (£ per capita) 2021 2026 2018 2031 2038 £1,198 £1,227 £1,302 £1,375 £1.485 Zone 1 £1,540 £1,242 £1,272 £1,426 Zone 2 £1,351 £1,608 £1,834 £1.479 £1.515 £1.699 Zone 3 Zone 4 £1.553 £1.591 £1,689 £1.784 £1.926 £1,549 £1,512 £1,644 £1,736 £1,874 Zone 5 £1,547 £1,584 £1,776 £1,917 £1,681 Zone 6 £1,600 £1,638 £1,739 £1,837 £1,983 Zone 7 £1,541 £1,578 £1,675 £1,769 £1,910 Zone 8

GROWTH (£m):					
2021-2031	2031-38				
£254.8	£442.5				
£271.0	£470.7				
£320.5	£556.5				
£344.1	£597.6				
£336.7	£584.8				
£340.3	£590.9				
£356.5	£619.1				
£349.8	£607.5				

GROWTH (£m):						
2021-2031	2031-38					
£19.4	£33.6					
£20.2	£35.1					
£27.2	£47.3					
£30.8	£53.5					
£29.2	£50.8					
£29.8	£51.8					
£29.6	£51.3					
£32.2	£56.0					

GROWTH (£m):					
2021-2031	2031-38				
£36.4	£63.1				
£40.2	£69.8				
£42.8	£74.4				
£47.8	£83.0				
£48.3	£83.8				
£47.0	£81.7				
£53.0	£92.0				
£46.8	£81.2				

GROWTH (£m):					
2031-38					
£36.7					
£41.3					
£37.4					
£36.7					
£41.9					
£37.4					
£44.1					
£44.1					

GROWT	'H (£m):
2021-2031	2031-38
£10.9	£18.9
£12.4	£21.6
£16.7	£29.0
£18.9	£32.9
£17.1	£29.8
£18.5	£32.1
£18.5	£32.1
£20.4	£35.4

GROWT	Ή (£m):
2021-2031	2031-38
£18.5	£32.0
£20.3	£35.2
£28.7	£49.8
£32.8	£56.9
£30.4	£52.7
£31.6	£54.8
£31.6	£54.8
£33.9	£58.8

GROWT	Ή (£m):
2021-2031	2031-38
£148.6	£258.0
£154.1	£267.7
£183.5	£318.7
£192.7	£334.7
£187.6	£325.8
£191.9	£333.2
£198.5	£344.6
£191.2	£332.0

TABLE 5: ALL LEISURE SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

	2018	2021	2026	2031	2038	
Zone 1	£80.7	£85.3	£93.3	£101.5	£114.5	
Zone 2	£107.0	£114.3	£127.3	£141.0	£159.9	
Zone 3	£117.3	£122.1	£135.3	£148.4	£162.1	
Zone 4	£93.9	£99.4	£113.4	£127.6	£147.7	
Zone 5	£68.4	£72.8	£81.4	£89.1	£99.3	
Zone 6	£157.0	£162.4	£175.5	£189.4	£208.6	
Zone 7	£146.2	£151.3	£162.4	£173.5	£194.4	
Zone 8	£57.8	£61.1	£68.6	£75.3	£85.0	
STUDY AREA - TOTAL:	£828.3	£868.7	£957.3	£1,045.9	£1,171.4	

		2018	2021	2026	2031	2038	
Zones 1-6	BEXLEY BOROUGH	£624.3	£656.3	£726.3	£797.1	£892.0	
Zones 6-8	OUTSIDE BOROUGH	£204.0	£212.4	£231.0	£248.9	£279.4	
STUDY AREA	A TOTAL:	£828.3	£868.7	£957.3	£1,045.9	£1,171.4	

GROWT	ſH (£m):				
2021-2031	2031-38				
£16.2	£29.2				
£26.6	£45.5				
£26.4	£40.0				
£28.1	£48.3				
£16.3	£26.5				
£27.1	£46.2				
£22.3	£43.1				
£14.2	£23.9				
£177.2	£302.7				
GROWT	TH (£m):				
202	1-31				
%	No.				
21.4%	141				
17.2%	36				
25.0%	218				

TABLE 5a: ACCOMMODATION SERVI	CES - TOTAL	AVAILABLE E	XPENDITU	RE FORECA	STS (£ million)
	2018	2021	2026	2031	2038	

STUDY AREA - TOTAL:	£69.6	£73.0	£80.5	£87.9	£98.5	
Zone 8	£5.3	£5.6	£6.3	£6.9	£7.8	
Zone 7	£12.1	£12.5	£13.5	£14.4	£16.1	
Zone 6	£13.8	£14.2	£15.4	£16.6	£18.3	
Zone 5	£5.9	£6.3	£7.1	£7.7	£8.6	
Zone 4	£8.4	£8.9	£10.2	£11.4	£13.2	
Zone 3	£10.0	£10.4	£11.5	£12.6	£13.8	
Zone 2	£8.0	£8.5	£9.5	£10.5	£11.9	
Zone 1	£6.1	£6.5	£7.1	£7.7	£8.7	

2018 2021 2026 2031 2038 Zones 1-6 BEXLEY BOROUGH £52.2 £54.8 £60.7 £66.6 £74.5 Zones 6-8 OUTSIDE BOROUGH £17.4 £18.2 £19.8 £21.3 £23.9	
2018 2021 2026 2031 2038	
2010 2021 2020 2021 2020	

TABLE 5b:	CULTURAL SERVICES	- TOTAL AVAILABLE EXPENDITURE FO	RECASTS (£ million)

	2018	2021	2026	2031	2038	
Zone 1	£11.5	£12.2	£13.3	£14.5	£16.3	
Zone 2	£15.9	£17.0	£18.9	£20.9	£23.7	
Zone 3	£15.7	£16.3	£18.1	£19.8	£21.7	
Zone 4	£13.0	£13.8	£15.7	£17.7	£20.5	
Zone 5	£9.8	£10.4	£11.7	£12.8	£14.2	
Zone 6	£21.7	£22.4	£24.2	£26.2	£28.8	
Zone 7	£21.7	£22.5	£24.1	£25.8	£28.9	
Zone 8	£7.7	£8.2	£9.2	£10.1	£11.4	
STUDY AREA - TOTAL:	£117.1	£122.8	£135.3	£147.8	£165.5	

		2018	2021	2026	2031	2038
Zones 1-6	BEXLEY BOROUGH	£87.6	£92.1	£101.9	£111.9	£125.3
Zones 6-8	OUTSIDE BOROUGH	£29.5	£30.7	£33.3	£35.9	£40.3
STUDY ARE	A TOTAL:	£117.1	£122.8	£135.3	£147.8	£165.5

TABLE 5c: GAMES OF CHANCE - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)						
	2018	2021	2026	2031	2038	
Zone 1	£6.7	£7.1	£7.7	£8.4	£9.5	
Zone 2	£9.4	£10.0	£11.2	£12.4	£14.0	
Zone 3	£7.9	£8.2	£9.1	£10.0	£10.9	
Zone 4	£5.8	£6.1	£7.0	£7.8	£9.1	
Zone 5	£4.9	£5.2	£5.8	£6.4	£7.1	
Zone 6	£9.9	£10.3	£11.1	£12.0	£13.2	
Zone 7	£10.4	£10.8	£11.6	£12.4	£13.9	
Zone 8	£4.2	£4.4	£5.0	£5.5	£6.2	
STUDY AREA - TOTAL:	£59.2	£62.1	£68.5	£74.8	£83.8	

		2018	2021	2026	2031	2038	
Zones 1-6	BEXLEY BOROUGH	£44.6	£46.9	£51.9	£57.0	£63.8	
Zones 6-8	OUTSIDE BOROUGH	£14.6	£15.2	£16.6	£17.8	£20.0	
STUDY AREA	TOTAL:	£59.2	£62.1	£68.5	£74.8	£83.8	

GROWT	GROWTH (£m):				
2021-2031	2031-38				
£1.2	£2.2				
£2.0	£3.4				
£2.2	£3.4				
£2.5	£4.3				
£1.4	£2.3				
£2.4	£4.1				
£1.8	£3.6				
£1.3	£2.2				
£14.9	£25.5				
GROWTH (£m):					

				
2021-31				
%	No.			
21.5%	12			
17.4%	3			
25.1%	18			

GROWTH (£m):						
2021-2031	2031-38					
£2.3	£4.2					
£4.0	£6.8					
£3.5	£5.3					
£3.9	£6.7					
£2.3	£3.8					
£3.7	£6.4					
£3.3	£6.4					
£1.9	£3.2					
£25.0	£42.8					
GROWT	GROWTH (£m):					
202	1-31					
%	No.					
21.5%	20					
17.0%	5					
25.0%	31					

GROWTH (£m):					
2021-2031	2031-38				
£1.3	£2.4				
£2.3	£4.0				
£1.8	£2.7				
£1.7	£3.0				
£1.2	£1.9				
£1.7	£2.9				
£1.6	£3.1				
£1.0	£1.7				
£12.7	£21.7				
GROWTH (£m):					

2021-31				
%	No.			
21.5%	10			
17.2%	3			
25.1%	16			

	2018	2021	2026	2031	2038	
Zone 1	£3.4	£3.6	£4.0	£4.3	£4.9	
Zone 2	£4.9	£5.2	£5.8	£6.5	£7.3	
Zone 3	£6.1	£6.4	£7.0	£7.7	£8.4	
Zone 4	£5.2	£5.5	£6.2	£7.0	£8.1	
Zone 5	£3.5	£3.7	£4.1	£4.5	£5.1	
Zone 6	£8.5	£8.8	£9.5	£10.3	£11.3	
Zone 7	£7.6	£7.8	£8.4	£9.0	£10.1	
Zone 8	£3.4	£3.6	£4.0	£4.4	£5.0	
STUDY AREA - TOTAL:	£42.6	£44.6	£49.2	£53.8	£60.2	

		2018	2021	2026	2031	2038	
Zones 1-6	BEXLEY BOROUGH	£31.6	£33.2	£36.8	£40.4	£45.2	
Zones 6-8	OUTSIDE BOROUGH	£11.0	£11.4	£12.4	£13.4	£15.0	
STUDY ARE	A TOTAL:	£42.6	£44.6	£49.2	£53.8	£60.2	

GROWTH (£m):				
2021-2031	2031-38			
£0.7	£1.2			
£1.2	£2.1			
£1.4	£2.1			
£1.5	£2.7			
£0.8	£1.3			
£1.5	£2.5			
£1.2	£2.2			
£0.8	£1.4			
£9.1	£15.6			
GROWTH (£m):				
2021-31				
~ /				

GROWTH (Em):				
2021-31				
%	No.			
21.5%	7			
17.4%	2			
25.0%	11			

TABLE 5e: RECREATION & SPORTIN	IG SERVICES -	TOTAL AVAI	LABLE EXPE	NDITURE F	ORECASTS (£ mi	llion)

	2018	2021	2026	2031	2038
Zone 1	£5.8	£6.2	£6.8	£7.4	£8.3
Zone 2	£8.0	£8.6	£9.5	£10.6	£12.0
Zone 3	£10.5	£10.9	£12.1	£13.3	£14.5
Zone 4	£8.9	£9.5	£10.8	£12.1	£14.1
Zone 5	£6.2	£6.6	£7.3	£8.0	£9.0
Zone 6	£14.6	£15.1	£16.3	£17.6	£19.3
Zone 7	£13.0	£13.4	£14.4	£15.4	£17.2
Zone 8	£5.6	£5.9	£6.6	£7.3	£8.2
STUDY AREA - TOTAL:	£72.6	£76.1	£83.8	£91.6	£102.6

		2018	2021	2026	2031	2038	
Zones 1-6	BEXLEY BOROUGH	£54.0	£56.7	£62.8	£68.9	£77.1	
Zones 6-8	OUTSIDE BOROUGH	£18.5	£19.3	£21.0	£22.7	£25.4	
STUDY ARE	A TOTAL:	£72.6	£76.1	£83.8	£91.6	£102.6	

TABLE 5f: FOOD & BEVERAGE - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

	2018	2021	2026	2031	2038
Zone 1	£47.1	£49.7	£54.4	£59.2	£66.8
Zone 2	£60.9	£65.0	£72.4	£80.2	£90.9
Zone 3	£67.2	£69.9	£77.5	£85.0	£92.8
Zone 4	£52.6	£55.7	£63.5	£71.4	£82.7
Zone 5	£38.1	£40.6	£45.4	£49.7	£55.3
Zone 6	£88.5	£91.6	£98.9	£106.8	£117.6
Zone 7	£81.4	£84.2	£90.4	£96.6	£108.2
Zone 8	£31.6	£33.4	£37.5	£41.2	£46.5
STUDY AREA - TOTAL:	£467.3	£490.1	£540.0	£590.1	£660.8

		2018	2021	2026	2031	2038	
Zones 1-6	BEXLEY BOROUGH	£354.3	£372.5	£412.1	£452.3	£506.1	
Zones 6-8	OUTSIDE BOROUGH	£113.0	£117.6	£127.9	£137.8	£154.7	
STUDY ARE	A TOTAL:	£467.3	£490.1	£540.0	£590.1	£660.8	

GROWTH (£m):			
2021-2031	2031-38		
£1.2	£2.1		
£2.0	£3.4		
£2.4	£3.6		
£2.7	£4.6		
£1.5	£2.4		
£2.5	£4.3		
£2.0	£3.8		
£1.4	£2.3		
£15.5	£26.5		
GROWTH (£m):			

2021-31				
%	No.			
21.5%	12			
17.3%	3			
25.0%	19			

GROWTH (£m):			
2021-2031	2031-38		
£9.5	£17.0		
£15.2	£25.9		
£15.1	£22.9		
£15.8	£27.1		
£9.1	£14.8		
£15.3	£26.1		
£12.4	£24.0		
£7.8	£13.1		
£100.0	£170.7		
GROWTH (£m):			

 	<u> </u>
202	1-31
%	No.
21.4%	80
17.2%	20
25.0%	123