Carter Jonas

Bexley Retail & Leisure Needs Update:

Final Report

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QA

Bexley Retail and Leisure Needs Update 2015

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1.0 INTRODUCTION

1.1 This report was commissioned by London Borough of Bexley (the 'Council') and updates the key findings of the *Retail and Leisure Needs Study* ('RLS') prepared by Strategic Perspectives (now part of Carter Jonas) in 2013.

1.2 Using the CREAT^e Capacity and Impact Model developed by Carter Jonas (CJ) this update assesses the future need ('capacity') for new retail (convenience and comparison goods) floorspace over the development plan period (to 2036), and the likely demand for new commercial leisure facilities.

1.3 The update is based on the study area (see **Appendix 1**) and market share analysis that informed the 2013 RLS, but specifically takes account of revised housing capacity and population projections provided by the Council. The two population projection scenarios for the Borough are set out in **Appendix 2**.

1.4 The study takes of significant potential housing capacity (up to 11,000 new homes) in the Belvedere area, which falls within Zone 1 of the study area. As a result, the Council is also exploring the potential to provide a new District Centre to serve the needs of the future population in the Belvedere area. Significant potential housing capacity is also identified by the Council for Bexleyheath (Zone 4).

1.5 The capacity update also takes account of:

- the most up to date retail (convenience and comparison goods) expenditure per capita levels derived from the latest *Retail Planner Reports* produced by Experian.
- the most recent forecasts of expenditure growth and 'non-store' retail sales (otherwise referred to as Special Forms of Trading)[1] based on Experian's latest *Retail Planner Briefing Note* 12.1 (October 2014).
- an update and overview of key retail trends and assumptions (see **Appendix 3)**.
- the current pipeline of committed new retail and commercial leisure floorspace in the Borough, as provided by the Council.

1.6 It should be noted at the outset that capacity forecasts carried out over a long period of time are inherently less certain and should be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a three-five year period in accordance with the NPPG. Notwithstanding this, account should also necessarily be taken of the forecast growth over the development plan period.

[1] SFT is made up of purchases that generally occur outside of shops such as, for example, via mail order, vending machines, telephone sales, market stalls and the Internet.

2.0 ECONOMIC CAPACITY MODEL AND ASSUMPTIONS

2.1 This section provides an update on the key assumptions and forecasts underpinning the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the London Borough of Bexley area up to 2036. The assessment updates and supersedes the retail capacity findings identified in the 2013 RLS taking account of revised population projections and potential housing capacity for the Borough.

ASSUMPTIONS & FORECASTS

2.2 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in Appendices 4a-c and in Appendix 5a-c, respectively. The capacity forecasts are based on the population growth projections provided by the Council, which are based on potential housing capacity estimates over the forecast period.

2.3 The following describes the key steps and assumptions underpinning the retail capacity assessment.

Population Projections

2.4 The Council has identified the following two population projection scenarios:

- PH3 (lower growth) – Table 1, **Appendix 2**; and
- PH4 (higher growth) – Table 2, **Appendix 2**.

2.5 Both growth scenarios forecast higher concentrations of population in the Bexleyheath and Belvedere areas by 2036. The lower population growth scenario (PH3) projects growth of +18.3% from 236,296 in 2015 to 279,567 in 2036. The higher population growth scenario (PH4) results in a population increase of +26.4% to 299,082 in 2036.

2.6 Within the study area, the greatest concentration of growth is in Belvedere (Zone 1) based on potential housing capacity of circa +11,000 over the forecast period. This results in a projected population growth of +78.0% (+28,968) up to 2036 for scenario PH3, and +101.7% (+37,759) under scenario PH4.

2.7 A high level of population growth is also projected for Bexleyheath based on potential housing capacity of +22.6% (+10,276) under scenario PH3, and +43.8% (+20,050) for scenario PH4.

2.8 As a benchmark, Table 3 (**Appendix 2**) sets out Experian's population projections, which are informed by the 2012-based Sub-national Population Projections (SNPP) produced by the Office of National Statistics (ONS). As Tables 1-2 (Appendix 2) show, Experian's population projections are lower than the Council's two population growth scenarios.

Expenditure per Capita & Special Forms of Trading (SFT)

2.9 The revised per capita expenditure and growth forecasts for each study zone are set out in Table 2 (**Appendix 4a** and **Appendix 4b**) for convenience and Table 2 (**Appendix 5a** and **5b**) for comparison goods. The base year average expenditure figures have been derived from our in-house Experian MMG3 Geographic Information System (GIS).

2.10 In identifying expenditure per capita, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. This is informed by the forecasts set out in Experian's latest *Retail Planner Briefing Note 12.1* (October 2014). The SFT forecasts have then been 'adjusted' to take account of goods sourced from traditional ('physical') retail space. Based on Experian's national forecasts and other research we have made a robust allowance for the growth in SFT for comparison goods from 11.7% to 15.1% between 2014 and 2036[2], and from 2.5% to 6.3% for convenience goods over the same period.

2.11 As highlighted in the 2013 RLS, we anticipate that the growth in SFT (particularly for convenience goods) will be higher in Bexley Borough than the national average, as the area is well served by major dotcom warehouses (including Tesco's dotcom facility in Erith). If the growth in internet shopping is stronger than that forecast by Experian, and a smaller proportion of online retail sales are sourced from existing shops, then this will reduce the total retail expenditure capacity available to support existing and new retail floorspace in the Borough area. We therefore advise the Council to regularly monitor SFT trends and update the forecast growth rates when necessary.

Total Available Expenditure

2.12 Total available retail expenditure for the Borough and the study zones is derived by multiplying the population and average expenditure per capita levels together. The forecasts based on the Council's two population projection scenarios (PH3 and PH4) show:

- a 27.5% to 35.5% (+£131.9m to +£171.0m) growth in total **convenience goods** expenditure by 2036 (Table 3, **Appendix 4a** and **4b**); and
- a 137.8% to 152.3% to (+£960.7m to £1,063.4m) growth in total **comparison goods** expenditure between 2015 and 2036 (Table 3, **Appendix 5a** and **5b**).

[2] Experian forecasts for SFT are provided up to 2035. We have assumed that the growth in SFT for convenience and comparison goods reflects the annual growth from the previous year (2034 to 2035).

2.13 Within the Borough, Table 3 (**Appendix 4a** and **4b**) shows a substantial growth in total available expenditure for the Zone 1 (including the Belvedere and Abbey Wood) of between +94.2% and +120.0% for convenience. Growth is even higher for comparison goods at between +264.6% and +313.1% (Table 3, **Appendix 5a** and **5b**). This reflects the Council's estimations for potential housing capacity growth in the area.

2.14 A high level of expenditure growth is also forecast for the Erith area (Zone 2) of between +151.1% and +194.0% for comparison and +33.8% and +56.8% for convenience expenditure. Again, this growth reflects the potential housing capacity identified by the Council for the Erith area.

MARKET SHARE ANALYSIS UPDATE

2.15 The market share analysis identified in the 2013 RLS was informed by the findings of a household survey conducted in April 2013 as part of the study's evidence base.

2.16 Since the completion of a the household survey, three foodstores have opened in the Borough:

- Asda Superstore (6,473m^2 gross), off Station Road in Belvedere;
- Waitrose store (842m^2 gross) on High Street in Sidcup; and
- Sainsbury's Local (447m^2) gross at 287 Brampton Road, near Bexleyheath.

2.17 We have necessarily updated the 2013 RLS market share analysis (Table 4, Appendices 4a-4c and 5a-5c) to take account of the impact of these stores on shopping patterns and turnover levels. The estimated turnover of these new stores is set out in Table 6 (**Appendices 4a-4c)** for convenience goods and Table 6 (**Appendices 5a-5c**) for new comparison floorspace.

2.18 It is expected that the Asda Superstore in Belvedere (Zone 1) and the Waitrose store in Sidcup (Zone 6) have increased the market shares in their respective study zones through the claw back of leaked expenditure to neighbouring zones and beyond. The Sainsbury's Local in Bexleyheath is also expected to draw the majority of its trade from stores in its catchment zone (Zone 4).

2.19 Based on the above, we have revised the market shares in those zones where the new stores are likely to have influence, as set out in Tables 7a and 7b (**Appendices 4a and 4b**) for convenience goods. The revised market shares for comparison goods are set out in Tables 7a and 7b (**Appendices 5a and 5b**).

2.20 We have assumed the following market shares for the three new stores:

- **Asda in Belvedere** will achieve a market share of up to 3.9% of total study expenditure (Table 7a, **Appendices 4a and 4b**). This is based on our judgement that the store will draw 65% of its turnover from the study area, with the remainder from outside of the study area. We have also assumed that the Asda store will draw the majority of its turnover, 'like for like', from nearby larger foodstores, such as Morrisons in Erith and Asda in Bexleyheath. The store is also likely to 'claw back' expenditure from Zone 1 that is 'leaked' to foodstores outside of the study area (e.g. stores in nearby Thamesmead).
- The smaller format **Waitrose store in Sidcup** is estimated to achieve a more limited market share of total study area expenditure (approximately 0.9%). Given Sidcup's proximity to the study area boundary, it is assumed that 65% of the store's turnover will be supported by expenditure from within the Borough; in particular trade draw from existing foodstores in Sidcup, such as Morrisons and Tesco Express. The remainder of the store's turnover (35%) is likely to be drawn from outside of the Borough, including from the London Borough of Bromley.
- The **Sainsbury's Local store on Brampton Road** is expected to draw the majority (80%) of its trade from within Zone 4 (Bexleyheath), including from comparable local stores and larger foodstores in the town centre (e.g. Asda and Sainsbury's).

2.21 For comparison goods, the market shares have been adjusted to take account of ancillary comparison floorspace associated with the new Asda store in Belvedere (Table 7a**,** Appendices 5a and 5b). For this, we have assumed a similar change to market shares as applied to convenience goods. No other major comparison retail development has been identified in the Borough since the 2013 RLS was published.

PLANNED COMMITMENTS SINCE 2013

2.22 In addition to the new foodstore openings we have also reviewed and updated the planned retail commitments in the Borough since the 2013 RLS was published. Table 1 (**Appendix 6**) identifies the major foodstores and non-food retail floorspace with planning permission (after the household survey was conducted). The following provides a brief summary of these outstanding commitments based on information provided by London Borough of Bexley and the evidence submitted in support of the planning applications:

- **Imperial Gateway, Belvedere** (12/00267/FUL) - Permission granted in September 2012 for a foodstore (no named operator) with a total convenience sales area of 1,925m^2 net. The development was completed at the time of preparing this assessment, but the foodstore remains unoccupied.

- **Lidl, The Broadway, Bexleyheath** (ref: 13/01895) - Planning permission was granted in March 2014 for a 1,180m^2 (net sales) Lidl foodstore in Bexleyheath town centre.
- **27-27 Upper Wickham Lane, Welling** (ref: 12/0031) - Planning permission was granted in February 2013 for the redevelopment of the town centre site. The scheme will create a net increase of 531m^2 gross of retail floorspace. The store is now trading and is occupied by a children's accessories retailer.
- **Christopher House, Sidcup** (ref: 13/01323)) - Planning permission was granted for a mixed use scheme including retail, student accommodation and a hotel. The scheme involves the redevelopment of existing buildings, which includes existing retail floorspace. The scheme results in a net increase of 295m^2 gross retail floorspace.
- **Southmere Village, Tavy Bridge, Thamesmead** (ref: 04/03641) - Planning permission was granted in December 2007 for a 477m^2 (gross) retail unit as part of a new neighbourhood development.
- **Crayford Town Hall –** Planning permission was granted in September 2008 for a mixed use scheme comprising residential, retail and community facilities. The scheme includes the development of 593m^2 (gross) of new retail floorspace, which was unoccupied at the time of this assessment.
- **Howbury Centre, Slade Green** (12/01219/OUMT06) - Planning permission was granted in August 2014 for a reserved matters submission, comprising 96 dwellings and retail accommodation. The scheme involves the redevelopment of an existing site that includes existing retail floorspace. The scheme results in a net increase of 300m^2 gross retail floorspace.

2.23 Planning permission was also granted in October 2013 by Royal Borough of Greenwich (ref: 12/3058/F) for the demolition of existing buildings on land at Harrow Manorway and Felixstow Road (referred to as the **'Cross Quarter'** site in **Abbey Wood**) and the development of a mixed use scheme to include a new Sainsbury's (Class A1) foodstore 'on stilts' (4,514m^2 net), along with other A1/A2/A3/D1 retail and community use, a hotel (C1), 31 residential units, an Energy Centre, and a new public square. The Sainsbury's store is due to open in late 2015.

2.24 The 2013 RLS included the permitted **Tesco Superstore** in **Bexleyheath** (ref: 11/01998/FULM), which extends to a net sales area of 7,200m^2. However, Tesco Stores Ltd has subsequently announced that they are no longer taking the store forward for development. At this stage it is uncertain whether another operator will develop a foodstore on this site, as the UK's main grocers have moved away from large superstore schemes.

2.25 The only main non-food commitment identified by the local planning authority is the retail scheme on the former "**BT Island Site**" in **Crayford** (ref: 06/03405/OUTM). Planning permission was granted in March 2012 for four (Class A1) units with a total gross area of 5,610m^2. This was included in the 2103 RLS. However, we understand that due flooding issues it is unlikely that the level of floorspace planned can be delivered in full. Therefore, for the purpose of this assessment, we have revised the committed floorspace and assumed a development of up to 3,000m^2 (gross).

3.0 RETAIL NEEDS ASSESSMENT UPDATE

3.1 This section sets out the results of the quantitative need (capacity) update for new retail (comparison and convenience goods) floorspace in the London Borough of Bexley area up to 2036. The results supersede the findings of 2013 RLS following a review of population projections linked to potential housing capacity forecasts for the Borough.

METHODOLOGY

3.2 The update is based on CJ's ***CREAT**^e* model and draws on the most up to date average retail (convenience and comparison goods) expenditure reviewed in **Section 2** and informed by key retail trends detailed in **Appendix 3**.

3.3 The capacity forecasts for both convenience and comparison goods are presented as two population growth scenarios for the Borough and study zones over the forecast period (2015 to 2036):

- Scenario PH3 - lower population growth
- Scenario PH4 - higher population growth

3.4 For reference purposes we have also prepared 'benchmark' capacity forecasts based on Experian's lower population projections, which are based on the ONS's *2012-based Sub National Population Projections*.

3.5 The capacity assessment is underpinned by market shares for stores and centres across the Borough, which was identified by a Household Telephone Interview Survey (HTIS) conducted by NEMS Market Research in April 2013. As highlighted in Section 2, we have adjusted market shares to take account of new store openings in the Borough since 2013; namely Waitrose in Sidcup District Centre, Sainsbury's Local on Brampton Road (near Bexleyheath) and the out of centre Asda store near Belvedere Station. The adjustments to market shares take account of the likely trade draw from existing stores in the Borough to the aforementioned new stores. This allows for a more accurate estimation of the current and forecast turnover of stores and centres in the Borough.

3.6 Following the revision to the market share analysis (Table 6, Appendices 7a-7c and 8a-8c), it has necessarily been assumed that the Borough's convenience and comparison goods retail floorspace is in 'equilibrium' at 2015. In other words, we assume that the existing centres and stores in the Borough are broadly trading in line with appropriate 'benchmark' turnover levels at the base year. The equilibrium approach then assumes that the revised market shares identified for the centres and stores remain constant over the forecast period. This approach differs to the methodology used for the 2013 RLS, which identified convenience retail capacity based on the turnover from over-trading foodstores. The change in approach reflects the fact that the convenience retail market has changed dramatically since 2013 and it is uncertain how this market will evolve in the future. Therefore, we consider that the 'equilibrium' approach will provide a more robust assessment of forecast convenience floorspace capacity, as it takes account of the growth and increasing market share of retail sales by internet shopping and the withdrawal of the major grocers from major superstore development.

3.7 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate ranging from -0.3% to 0.1% over the forecast period. We have assumed a corresponding annual productivity growth for comparison floorspace averages at circa 2.2%. These growth rates have been informed by Experian's latest Briefing Note[3] and other research.

3.8 At the outset we advise that all capacity forecasts beyond a five year period should be treated with caution. This is because long term trends in the economy, consumer demand and retail property market could have a significant impact on the potential capacity and need for new retail floorspace. For example, as discussed previously, a higher growth in non-store retail sales (i.e. Internet sales) than forecast by Experian would reduce the capacity for new retail floorspace over time. Notwithstanding this, it should also be noted that this Borough-wide strategic capacity assessment is based on a standard constant market share approach. It does not therefore take account of any potential uplift in market shares and capacity that could occur within catchment areas due to the 'claw back' of expenditure to planned retail floorspace in more convenient and sustainable town centre locations. This differs from this capacity 'refresh' which has necessarily modelled the likely changes to market shares from new store openings based on the survey evidence and informed judgements.

CAPACITY: BOROUGH-WIDE FORECASTS

Convenience Goods Capacity

3.9 For Scenarios PH3 and PH4 the key steps in assessing Borough-wide capacity for convenience goods expenditure and floorspace are set out in Table 16a Appendix 4a and Appendix 4b respectively. The table below summarises the 'global' capacity forecasts:

[3] However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

Table 3.1 **Borough-wide Convenience Goods Capacity – Assuming 'Equilibrium'**

	2016	2021	2026	2031	2036
SCENARIO PH3 – LOWER HOUSING GROWTH					
Residual Expenditure (£m):	-£61.2	-£42.5	£5.6	£47.6	£55.9
Floorspace Capacity (m^2 net):	-4,915	-3,445	455	3,820	4,468
SCENARIO PH4 – HIGHER HOUSING GROWTH					
Residual Expenditure (£m):	-£61.0	-£18.3	£29.9	£84.3	£92.8
Floorspace Capacity (m^2 net):	-4,900	-1,481	2,411	6,768	7,421
EXPERIAN POPULATION GROWTH – 'BENCHMARK'					
Residual Expenditure (£m):	-£58.1	-£19.4	£16.7	£53.0	£93.1
Floorspace Capacity (m^2 net):	-4,669	-1,571	1,346	4,256	7,443

Source:
Scenario PH3 (lower population growth) - Table 16a, Appendix 4a
Scenario PH4 (higher population growth) - Table 16a, Appendix 4b
Experian Population Growth - Table 16a, Appendix 4b

Note: Equilibrium assumes that market shares identified for the Borough and centres (Table 7a, Appendix 4a-4c) remain constant over the forecast period.

3.10 In order to convert the residual expenditure into a net sales figure we have assumed superstore format floorspace will achieve an average sales density of approximately £12,500 per m^2 in 2015. This is broadly based on the average sales performance of the main foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrisons, etc.).

3.11 The table shows that there is no quantitative capacity for new convenience goods floorspace in the Borough over the short term (up to 2021) for either of the population growth scenarios based on potential housing capacity. This reflects the impact of the significant foodstore commitments that are scheduled to open across the Borough within the next five years.

3.12 Based on the Council's lower population growth scenario (PH3) there is limited capacity in 2026, although capacity significantly increases in 2031 to 3,820m^2 (net) and 4,468m^2 (net) by 2036. The results are lower than capacity based on Experian's population projections over the forecast period.

3.13 The forecast capacity results are considerably higher based on the Council's higher population growth scenario (Scenario PH4) with capacity for up to 7,421m^2 (net) by 2036. It is noted that the results are higher than capacity based on Experian population projections up to 2031, although the forecasts for 2036 are comparable.

3.14 Assuming that the permitted Tesco Superstore in Bexleyheath is not implemented, the table below shows that the forecast capacity increases even further:

Table 3.2 **Borough-wide Convenience Goods Floorspace Capacity (m^2 net) – Discounting Tesco Bexleyheath**

	2016	2021	2026	2031	2036
Scenario PH3 - Lower Growth	-2,213	-711	3,189	6,544	7,111
Scenario PH4 - Higher Growth	-2,580	1,253	5,145	9,491	10,064
Experian Growth	-1,968	1,163	4,080	6,980	10,086

Source:
Scenario PH3 (lower population growth) - Table 16b, Appendix 4a
Scenario PH4 (higher population growth) - Table 16b, Appendix 4b
Experian Population Growth – Table 16b, Appendix 4c

Note: Equilibrium assumes that revised market shares identified for the Borough and centres (Table 7a, Appendix 4a-4c) remain constant over the forecast period.

Comparison Goods Capacity

3.15 The key steps in assessing Borough-wide capacity for comparison goods expenditure and floorspace for Scenarios PH3 and PH4 are set out in Table 15a (Appendix 5a and Appendix 5b), respectively. The residual expenditure and floorspace capacity forecasts for the Council's two population scenarios and Experian's 'benchmark' population projections are summarised in the table below.

Table 3.3 **Borough-wide Comparison Goods Capacity - Assuming 'Equilibrium'**

	2016	2021	2026	2031	2036
SCENARIO PH3 – LOWER HOUSING GROWTH					
Residual Expenditure (£m):	£1.1	£23.2	£137.1	£282.6	£375.2
Floorspace Capacity (m^2 net):	186	3,430	18,143	33,544	39,942
SCENARIO PH4 – HIGHER HOUSING GROWTH					
Residual Expenditure (£m):	£1.4	£63.7	£186.9	£356.6	£460.9
Floorspace Capacity (m^2 net):	234	9,398	24,735	42,325	49,068
EXPERIAN POPULATION GROWTH					
Residual Expenditure (£m):	£5.3	£53.6	£142.0	£265.3	£419.2
Floorspace Capacity (m^2 net):	863	7,902	18,791	31,493	44,627

Source:
Scenario PH3 (lower population growth) - Table 16a, Appendix 5a
Scenario PH4 (higher population growth) - Table 16a, Appendix 5b
Experian Population Growth – Table 16a, Appendix 5c

Note: Equilibrium assumes that market shares identified for the Borough and centres (Table 7a, Appendix 5a-5c) remain constant over the forecast period.

3.16 As the table shows, there is significant forecast capacity for new comparison goods floorspace in the Borough over the study period (2015 to 2036) after taking account of committed floorspace. Based on the Council's two population growth scenarios the capacity ranges between 3,430m^2 (net) and 9,398m^2 (net) in 2021; increasing to 18,143m^2 (net) and 24,735m^2 (net) in 2026. By 2036, comparison floorspace capacity increases further to 39,942m^2 (net) and 49,068m^2 (net) based on population growth scenarios PH3 and PH4 respectively.

3.17 The forecast capacity based on Experian population projections results in a higher quantum of comparison floorspace than the Council's lower population projections (PH3), but below the Council's higher population projections (PH4).

3.18 The table below shows that after discounting turnover associated with the permitted Tesco at Bexleyheath, forecast capacity will be higher.

Table 3.4 **Borough-wide Comparison Goods Floorspace Capacity (m^2 net) – Discounting Tesco Bexleyheath**

	2016	2021	2026	2031	2036
Lower Growth (PH3)	4,227	7,503	22,216	37,277	43,675
Higher Growth (PH4)	4,275	13,470	28,808	46,059	52,802
Experian Growth	4,904	11,975	22,864	35,226	48,361

Source:
Scenario PH3 (lower population growth) - Table 16b, Appendix 5a
Scenario PH4 (higher population growth) - Table 16b, Appendix 5b
Experian Population Growth – Table 16b, Appendix 5c

Note: Equilibrium assumes that market shares identified for the Borough and centres (Table 7a, Appendix 5a-5c) remain constant over the forecast period.

3.19 It should be noted that the forecast expenditure 'residual' has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £6,000 per m^2. This is broadly equivalent to the average sales density of new comparison goods floorspace trading in prime shopping locations. Notwithstanding this assumption, average sales levels will vary depending on a range of factors[4]. The Council should be aware that these different sales levels assumptions will have implications for the assessment of the need for, and impact of different types of comparison goods retailing. It will also be a material consideration for the local

[4] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m^2, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m^2 and above.

planning authority when assessing and determining applications for large format retailing (such as retail warehouses for example).

CAPACITY FORECASTS FOR KEY CENTRES

3.20 Capacity forecasts have been identified for each of the Borough's main centres located within the six defined study zones. This will help the Council to identify where new retail development should be directed within the Borough; particularly taking account of potential housing growth areas.

3.21 It should be noted at the outset that any forecast floorspace capacity identified for a specific centre does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. Reasons may include:

- a lack of suitable and viable sites available in some centres that can accommodate the forecast capacity;
- it may be more appropriate to locate the floorspace capacity in a nearby centre to encourage more sustainable travel patterns and/or help to achieve new regeneration/investment initiatives; and/or
- floorspace capacity may be required to support new retail provision as part of a new town, district or local centre, which may form part of a strategic housing area where a local need for new retail provision is identified.

3.22 Furthermore, if sufficient town centre and/or edge of centre sites cannot be identified to meet the forecast capacity over the development plan period, then the local planning authority is required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, through linked pedestrian trips and increased footfall.

3.23 Against this background, the following sets out retail capacity forecasts for the Borough's main centres and the Belvedere area based on the Council's two population growth scenarios.

Convenience Goods

3.24 For the purpose of this update our capacity forecasts assume 'equilibrium' at the base year, as for our Borough-wide forecasts. The results of the capacity assessment convenience goods floorspace for the Borough's main centres and the Belvedere area are set out in Tables 19 to 25 (Appendices 4a to 4c) and are summarised in the table below.

Table 3.5 **Convenience Floorspace Capacity: Borough's Main Centres (m^2 net)**

	Scenario	2016	2021	2026	2031	2036
Bexleyheath Strategic Centre (Zone 4)	PH3	-2,850	-2,563	-1,775	-1,050	-872
	PH4	-2,848	-2,220	-1,407	-572	-392
Crayford District Centre (Zone 5)	PH3	75	338	872	1,299	1,412
	PH4	77	560	1,049	1,742	1,856
Erith District Centre (Zone 2)	PH3	38	367	1,178	1,794	1,876
	PH4	44	830	1,503	2,721	2,805
Welling District Centre (Zone 3)	PH3	35	197	514	793	874
	PH4	35	294	640	884	965
Sidcup District Centre (Zone 6)	PH3	39	153	281	395	454
	PH4	39	162	295	413	471
Belvedere Area (Zone 1)	PH3	-2,293	-2,228	-1,388	-572	-538
	PH4	-2,292	-1,600	-570	-6	29
Rest of Study Area (Zone 2-6)	PH3	41	291	772	1,161	1,261
	PH4	44	492	901	1,586	1,688

Source:
Scenario PH3 (lower population growth) - Tables 19-25, Appendix 4a
Scenario PH4 (higher population growth) - Tables 19-25, Appendix 4b
Experian Population Growth – Tables 19-25, Appendix 4c

Note: Equilibrium assumes that market shares identified for the Borough and centres (Table 4a, Appendix 4a-4c) remain constant over the forecast period.

3.25 After taking account of new foodstore and convenience commitments serving each of the main centres the table shows:

- No capacity for new convenience floorspace in **Bexleyheath** due to the Tesco Superstore and Lidl commitments. However, as described previously, Tesco is no longer taking forward the scheme in Bexleyheath and we have therefore revised the capacity forecasts to discount the Tesco commitment. On this basis, Table 19b (Appendices 4b) shows capacity for up to 2,331m^2 (net) by 2036 based on the Council's higher housing growth rate (Scenario PH4).
- The highest quantum of forecast convenience capacity is identified for **Erith District Centre**, ranging from 1,876m^2 (net) based on the Council's lower population growth (PH3) to 2,805m^2 (net) based on the Council's higher housing growth rate (Scenario PH4) by 2036. This reflects high population growth in Zone

2 associated with potential housing capacity estimates. The forecast capacity could support a medium sized foodstore.

- Up to 1,856m^2 (net) by 2036 is also identified for **Crayford District Centre** based on the Council's higher population growth scenario (PH4).
- Forecast capacity for **Sidcup District Centre** is limited, but could potentially support a 'local' format foodstore outlet (e.g. Sainsbury's Local, Tesco Express, etc.) or an extension to existing stores.
- Limited capacity in the **Belvedere** area, as any residual expenditure capacity is absorbed by the committed foodstore and convenience schemes in the Thamesmead and Abbey Wood areas (Zone 1); including Cross Quarter, Belvedere Park/Imperial Gateway and planned retail units at Southmere Village, Thamesmead. However, further consideration is given to the potential for local convenience facilities to serve potential significant planned and potential future housing capacity in the Belvedere area.

3.26 The capacity assessment quantifies residual forecast capacity for the Borough (i.e. Study Area), which includes smaller District Centres, local shops/ centres and out of centre locations. As Table 3.5 shows, after discounting forecast capacity for the Borough's five main centres and the Belvedere area, there is forecast capacity for 1,261m^2 to 1,688m^2 (net) over the forecast period (2015 to 2036). This residual forecast floorspace should be directed to existing centres and/ or proposed new centres to support their local catchment population.

3.27 Based on the quantitative and qualitative evidence we advise that forecast convenience capacity could be met by the extension of existing stores, or the construction of new appropriately sized foodstores on suitable and viable sites in the Borough's main centres.

3.28 The forecast floorspace capacity could also be used to support local retail facilities for a new district centre that could serve planned housing and potential future housing capacity in the Belvedere area. The creation of a district centre to serve this new local population would meet the aims of the NPPF by promoting sustainable development. This is explored in more detail in Section 4.

3.29 Where sites are not available in town centre locations, or as part of a new district centre for Belvedere, over the development plan period then consideration should be given to sites on the edge of these centres that are well connected to the primary shopping areas and are capable of generating linked trip expenditure to the benefit of each centre's overall vitality and viability.

3.30 To help inform our capacity assessment and recommendations to the Council, we have also assessed the likely 'benchmark' turnovers of the Borough's main stores/centres (see Table 16, Appendix 4a-4c) based on sales areas and company average turnover levels derived from a number of published sources (including Mintel's Retail Rankings and Verdict). Table 17 (Appendices 4a-4c) shows the differences between the forecast 'benchmark' turnovers (Table 16) and our assessment of 'current' turnover levels based on the survey-derived market share analysis (Table 12). The table shows considerable variances between the different key foodstores. For example, the Asda (Broadway and Crooklog stores) and Sainsbury's stores in Bexleyheath, Tesco in Welling, and the Morrisons store in Sidcup are trading above their 'benchmark' turnover levels. In contrast, the Morrisons in Welling and Sainsbury's in Crayford are trading below company 'benchmarks'.

3.31 Based on the available evidence we do not consider that the level of over-trading and under-trading of existing superstores in the Borough should necessarily be used to support additional capacity for new convenience goods floorspace at the base year, over and above the forecasts set out in Table 3.5. As far as we are aware, none of the Borough's larger superstores exhibit the qualitative signs of over-trading, including in-store congestion, queues at checkouts, etc. Furthermore, we would expect the Borough's store to trade above company UK averages based on the size and density of the catchment populations in London, and the total available expenditure in Bexley Borough. Finally, there have been significant changes in the grocery sector and online retailing over the last two years, since the 2013 RLS was prepared, and the commercial reality now is that there is limited demand from the main grocery retailers for new larger superstore format floorspace.

Comparison Goods

3.32 For comparison goods Tables 17 to 23 (Appendix 5a to 5c) provide a more detailed breakdown of floorspace capacity for the main centres within the Borough's six defined zones assuming 'equilibrium' at the base year. The results are summarised in the table below.

Table 3.6 **Comparison Floorspace Capacity: Borough's Main Centres (m^2 net)**

	Scenario	2016	2021	2026	2031	2036
Bexleyheath Strategic Centre (Zone 4)	PH3	-536	964	8,264	16,018	19,070
	PH4	-513	4,072	11,810	20,353	23,575
Crayford District Centre (Zone 5)	PH3	-289	193	1,762	3,370	4,211
	PH4	-281	639	2,090	4,375	5,255
Erith District Centre (Zone 2)	PH3	213	358	790	1,168	1,344
	PH4	217	522	894	1,563	1,755
Welling District Centre (Zone 3)	PH3	68	150	477	828	1,039
	PH4	68	212	539	928	1,142
Sidcup District Centre (Zone 6)	PH3	469	599	1,044	1,516	1,851
	PH4	470	657	1,109	1,608	1,946
Belvedere Area (Zone 1)	PH3	-188	468	4,318	8,359	9,626
	PH4	-176	2,452	6,685	10,885	12,250
Rest of Study Area (Zones 2-6)	PH3	448	698	1,488	2,285	2,802
	PH4	450	843	1,608	2,614	3,144

Source:
Scenario PH3 (lower population growth) - Tables 17-23, Appendix 5a
Scenario PH4 (higher population growth) - Tables 17-23, Appendix 5b
Experian Population Growth – Tables 17-23, Appendix 5c

Note: Equilibrium assumes that market shares identified for the Borough and centres (Table 7a, Appendix 5a-5c) remain constant over the forecast period.

3.33 The table shows that the majority of the Borough-wide forecast comparison goods capacity by 2036 is directed to **Bexleyheath Strategic Centre** (19,070m^2 net to 23,575m^2 net) in Zone 4. The capacity for new floorspace increases further after discounting comparison goods turnover associated with the permitted Tesco Superstore in Bexleyheath.

3.34 Notwithstanding this there is also potential to increase the scale and quality of the retail offer in the Borough's other main centres, subject to the identification and availability of suitable and viable sites over the development plan period. As the table shows, there is capacity for new comparison goods floorspace identified for **Crayford District Centre** for 4,211m^2 to 5,255 m^2 (net) up to 2036.

3.35 There is also the potential to support new non-food retail uses at key housing growth areas in the Borough. This particularly applies to the potential for a new district centre to serve future planned and potential housing capacity in the **Belvedere area**, which could help to absorb some of the identified comparison goods capacity (between 9,626m^2 and 12,250m^2) by 2036. The development of a new district centre in the area would meet the NPPF's requirement for sustainable development. This is assessed in more detail in Section 4.

3.36 Finally, after taking account of the capacity for the Borough's five main centres and the Belvedere area, there a residual capacity of 2,802m^2 to 3,144m^2 net for new comparison floorspace in the rest of the Borough area. This includes smaller District Centres, local neighbourhoods and out of centre locations (excluding edge and out of centre locations included as part of Bexleyheath Major Centre and Crayford District Centre). This residual floorspace should be directed to existing centres as a priority or could potential support comparison retail provision for planned/ proposed town centres over the development plan period.

3.37 Given the scale of forecast comparison floorspace for the Borough, and across the five main centres (and the Belvedere area), the Council is faced with the challenge of identifying sites in existing town centres and potential new centres (e.g. new district centre in Belvedere) to accommodate the identified floorspace capacity in full over the development plan period.

3.38 If forecast floorspace cannot be accommodated within existing or proposed town centres policy consideration may be required to support the extension of an existing out of centre retail park. However, new out of centre floorspace should only be directed to existing locations that are well served by public transport and other sustainable travel modes, and where it can be demonstrated that there will be no 'significant adverse impact' on the vitality and viability of existing centres in accordance with the NPPF (paragraph 26).

4.0 BELVEDERE GROWTH AREA

4.1 This section describes the potential indicative need for new retail floorspace to serve future residents of the Belvedere area. This is based on potential housing capacity and associated population growth forecast for Zone 1 to 2036. This initial assessment will help the Council to identify the type and quantum of retail floorspace for a potential new district centre, although we advise that more detailed economic and market capacity assessments will be required as part of any masterplan for the area.

4.2 The methodology used to assess capacity associated with potential housing capacity in Belvedere over the forecast period is based on the following key considerations:

- population growth in Zone 1 associated with planned housing/ potential housing capacity and associated retail expenditure over the forecast period (2015 to 2036);
- a potential improvement to the current expenditure retention level (%) for convenience and comparison goods within Zone 1; assuming a new district centre is developed to support planned housing/ potential housing capacity in the area; and
- planned retail commitments in Zone 1 and associated turnover based on expenditure in Zone 1 (catchment penetration).

4.3 Unlike the capacity assessment set out in Section 3, this assessment is based on capacity for Zone 1 only, including baseline data (i.e. population and expenditure) and market shares identified for Zone 1. This high level capacity assessment does not take account of other factors used in detail assessments such as expenditure drawn from other zones in the study area and beyond. The findings are not directly comparable to the detail capacity assessment set out in Section 3. Instead, the results provide an **indicative** assessment of potential need for new retail floorspace as part of a new district centre for Belvedere and help to inform future development proposals going forward.

4.4 Given the potential scale of new housing to be delivered in the Belvedere area there is likely to be a qualitative need as well as a localised quantitative need to provide local facilities that are accessible to, and within easy walking distance of new communities. Therefore capacity for new floorspace is based on the potential for expenditure retained in Zone 1 to increase through the development of a new district centre. As such, the indicative capacity assessment for convenience and comparison goods floorspace is based on the potential to improve corresponding expenditure retention (market share) from Zone 1.

CONVENIENCE CAPACITY

4.5 Based on the Council's two housing population growth scenarios we forecast that Belvedere's (Zone 1) population will increase by between +28,968 and +37,759 over the period 2015 to 2036.

4.6 The opening of Morrisons on Station Road and the future development of the Sainsbury's Cross Quarter is likely to meet some of the future demand for main 'bulk' food shopping needs in the area. However, depending on the location of new housing there may be the critical mass (i.e. concentration of population and available expenditure) as part of a new settlement to support a new foodstore.

4.7 In assessing the capacity for new retail floorspace specifically generated by potential capacity for new housing identified for the Belvedere Growth Area, we have therefore based our assessment on the residual expenditure generated by the projected population, after taking account of the likely impact of new foodstore openings and commitments in the area.

4.8 Based on the population projections we forecast that there will be between £64.0m and £81.5m of available convenience goods expenditure at 2036 (see Table 3, **Appendices 4a and 4b**). For comparison goods, total available expenditure ranges from £197.2m to £235.9m (**Appendices 5a and 5b**).

4.9 The revised market share analysis identified a retention rate of 34.7% for convenience goods expenditure. It is assumed that the increase in population within Zone 1, alongside the potential development of a new district centre and neighbourhood facilities, could improve convenience goods expenditure retention. For the purpose of this assessment we have assumed the potential to improve expenditure retention in Zone 1 to 50%, which is comparable to the current combined average retention level for Zones 2-6.

4.10 We have also taken account of planned convenience floorspace in the area (including Sainsbury's foodstore at Cross Quarter and convenience outlets at Imperial Gate and Southmere Village), which will draw convenience expenditure floorspace from Zone 1.

4.11 The table below provides a high level assessment of potential floorspace capacity linked to the growth in population in Zone 1 associated with potential housing capacity over the period 2015 to 2036. It takes account of the potential to improve expenditure retention and the turnover associated with committed schemes in Zone 1. This is tested by increasing the retention level (market share) of expenditure for Zone 1.

Table 4.1 **Belvedere Growth Area - Convenience Goods Floorspace Capacity (m^2 net) Over Forecast Period (2015-2036)**

	Lower Population Growth Scenario (PH3)	Higher Population Growth Scenario (PH4)
Population Growth (2015-2036)*	28,968	37,759
Total Convenience Expenditure Growth (£m)**	£64.0	£81.5
Improved Expenditure Retention***	50%	50%
Retained Expenditure (£m)	£32.0	£40.7
Turnover of Committed Development ****	£20.4	£20.4
Residual Expenditure	£11.6	£20.3
Average Sales Density foodstore (per m^2)*****	£12,418	£12,418
Net Floorspace Capacity (m^2)	930	1,637

Notes:
* Equates to the increase in population between 2015 and 2036 (Appendix 2).
** Equates to the increase in total available expenditure between 2015 and 2036 (Table 3, Appendices 4a and 4b).
*** Improved retention of 50% equals the average retention level for convenience expenditure for Zones 2 to 6.
**** Assumes 78% of total convenience turnover of committed floorspace in Zone 1 (Table 1, Appendix 6) is drawn from the local catchment (Zone 1).
***** Equals the average sales density for foodstore floorspace over the period 2015 to 2036; taking account of annual growth in floorspace 'productivity'.

4.12 As the table below shows, based on the Council's two population projection scenarios (PH3 and PH4), there is indicative capacity associated with potential housing capacity in Zone 1 to support 930m^2 to 1,637m^2 (net) of new convenience floorspace in Zone 1 up to 2036. This could support a small to medium sized foodstore to help anchor a new district centre for the Belvedere area.

4.13 It should be highlighted again that the capacity figures in Table 4.1 are based on the potential to support new floorspace by testing the potential to improve expenditure retention levels for Belvedere. As a result, this indicative capacity forecast is not comparable to the forecast capacity findings in Section 6. Furthermore, the indicative capacity findings set out in Table 4.1 do not take account of trade drawn by stores in the Belvedere area from the rest of the study area and beyond (i.e. "inflow"). As a result, indicative capacity is likely to be under estimated for the two population scenarios.

COMPARISON CAPACITY

4.14 In assessing potential comparison floorspace capacity, we have applied the same approach used to quantify potential capacity convenience floorspace. We have assumed a slight increase in the level of retained comparison goods expenditure; increasing from 24.2% to 25%. This is on the basis that residents will continue to carry out main non-food shopping at larger centres such as Bexleyheath. We have also taken account of committed floorspace turnover associated with planned retail floorspace at Cross Quarter (Sainsbury's foodstore), Imperial Gateway, and Southmere Village.

4.15 The findings of the high level assessment of potential comparison floorspace capacity associated with potential housing capacity in Zone 1 are set out in the table below.

Table 4.2 **Belvedere Growth Area - Comparison Goods Floorspace Capacity (m^2 net) Over Forecast Period (2015-2036)**

	Lower Population Growth Scenario (PH3)	Higher Population Growth Scenario (PH4)
Population Growth (2015-2036)*	28,968	37,759
Total Convenience Expenditure Growth (£m)**	£245.6	£290.6
Improved Expenditure Retention	25%	25%
Retained Expenditure (£m)	£61.4	£72.7
Turnover of Committed Development ***	£10.4	£10.4
Residual Expenditure	£51.1	£62.3
Average Sales Density foodstore (per m^2)*****	£7,556	£7,556
Net Floorspace Capacity (m^2)	6,756	8,245

Notes:
* Equates to the increase in population between 2015 and 2036 (Appendix 2).
** Equates to the increase in total available expenditure between 2015 and 2036 (Table 3, Appendices 5a and 5b).
*** Assumes an average of 78% of total committed floorspace turnover in Zone 1 is drawn the local catchment (Zone 1).
**** Equals the average sales density for comparison goods floorspace over the period 2015 to 2036; taking account of annual growth in floorspace 'productivity'.

4.16 As the table above shows, there is a considerable level of indicative comparison floorspace capacity generated from expenditure associated with potential housing capacity estimates in Zone 1 over the forecast period (up to 2036); ranging from 6,756m^2 (net) to 8,245m^2 (net). A new district centre serving the housing growth areas in Zone 1 could support some of this floorspace, which could provide a range of local non-food retailers, service and leisure uses.

4.17 As with the indicative convenience capacity results, the capacity figures in Table 4.2 are based testing the potential to improve the level of comparison goods expenditure retention for Belvedere (Zone 1). The results set out in Table 4.2 do not take account of trade drawn by stores in the Belvedere area from the rest of the study area and beyond (i.e. “inflow”). As a result, indicative capacity is likely to be under estimated for each population scenario. This will also explain why capacity forecasts set out in Section 6 for Belvedere are higher for 2036 (e.g. 9,626m^2 net for Scenario PH3 to 12,250m^2 net for Scenario PH4).

4.18 To conclude, whilst this assessment sets out the potential to support new convenience and comparison floorspace to serve the potential capacity for new housing in Zone 1, the delivery of new retail will be dependent on operator demand. It is recommended that a more detailed economic and market demand assessment is carried to establish the type and range of commercial town centre facilities are required to support a new district centre for the Belvedere area.

5.0 LEISURE 'GAP' ASSESSMENT UPDATE

5.1 This section provides an update on key commercial leisure needs based on potential housing capacity forecasts for the Borough up to 2036. The update focuses on the implications of the revised population projections for key commercial leisure uses including floorspace requirements for A3 to A5 uses, cinema capacity and fitness and health club facilities.

5.2 As well as taking account of revised population projections, the update on commercial leisure needs is also informed by more up to date expenditure data and expenditure growth forecasts identified by Experian Business Strategies. Detail on commercial expenditure per capita and total available expenditure growth for key commercial leisure services in the Borough and the study zones is set out in **Appendix 7**.

5.3 In summary, growth in commercial leisure expenditure in the Borough is forecast to increase between 2015 and 2036 by 54% and 64% based on the Council's two housing population growth scenarios (PH3 and PH4). Based on the lower population growth scenario, total available commercial leisure expenditure will increase from £547.3m in 2015 to £842.6m (+£295.3m) in 2036. For the higher population growth scenario, total expenditure increases from £548.0m to £901.4m (+£353.4m) over the same period.

5.4 The greatest increase in commercial expenditure is within Zone 1 (Belvedere), with expenditure increasing from 131% (Scenario PH3) over the forecast period (2015-2036) and 162% based on a higher population growth scenario (PH4). This is linked to potential housing capacity in the Belvedere area over the forecast period.

5.5 In the context of this forecast growth in commercial leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the Borough's main centres and the likely need for new uses and facilities over the forecast period.

CINEMA

5.6 The main change in the cinema market since the 2013 RLS has been the revival of in-centre cinema schemes; with increased requirements for both multi-screens and boutique cinema formats. The growth in demand has helped to deliver sites that have originally been earmarked for new retail development, but where they have failed to secure investment or interest from retailers and developers.

5.7 The majority of key commercial led schemes coming forward in town centres across England this year include a new cinema facility. Examples of planned town centre cinema schemes which are expected to enhance town centre vitality and viability include Nottingham City (Broadmarsh Centre), Addlestone Town Centre, (Station Road), Ashford Town Centre (Elwick Place), Royal Leamington Spa Town Centre (Chandos Street), and Leeds City Centre (Trinity Walk).

5.8 Turning to Bexley Borough the number of cinemas within the Borough has remained unchanged since the 2013 Retail Study, with one cinema serving the Borough, namely the 9-screen Cineworld Cinema in Bexleyheath (Broadway).

5.9 The table below updates the requirement for additional cinema screens in the Borough, originally identified in the 2013 RLS and drawing on the Council's two population growth scenarios. The capacity for new screens is based on data from Dodona, which indicates that the average screen density for cinema provision in London is 7.5 screens per 100,000 people (British Film Institute, Statistical Yearbook 2014).

Table 5.1 **Potential Capacity for New Cinema Screens in the Borough**

	2015	2016	2021	2026	2031	2036
Lower Population Growth Scenario (PH3)						
Cinema Screen Potential	17.7	17.8	18.0	19.7	21.1	21.0
Existing Screen Provision	9	9	9	9	9	9
Residual Screen Capacity	9	9	9	11	12	12
Higher Population Growth Scenario (PH4)						
Cinema Screen Potential	18	18	19	21	23	22
Existing Screen Provision	9	9	9	9	9	9
Residual Screen Capacity	9	9	10	12	14	13

Source: Screen density for the London region is sourced from the British Film Institute Statistical Yearbook 2014.

5.10 Based on the different projected population growth scenarios we forecast the need for 9 screens at present, increasing to between 12-14 screens by 2036. This capacity could support one or two multi-screen facilities; preferably within an existing or planned town centre.

EATING AND DRINKING OUT

5.11 A review of commercial leisure expenditure review in **Appendix 7** shows that the majority of expenditure is directed to eating and drinking out. This includes expenditure in (Class A3-5) cafes, restaurants, bars and pubs (i.e. the food and beverage sector).

5.12 While the economy has yet to return to pre-recessionary levels of consumer confidence, the food and beverage sector has continued to grow, with demand for new eating and drinking facilities increasing for town centre and retail park locations. This is particularly the case for mid-range restaurant chains, such as Jamie's Italian, Byron, Carluccios, Bill's, etc. Similarly, the café market is experiencing continued success; particular for key coffee outlet chains with emerging growth for independent/ artisan café offer.

5.13 With the food and beverage sector going from strength to strength, the sector provides an increasingly important part of a town centre's wider offer and economy. Cafes, restaurants, bars and pubs complement other town centres uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip. As such, new A3-A5 provision should be supported in town centres where it does not impact on the overall retail function of key retail areas.

5.14 In order to assess the potential capacity for new eating and drinking establishments in Bexley Borough we have adopted a standard and robust approach which assumes that 15% of the forecast capacity for new comparison goods floorspace (as identified in **Section 7**) could support a mix of new leisure services including cafés, restaurants, takeaways, pubs and wine bars. This is supported by research that specifically identified that the hospitality industry, in its widest sense, "…*forms an important and sizeable proportion of premises averaging 24% of ground floor stock*"[5]. Furthermore Experian GOAD's centre reports show that on average cafes, restaurants, bars, pubs and takeaways account for over 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover. This compares to the Borough, with 12% and 17% of floorspace and outlets across the Borough's five centres accommodate A3-A5 uses as identified by Experian Goad (Appendix 2, 2013 RLS).

5.15 Our estimates of forecast A3-A5 floorspace for the Borough are therefore based on 15% of the comparison goods capacity forecasts identified in **Section 3**. The results of the analysis are set out in the table below.

Table 5.2 **Eating & Drinking Out - Projected Gross Floorspace (gross m^2)**

	2016	2021	2026	2031	2036
Lower Population Growth Scenario (PH3)					
Projected Comparison Floorspace (gross m^2)	266	4,901	25,918	47,920	57,059
15% of Comparison Floorspace to A3/A4/A5 Uses (gross m^2)	40	735	3,888	7,188	8,559
Higher Population Growth Scenario (PH4)					
Projected Comparison Floorspace (gross m^2)	334	13,425	35,336	60,465	70,097
15% of Comparison Floorspace to A3/A4/A5 Uses (gross m^2)	50	2,014	5,300	9,070	10,515

Source: Table 16a, Appendices 5a and 5b

[5] The Streetscape of major UK cities', Savills (Winter 2004, pg.3).

5.16 Based on the Council's lower housing population growth scenario (PH3), the table shows that there is a potential quantitative need for 3,888m^2 (gross) of Class A3-A5 gross floorspace in the Borough by 2026; increasing to 8,559m^2 (gross) by 2036. Forecast provision increases to 5,300m^2 (gross) in 2026 and 10,515m^2 (gross) by 2036 when based on comparison goods capacity projections derived from the higher housing population growth scenario (PH4).

5.17 As previously advised in the 2013 RLS, forecast need for new Class A3-A5 floorspace should be directed to Bexleyheath to help increase competition and choice, and to help stimulate the centre's daytime/evening economies in accordance with national and local policies. Notwithstanding this, new A3-A5 floorspace should also be supported within the Borough's network of centres to help strengthen centre vitality and viability; particularly in Erith where the 2013 RLS identified a qualitative need for eating and drinking out facilities. Furthermore, some of the forecast A3-A5 floorspace could support new eating and drinking out facilities as part of a potential new District Centre to serve potential housing capacity in the Belvedere area.

5.18 It should be noted that the potential to meeting any forecast need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there.

HEALTH & FITNESS

5.19 The health and fitness market has remained largely unchanged since 2013, with key brands (e.g. Virgin Active, Fitness First, Bannatynne, etc.) continuing to increase their presence in key centres. Similarly, the growth in the budget gym/ 24-hour gym market remains strong, particularly from leading brands such as PureGym and EasyGym.

5.20 Like with the trend for new cinema development, the growth of the health and fitness sector has been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

5.21 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. Tables 8a and 8b (**Appendix 8**) shows that using the Borough's average participation rate of 34.5%[6] identified by the household survey,

[6] Participation rate identified from the household survey.

this would potentially result in an additional 14,938 to 21,552 new gym and health and fitness members over the forecast period (2015 to 2036).

5.22 Based on average membership rates for private fitness clubs[7], this would support 5 to 8 new gym facilities in the Borough up to 2036 based on lower and higher population growth scenarios, respectively. Alternatively, the Borough could support four to 6 new budget chain gyms.

5.23 While some of the forecast capacity to support new health and fitness facilities will be absorbed by existing facilities, the considerable increase in the Borough's population is expected to increase demand for new modern facilities. Potential housing capacity in Erith and the Belvedere serve as key locations to direct investment for new fitness and healthclub facilities. There is also an opportunity to link new leisure facilities with future development at Wilton Road/ Abbey Wood Neighbourhood Centre, which will benefit from an influx of commuters on completion of the Crossrail station. Furthermore, the Council should continue to promote new facilities in Bexleyheath Town Centre and as part of a potential new District Centre for the Belvedere area.

5.24 It should be noted that forecast capacity for gym facilities will be dependent on the level of market interest and demand. Given that some of the larger chain operators are not represented in the Borough, there may be scope for a new branded facility. There could also be potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the Borough.

[7] Average membership numbers for large fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) equals 2,897 while budget chains are higher at 3,452 members as sourced from the 2014 State of the UK Fitness Industry report by the Leisure Database Company.

6.0 SUMMARY AND CONCLUSIONS

6.1 This report provides an update on the quantitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses in the Borough area and its main centres. The findings supersede the results of the 2013 RLS.

6.2 The update has been informed by revised population projections for the Borough and study zones associated with potential housing capacity up to 2036. In addition, the update takes account of revised expenditure data and expenditure growth forecasts as well new store openings and committed development since 2013.

6.3 This final section summarises the study's key findings and sets out high level advice on how the local planning authority can effectively plan for, manage and accommodate identified the forecast retail and commercial leisure needs in the Borough.

FORECAST RETAIL FLOORSPACE

6.4 The Borough-wide forecasts for convenience and comparison floorspace up to 2036 are summarised in the table below, based on the Council's two population growth scenarios.

Table 6.1 **Borough-wide Retail Capacity**

	2016	2021	2026	2031	2036
SCENARIO PH3 – LOWER HOUSING GROWTH					
Convenience Floorspace (m^2 net):	-4,915	-3,445	455	3,820	4,468
Comparison Floorspace (m^2 net):	186	3,430	18,143	33,544	39,942
SCENARIO PH4 – HIGHER HOUSING GROWTH					
Convenience Floorspace (m^2 net):	-4,900	-1,481	2,411	6,768	7,421
Comparison Floorspace (m^2 net):	234	9,398	24,735	42,325	49,068

Source: Table 16a, Appendices 7a & 7b; and Table 16a (Appendices 5a & 5b)

6.5 In summary, there is a considerable level of forecast convenience and comparison floorspace capacity identified in the Borough; in particular based on the Council's higher population growth scenario.

6.6 The level of forecast convenience and comparison retail floorspace increases further when discounting the planning permission for the Tesco Superstore in Bexleyheath, which we understand is no longer coming forward for development.

6.7 The assessment of localised retail floorspace need for the Borough's five main centres (Bexleyheath, Crayford, Erith, Sidcup and Welling) and the Belvedere area shows varying capacity forecasts for new retail floorspace across the different centres and against the Council's two population growth scenarios.

6.8 The convenience and comparison retail capacity results for the each of the five centres/ zones are summarised in the table below.

Table 6.2 **Forecast Retail Capacity: Borough's Main Centres & Zones (m^2 net)**

	Scenario	2016	2021	2026	2031	2036
CONVENIENCE FLOORSPACE						
Bexleyheath Strategic Centre (Zone 4)	PH3	-2,850	-2,563	-1,775	-1,050	-872
	PH4	-2,848	-2,220	-1,407	-572	-392
Crayford District Centre (Zone 5)	PH3	75	338	872	1,299	1,412
	PH4	77	560	1,049	1,742	1,856
Erith District Centre (Zone 2)	PH3	38	367	1,178	1,794	1,876
	PH4	44	830	1,503	2,721	2,805
Welling District Centre (Zone 3)	PH3	35	197	514	793	874
	PH4	35	294	640	884	965
Sidcup District Centre (Zone 6)	PH3	39	153	281	395	454
	PH4	39	162	295	413	471
Belvedere Area (Zone 1)	PH3	-2,293	-2,228	-1,388	-572	-538
	PH4	-2,292	-1,600	-570	-6	29
Rest of Borough (Zones 1-6)	PH3	41	291	772	1,161	1,261
	PH4	44	492	901	1,586	1,688
COMPARISON FLOORSPACE						
Bexleyheath Strategic Centre (Zone 1)	PH3	-536	964	8,264	16,018	19,070
	PH4	-513	4,072	11,810	20,353	23,575
Crayford District Centre (Zone 5)	PH3	-289	193	1,762	3,370	4,211
	PH4	-281	639	2,090	4,375	5,255
Erith District Centre (Zone 2)	PH3	213	358	790	1,168	1,344
	PH4	217	522	894	1,563	1,755
Welling District Centre (Zone 3)	PH3	68	150	477	828	1,039
	PH4	68	212	539	928	1,142
Sidcup District Centre (Zone 6)	PH3	469	599	1,044	1,516	1,851
	PH4	470	657	1,109	1,608	1,946
Belvedere Area (Zone 1)	PH3	-188	468	4,318	8,359	9,626
	PH4	-176	2,452	6,685	10,885	12,250
Rest of Study Area (Zones 2-6)	PH3	448	698	1,488	2,285	2,802
	PH4	450	843	1,608	2,614	3,144

Source: Tables 19-25, Appendices 7a & 7b and Tables 17-23, Appendices 5a & 5b

6.9 A higher quantum of convenience floorspace capacity is identified for Bexleyheath after discounting the turnover associated with the planning permission for the Tesco Superstore in Bexleyheath.

6.10 We advise that the identified forecast floorspace for convenience and comparison floorspace should be directed Bexleyheath Town Centre first in order to strengthen the centre's role as the Borough's principal shopping destination. This will help to reduce leakage to competing centres outside of the district and the potential to increase the centre's market share through the 'claw back' of leaked expenditure.

6.11 Notwithstanding this, the Council should also promote the role of the Borough's other main centres by encouraging new retail development within the centres; particularly those centres serving strategic housing growth areas (e.g. Erith District Centre). The potential to create a new district centre for to serve potential housing capacity estimates for the Belvedere area should be considered.

6.12 Furthermore, residual capacity for new convenience and comparison goods floorspace in the rest of the Study Area should be directed to the Borough's existing network of centres and/ or in support of new centres to serve planned housing and potential strategic housing areas in the Borough.

6.13 We recommend that further analysis is undertaken to identify key sites to support town centre development in Bexleyheath and the District Centres, which will help to ensure new development is directed to town centres first. This should also include the identification of sites to accommodate retail development for a new district centre for Belvedere.

ACCOMMODATING RETAIL GROWTH IN BELVEDERE

6.14 An indicative assessment of retail capacity associated with planned housing and future potential housing capacity in the Belvedere area has identified localised forecast capacity after taking account of the potential to improve convenience expenditure retention in Zone 1 (Belvedere) and expenditure drawn to committed convenience retail floorspace in the area.

6.15 In summary, the growth in population of Zone 1 based on the Council's two population projections could potentially support between 930m^2 (net) and 1,637m^2 (net) of convenience floorspace. This is the equivalent of a small to medium-sized foodstore. The indicative assessment also identifies the potential to support new comparison goods floorspace.

6.16 Together the capacity findings for convenience and comparison floorspace indicate a sufficient quantum of retail capacity to support a new district centre to serve the future population associated with potential housing capacity forecasts for Zone 1. This will help to support a sustainable, vital and viable town centre to serve the future population of the area, which meets the aims of the NPPF.

6.17 We recommend that further analysis is recommended to identify the best location for a new district centre and the potential mix of town centre uses to create a viable centre.

COMMERCIAL LEISURE NEEDS ASSESSMENT

6.18 An update of the commercial leisure needs assessment focused on the key leisure services including cinema provision, eating and drinking out facilities, and health and fitness facilities.

6.19 The assessment findings show that based on the Council's population scenarios there is the potential to support one to two new **cinemas** in the Borough over the forecast period (2015 to 2036). With cinema-led development schemes currently leading town centre regeneration across England, this highlights the potential opportunity to promote a new cinema scheme within one or more of the Borough's main centres. This could include the extension of existing cinema screens in Bexleyheath and/or the provision of a new cinema in one of the District Centres. There is also the potential to include a cinema venue as part of a new district centre to serve significant potential housing capacity in the Belvedere area.

6.20 In assessing the potential for new **eating and drinking out** facilities in the Borough and main centres, it is assumed that 15% of identified comparison goods floorspace (gross) could be used accommodate A3 to A5 uses (e.g. cafes, restaurants, bars, takeaways, etc.). This identifies between 8,559m^2 and 10,515m^2 of new A3 to A5 floorspace in the Borough, the majority of which should be directed to Bexleyheath to support the day to evening time economy and promote the centre as a key leisure destination. New A3-A5 floorspace should also be supported across the Borough's four District Centres where there is market demand, as well as support new food and beverage facilities for a potential new district centre for the Belvedere area.

6.21 The growth in population over the forecast period will also increase demand for health and fitness facilities in the Borough. Based on average membership numbers for key gym chains and taking account of participation rates for gyms identified in the 2013 household survey (2013 Retail Study), there is potential capacity to support 5 to 8 new gym facilities in the Borough. New facilities should be directed to town centre locations; in particular Bexleyheath as well as key transport nodes including Abbey Wood, which will benefit from an influx of commuters on completion of Crossrail.

7.0 GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE OF CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.

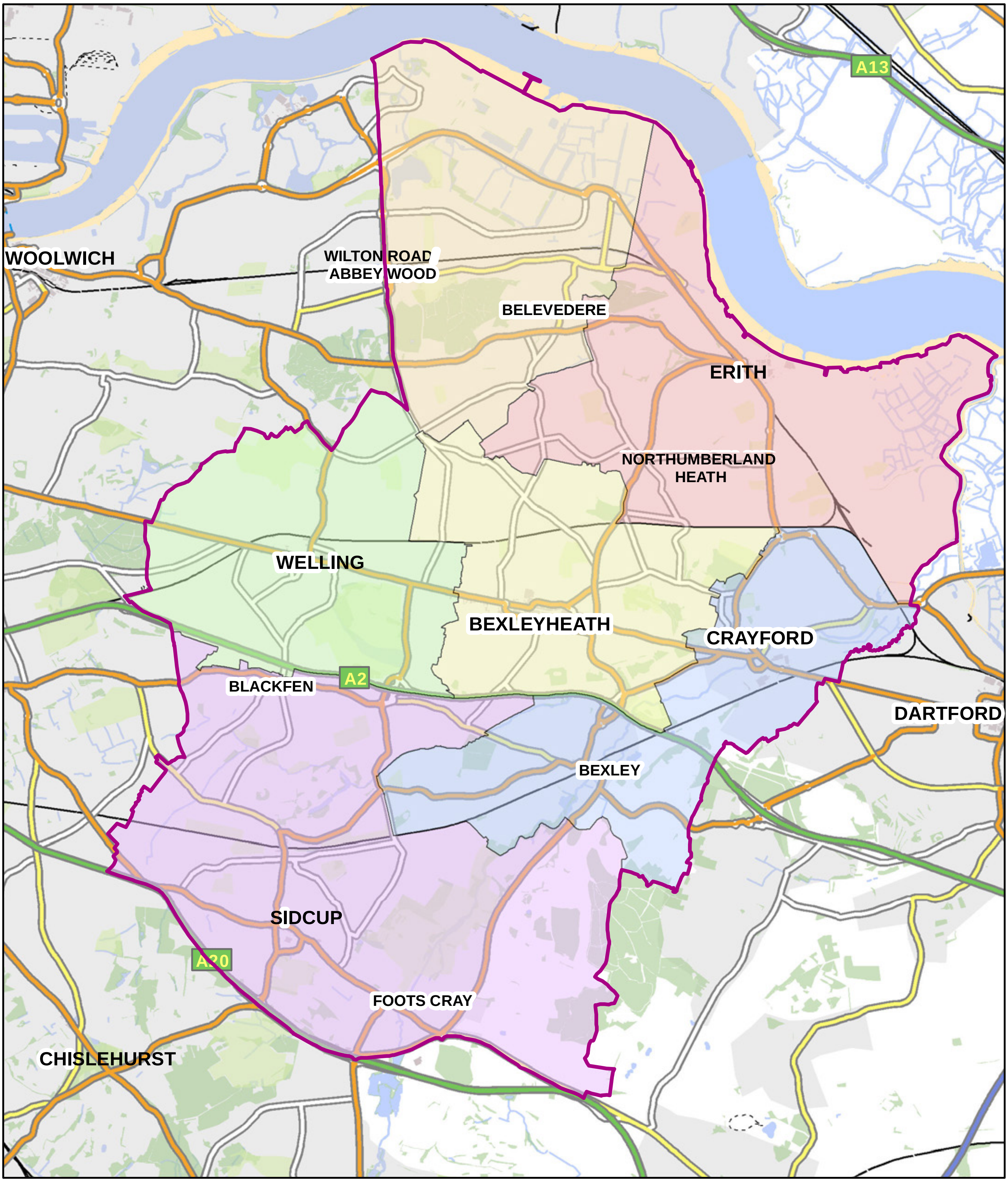
OUT-OF CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively

	by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE PRODUCTIVITY' ('EFFICIENCY) GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

– END –

APPENDIX 1: STUDY AREA

Study Area and Zones



Study Area Boundary
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6

APPENDIX 2: POPULATION PROJECTION SCENARIOS

TABLE 1: POPULATION GROWTH SCENARIO PH3 - BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	37,130	37,580	37,487	52,434	66,780	66,098	41.2%	78.0%
ZONE 2	Erith	45,450	45,476	48,554	53,682	55,892	55,726	18.1%	22.6%
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467	0.4%	-0.2%
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282	2.7%	7.1%
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,573	25,432	25,785	25,645	6.6%	7.5%
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350	0.3%	0.0%
STUDY AREA TOTAL:		236,296	237,371	240,196	262,609	280,919	279,567	**11.1%**	**18.3%**

Source: London Borough of Bexley (December 2014)
Notes: Scenario PH3 population projections are based on planned housing delivery by ward over the period 2011 to 2036.. $

TABLE 2: POPULATION GROWTH SCENARIO PH4 - BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	37,130	37,580	49,895	69,338	75,706	74,889	86.7%	101.7%
ZONE 2	Erith	45,804	45,918	51,467	52,956	66,181	65,853	15.6%	43.8%
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467	0.4%	-0.2%
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282	2.7%	7.1%
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,951	26,040	26,391	26,242	9.2%	10.0%
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350	0.3%	0.0%
STUDY AREA TOTAL:		236,650	237,814	255,894	279,394	300,740	299,082	**18.1%**	**26.4%**

Source: London Borough of Bexley (December 2014)
Notes: Scenario PH4 population projections are based on housing delivery by ward over the period 2011 to 2036. $

TABLE 3: EXPERIAN POPULATION GROWTH - BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2026-2036
ZONE 1	Belvedere	36,530	36,895	38,775	40,631	42,369	44,335	11.2%	21.4%
ZONE 2	Erith	46,279	46,734	49,056	51,364	53,557	56,022	11.0%	21.1%
ZONE 3	Welling	45,083	45,516	47,733	49,924	52,013	54,377	10.7%	20.6%
ZONE 4	Bexleyheath	32,843	33,175	34,860	36,531	38,113	39,893	11.2%	21.5%
ZONE 5	Crayford/Old Bexley	23,749	23,979	25,162	26,340	27,452	28,707	10.9%	20.9%
ZONE 6	Sidcup	56,619	57,165	59,989	62,788	65,385	68,326	10.9%	20.7%
STUDY AREA TOTAL:		241,103	243,464	255,575	267,578	278,889	291,660	**11.0%**	**21.0%**

Source: Experian MMG3 $
Notes: Population projections based the ONS's 2012-based Sub National Population Projections released in May 2014. $

APPENDIX 3: RETAIL TRENDS UPDATE

1.0 NATIONAL RETAIL TRENDS

1.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

RETAIL TRENDS

Retail Expenditure Growth

1.2 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further.

1.3 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest *Retail Planner Briefing Note 12.1* (October 2014).

Table 1.1 **Actual and Forecast Annual Retail Expenditure Growth**

Volume Growth per head (%):	ACTUAL GROWTH						FORECASTS		TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015 25	1973 2013	1993 2013
Total Retail Spend	1.7	-3.1	0.3	-0.8	1.2	2.3	3.3	2.4	2.7	3.6
Convenience Goods:	-4.9	-5.0	-0.8	-2.7	-0.5	-1.3	-0.5	0.6	0.2	-0.2
Comparison Goods:	4.7	-2.4	0.9	0.5	2.6	4.6	5.6	3.3	4.5	5.9

Source: Experian Retail Planner Briefing Note 12.1 (October 2014); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1973-2013 (the '*ultra long-term'* trend) and for 1993-2013 (the '*medium-term'* trend).

1.4 Although there has been negative annual growth in convenience goods expenditure per capita levels since 2008, the forecasts for 2015-25 show positive growth of +0.6% per annum on average. This is above previous historic long term trends of around +0.2% per annum.

1.5 For comparison goods Experian forecast that annual growth rates are recovering from a low of -2.4% in 2009, to +4.6% in 2013 and a stronger annual growth of +5.6% for 2014. Experian forecast that growth will average +3.3% per annum for the period 2015-2025, which is well below historic trends of between 4.5% and 5.9% per annum.

1.6 In summary there are positive signs of improvement in the UK economy and consumer and business confidence in 2014. Notwithstanding this, it is clear that the retail sector is highly vulnerable to changes in the UK economy (and how it responds in the future to changes in the Eurozone and global economies) and the fact that the forecast growth in retail sales volumes will be much lower and slower than in recent history.

Special Forms of Trading and Internet Shopping

1.7 *Special Forms of Trading* (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

1.8 Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2014) value of internet sales is £37.2bn (current prices) and other (non-internet) SFT sales stand at approximately £8.3bn. This results in total SFT sales of £45.5bn in 2013, which represents a circa 165% increase from £17.1bn recorded in 2006. Overall the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 13% in 2014. This significant growth has been fuelled by internet shopping, which had increased its share of total retail sales from 4.7% in 2008 to 10.6% in mid-2014.

1.9 Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (the most recent examples being HMV and Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear.

1.10 The table below sets out Experian's latest forecasts of the growth in the total market share of SFT between 2014 and 2035, based on retail spending growth assumptions and predictions as to the future take-up and expansion of internet shopping[1]. Experian do not identify growth beyond 2035. Therefore, it is assumed that the level of growth for 2036 will be similar to growth identified for 2035.

[1] Please note that although no official data is available for convenience and comparison goods, EBS have provided their own market share estimates.

Table 1.2 **The forecast growth in SFT's market share of total retail sales**

	2014	2019	2024	2030	2035
TOTAL:	13.0%	17.8%	19.6%	20.1%	20.3%
Comparison	15.6%	20.4%	21.3%	20.8%	20.3%
Convenience	8.5%	12.8%	15.9%	18.1%	18.2%

Source: Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

1.11 EBS forecast that non-store retailing will continue to grow rapidly over the short to medium term, outpacing traditional forms of spending. They predict that this growth will be sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping, but will slow after 2020. As highlighted previously, Experian do not identify growth beyond 2035. Therefore, it is assumed that forecast growth for SFT in 2036 will be similar to growth identified for 2035.

1.12 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('*bricks-and-mortar*') retail space, rather than from '*virtual*' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares to reflect the proportion of internet sales sourced from existing stores.

Table 1.3 **Adjusted SFT's market shares**

	2014	2019	2024	2030	2035
TOTAL:	8.4%	11.4%	12.5%	12.8%	12.9 %
Comparison	11.7%	15.3%	16.0%	15.5%	15.2%
Convenience	2.6%	3.8%	4.7%	5.6%	6.1%

Source: Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

1.13 Although the growth in online sales has, and will inevitably continue to impact on the need for traditional shops, some commentators believe that the development of multi-channelling as part of retailers' business models will result in internet shopping actually driving demand for 'bricks-and-mortar' stores. This may be due to the need for '*click-and-collect'* facilities in easily accessible locations (for example, on the high street, in existing out-of-centre stores or at important transport nodes), or for '*showrooms*' where customers can view and test products in store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support demand for retail space over time.

Floorspace 'Productivity' Growth

1.14 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as rents, rates and service charges) to help maintain their profitability and viability. It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing comparison and convenience goods retail floorspace.

1.15 However there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. However following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

1.16 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for non-store retailing.

Table 1.4 **Productivity Growth in Retail Floorspace**

	2013	2014	2015	2016	2017 21	2022 35
Comparison	-1.8	-1.4	-0.3	-0.4	-0.2	+0.1
Convenience	+4.3	+5.3	+3.8	+2.3	+2.0	+2.2

Source: Figures 4a and 4b (Addendum), Experian *Retail Planner Briefing Note 1.1* (October 2014)

1.17 The forecasts show that the scope for sales density growth is very limited for convenience goods. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of close to +2.5% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century[2].

RETAIL DEVELOPMENT PIPELINE

1.18 The retail development pipeline slowed dramatically during the economic downturn compared with the shopping centre 'boom' experienced in the ten year period up to 2007. One of the key impacts has been to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

[2] Please note that the floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in Section 9 of this study.

1.19 The latest *Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) in 2013 confirms that the quantum of completed new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m^2 in 2009, 232,000m^2 in 2010 and 280,000m^2 in 2011, no new floorspace opened in 2012. The quantum of retail development in the pipeline is also continuing to decline, with shopping centre proposal levels falling by 37% from a peak of 30 million m^2 in March 2009 to 19 million m^2 in June 2013 (CBRE data[3]). This trend is anticipated to continue over the short term at least to 2015/16.

1.20 Notwithstanding this, the BCSC research also identified the first significant signs of new development activity in 2013 following the opening of circa 140,000m^2 of new retail floorspace (including Trinity Leeds). This is set to continue with a number of major schemes opening in 2014 and 2015, including Grand Central in Birmingham and Old Market in Hereford. There are also positive signs that new investment is returning to the shopping centre market from UK-based and international funds seeking assets in prime and secondary locations that offer the potential for growth.

1.21 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 100' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, or require a new approach if they are to secure new shopping centre development in the future. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "*golden decade*" of shopping centre development between 1997 and 2007.

RETAILER REQUIREMENTS

1.22 The economic downturn, in combination with other trends (such as changes in customer requirements, planning legislation and the growth in internet shopping), has created a need for retailers to review and rapidly adapt their business strategies, requirements and store formats. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm. The following highlights some of the key trends that are occurring in the convenience and comparison goods retail sectors.

[3] CBRE (June 2013) UK Shopping Centres in the Pipeline

Convenience Goods Retailing

1.23 The changes in the food and grocery sector over the last decade illustrate the dynamic changes in the retail industry. Some of the key trends include:

- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further, including for example the Tesco 'Express', Sainsbury's 'Local' and 'Little Waitrose' formats.
- The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response, this has resulted in the expansion of own-brand 'value' ranges by the established grocers.
- An increase in the non-food sale areas of larger superstores over the last decade, including the development of own-label clothing. In some of the stores operated by Tesco (i.e. the 'Extra' format) and Asda, for example, a significant proportion of sales area (over 50%) is often set aside for non-food retailing.
- The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping.

1.24 Over the last 12-18 months, however, the focus for the main foodstore operators has shifted to opening more convenience store formats, and growing their market shares of online sales. At the same time applications for large store formats have slowed significantly. Furthermore, Tesco and Morrisons have recently announced that they intend to dispose of some of their under-performing superstores, and Tesco is not now going to develop some 49 foodstores with extant planning permissions, including sites in Basingstoke and Dartford. This will inevitably have implications for the scale and type of new floorspace required by foodstore operators across the UK.

Comparison Goods Retailing

1.25 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, Bank, Austin Reed, etc.).

1.26 Within town centres, some traditional high street multiple operators are also changing their formats and requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively looking for larger format new-build or existing stores in out-of-centre locations to accommodate new retail formats (such as John Lewis at Home) and display their full range of products. These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

1.27 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

1.28 The out-of-centre sector has also not been immune to change. Since 2007 there has been a notable downturn in the demand from traditional 'bulky goods' retailers for new space. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000m^2 gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Other 'bulky goods' operators have simply gone out of business (such as Focus DIY). More recently B&Q announced the closure of 60 stores across the UK portfolio. Notwithstanding this, out-of-centre retailing still accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example recent research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres[4].

[4] http://www.acs.org.uk/en/research/planning.cfm referenced in Why Our High Streets Still Matter: A Think Piece by Mary Portas, 30th May 2014.

APPENDIX 4A: CONVENIENCE CAPACITY ASSESSMENT UPDATE - LOWER POPULATION GROWTH SCENARIO

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CONVENIENCE GOODS CAPACITY - SCENARIO PH3 (LOWER POPULATION GROWTH)

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	37,130	37,580	37,487	52,434	66,780	66,098
ZONE 2	Erith	45,450	45,476	48,554	53,682	55,892	55,726
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,573	25,432	25,785	25,645
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350
STUDY AREA TOTAL:		**236,296**	**237,371**	**240,196**	**262,609**	**280,919**	**279,567**

Source: London Borough of Bexley (March 2015)
Notes: Scenario PH3 population projections are based on planned housing delivery by ward over the period 2011 to 2036

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£1,829	£1,830	£1,861	£1,905	£1,951	£1,995
ZONE 2	Erith	£1,888	£1,890	£1,921	£1,967	£2,014	£2,060
ZONE 3	Welling	£2,093	£2,095	£2,130	£2,180	£2,232	£2,283
ZONE 4	Bexleyheath	£2,122	£2,124	£2,159	£2,211	£2,263	£2,315
ZONE 5	Crayford/Old Bexley	£2,120	£2,122	£2,157	£2,208	£2,261	£2,312
ZONE 6	Sidcup	£2,157	£2,159	£2,195	£2,247	£2,301	£2,353

Source: Average spend per capita estimates for each zone are derived from Experian *'2013 - Retail Area Planner'* Reports (2013 prices).
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian Retail Planner Briefing Note 12.1 (October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£67.9	£68.8	£69.8	£99.9	£130.3	£131.9	47.1%	94.2%
ZONE 2	Erith	£85.8	£85.9	£93.3	£105.6	£112.6	£114.8	23.0%	33.8%
ZONE 3	Welling	£91.1	£91.1	£92.2	£95.3	£97.8	£99.2	4.6%	8.9%
ZONE 4	Bexleyheath	£67.9	£68.0	£69.1	£72.6	£76.9	£79.4	7.0%	16.9%
ZONE 5	Crayford/Old Bexley	£50.6	£51.7	£53.0	£56.2	£58.3	£59.3	11.1%	17.3%
ZONE 6	Sidcup	£117.2	£117.5	£119.0	£122.4	£125.8	£127.9	4.5%	9.1%
TOTAL		**£480.5**	**£483.1**	**£496.4**	**£552.0**	**£601.6**	**£612.4**	**14.9%**	**27.5%**

Source: Expenditure calculated from Tables 1 & 2.

TABLE 4: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
		%	%	%	%	%	%	%
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op		3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Budgens		1.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%
Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	**5.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons		17.4%	39.5%	0.7%	4.6%	3.7%	0.0%	10.5%
Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.4%
	SUB TOTAL:	**18.3%**	**41.1%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**10.9%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.0%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.4%
Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.1%
Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
	SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.8%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda		10.5%	8.4%	16.2%	26.4%	12.5%	6.7%	13.0%
Sainsbury's		1.5%	2.0%	2.3%	10.2%	5.6%	2.0%	3.6%
Marks & Spencer		1.7%	2.9%	1.3%	5.6%	4.8%	1.1%	2.6%
Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
	SUB TOTAL:	**14.0%**	**13.9%**	**19.9%**	**43.3%**	**23.1%**	**10.1%**	**19.6%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**5.2%**	**1.0%**	**0.6%**	**1.5%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's		6.8%	14.3%	4.3%	21.1%	29.7%	5.0%	11.8%
Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
	SUB TOTAL:	**6.8%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**12.1%**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	23.3%	6.6%
Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.2%
	SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**24.2%**	**6.8%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.2%**
NEIGHBOURHOOD CENTRES:								
Zone 1: Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1: Tesco Express, Picardy Street		4.6%	1.4%	0.0%	0.0%	0.1%	0.0%	0.9%
Zone 2: Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3: Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4: Bexleyheath		1.9%	2.3%	1.8%	10.7%	0.7%	0.4%	2.8%
Zone 5: Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6: Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	6.1%	1.6%
Zone 6: Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6: North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
	SUB TOTAL:	**7.4%**	**5.9%**	**10.3%**	**13.9%**	**3.2%**	**8.9%**	**8.6%**
ALL OTHER LOCAL STORES	**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.7%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**60.2%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**67.9%**	**81.7%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley		0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton		0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford		1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.2%
Eltham		0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside		0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater		0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe		0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich		0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington		0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup		0.1%	0.0%	1.9%	0.8%	9.3%	16.9%	5.5%
Thamesmead (Morrisons)		29.6%	0.7%	2.1%	0.4%	0.0%	0.0%	4.6%
Thamesmead (Other)		1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich		0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores		1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA		**39.8%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**32.1%**	**18.3%**
TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone

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TABLE 5: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (£m)

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
TOTAL AVAILABLE SPEND (£M):	£67.9	£85.8	£91.1	£67.9	£50.6	£117.2	£480.5
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Budgens	£1.3	£0.3	£0.0	£0.0	£0.0	£0.0	£1.5
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£11.8	£33.9	£0.6	£3.1	£1.9	£0.04	£51.4
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.7	£0.0	£0.0	£0.0	£0.0	£10.0
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£19.5	£1.9	£0.2	£2.9	£25.5
Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
Tesco Express	£0.0	£0.2	£1.3	£0.2	£0.3	£1.5	£3.5
Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.5
Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£7.2	£7.2	£14.7	£18.0	£6.3	£7.9	£61.3
Sainsbury's	£1.0	£1.7	£2.1	£6.9	£2.8	£2.4	£17.0
Marks & Spencer	£1.1	£2.5	£1.2	£3.8	£2.4	£1.2	£12.4
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.5	£0.5	£0.7	£7.0
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£4.6	£12.3	£4.0	£14.3	£15.0	£5.8	£56.1
Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£3.9	£27.3	£32.2
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.8
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£3.1	£1.2	£0.0	£0.0	£0.0	£0.0	£4.4
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.5
Zone 3: Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4: Bexleyheath	£1.3	£2.0	£1.6	£7.3	£0.4	£0.5	£13.0
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£7.2	£8.0
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£2.9
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES	£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£40.9**	**£79.6**	**£85.7**	**£66.0**	**£38.9**	**£79.6**	**£390.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford	£1.0	£0.9	£0.3	£0.2	£2.0	£1.6	£6.0
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington	£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.7	£19.8	£26.9
Thamesmead (Morrisons)	£20.1	£0.6	£1.9	£0.3	£0.0	£0.0	£22.9
Thamesmead (Other)	£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores	£0.9	£0.1	£0.1	£0.6	£3.8	£6.5	£12.0
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£27.0**	**£6.2**	**£5.4**	**£1.9**	**£11.6**	**£37.6**	**£89.7**
TOTAL MARKET SHARE:	**£67.9**	**£85.8**	**£91.1**	**£67.9**	**£50.6**	**£117.2**	**£480.5**

Notes: Available expenditure in each zone has been allocated to all existing stores/floorspace based on the market share analysis (%) set out in Table 4.

TABLE 6: NEW CONVENIENCE RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	2015 Turnover	Estimated Trade Draw				
				Zone 1	Zone 2	Zone 4	Zone 6	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%	%	%
Asda , Station Road, Belevedere	2170	£13,400	£29.1	50%	15%			35%
Waitrose, High Street, Sidcup	531	£12,500	£6.6	0%	0%	0%	65%	35%
Sainsbury's Local, 287 Brampton Rd, near Bexleyheath	313	£13,200	£4.1	0%	0%	80%	0%	20%

Notes: Elsewhere equates to trade draw from outside of the Borough

TABLE 7a: ALL CONVENIENCE GOODS SHOPPING - REVISED 2015 MARKET SHARE ANALYSIS (%)

		ZONE 1 Belvedere %	ZONE 2 Erith %	ZONE 3 Welling %	ZONE 4 Bexleyheath %	ZONE 5 Crayford/ Old Bexley %	ZONE 6 Sidcup %	TOTAL %
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op		2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Budgens		0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	**3.7%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**SUB TOTAL:**	**21.4%**	**5.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons		12.1%	36.0%	0.7%	4.6%	3.7%	0.0%	9.3%
Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.4%
	SUB TOTAL:	**13.0%**	**37.6%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**9.8%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.3%
Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.0%
Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
	SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.6%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda		7.3%	6.9%	16.2%	26.0%	12.5%	6.5%	11.9%
Sainsbury's		1.5%	2.0%	2.3%	9.7%	5.6%	2.0%	3.5%
Marks & Spencer		1.7%	2.9%	1.3%	5.2%	4.8%	1.1%	2.5%
Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
	SUB TOTAL:	**10.8%**	**12.4%**	**19.9%**	**41.8%**	**23.1%**	**9.9%**	**18.2%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**4.7%**	**1.0%**	**0.6%**	**1.4%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's		4.7%	14.3%	4.3%	21.1%	29.7%	5.0%	11.4%
Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
	SUB TOTAL:	**4.7%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**11.7%**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	21.3%	6.2%
Waitrose		0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.9%
Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.2%
	SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**25.9%**	**7.3%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.3%**
NEIGHBOURHOOD CENTRES:								
Zone 1: Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1: Tesco Express, Picardy Street (to close)		3.5%	1.4%	0.0%	0.0%	0.1%	0.0%	0.8%
Zone 2: Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3: Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4: Bexleyheath		1.9%	2.3%	1.8%	7.8%	0.7%	0.4%	2.3%
- including Sainsbury's 287 Local Brampton Road		0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.7%
Zone 5: Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6: Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	5.4%	1.5%
Zone 6: Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6: North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
	SUB TOTAL:	**6.3%**	**5.9%**	**10.3%**	**15.9%**	**3.2%**	**8.1%**	**8.5%**
ALL OTHER LOCAL STORES	**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.8%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**67.7%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**68.7%**	**82.6%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley		0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton		0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford		1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.3%
Eltham		0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside		0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater		0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe		0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich		0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington		0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup		0.1%	0.0%	1.9%	0.8%	9.3%	16.2%	5.4%
Thamesmead (Morrisons)		22.1%	0.7%	2.1%	0.4%	0.0%	0.0%	3.7%
Thamesmead (Other)		1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich		0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores		1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA		**32.3%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**31.3%**	**17.4%**
TOTAL MARKET SHARE:		**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
TOTAL AVAILABLE FOOD SPEND (£M):	**£67.9**	**£85.8**	**£91.1**	**£67.9**	**£50.6**	**£117.2**	**£480.5**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£14.54	£4.36	£0.00	£0.00	£0.00	£0.00	£18.9
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£8.2	£30.9	£0.6	£3.1	£1.9	£0.0	£44.7
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.7	£0.0	£0.0	£0.0	£0.0	£10.0
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£19.5	£1.9	£0.2	£2.9	£25.5
Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
Tesco Express	£0.0	£0.2	£1.3	£0.2	£0.3	£1.5	£3.5
Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.5
Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£5.0	£5.9	£14.7	£17.6	£6.3	£7.6	£57.2
Sainsbury's	£1.0	£1.7	£2.1	£6.6	£2.8	£2.4	£16.7
Marks & Spencer	£1.1	£2.5	£1.2	£3.5	£2.4	£1.2	£12.0
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.2	£0.5	£0.7	£6.7
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.2	£12.3	£4.0	£14.3	£15.0	£5.8	£54.6
Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£3.9	£24.9	£29.8
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.8
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.7
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.5
Zone 3: Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4: Bexleyheath (including Sainsbury's Local Brampton Road)	£1.3	£2.0	£1.6	£8.6	£0.4	£0.5	£14.3
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.3	£7.1
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£2.9
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES	£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£46.0**	**£79.6**	**£85.7**	**£66.0**	**£38.9**	**£80.5**	**£396.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford	£1.0	£0.9	£0.3	£0.2	£2.0	£1.6	£6.0
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington	£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.7	£19.0	£26.0
Thamesmead (Morrisons)	£15.0	£0.6	£1.9	£0.3	£0.0	£0.0	£17.8
Thamesmead (Other)	£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores	£0.9	£0.1	£0.1	£0.6	£3.8	£6.5	£12.0
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£21.9**	**£6.2**	**£5.4**	**£1.9**	**£11.6**	**£36.7**	**£83.8**
TOTAL MARKET SHARE:	**£67.9**	**£85.8**	**£91.1**	**£67.9**	**£50.6**	**£117.2**	**£480.5**

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TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
TOTAL AVAILABLE FOOD SPEND (£M):	**£68.8**	**£85.9**	**£91.1**	**£68.0**	**£51.7**	**£117.5**	**£483.1**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£14.73	£4.4	£0.0	£0.0	£0.0	£0.0	£19.1
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£8.3	£30.9	£0.6	£3.1	£1.9	£0.0	£44.9
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.7	£0.0	£0.0	£0.0	£0.0	£10.0
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£19.5	£1.9	£0.3	£2.9	£25.5
Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
Tesco Express	£0.0	£0.2	£1.3	£0.2	£0.3	£1.5	£3.5
Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.6
Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£5.0	£5.9	£14.7	£17.7	£6.5	£7.7	£57.5
Sainsbury's	£1.1	£1.7	£2.1	£6.6	£2.9	£2.4	£16.8
Marks & Spencer	£1.2	£2.5	£1.2	£3.5	£2.5	£1.2	£12.1
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.2	£0.5	£0.7	£6.7
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.2	£12.3	£4.0	£14.4	£15.4	£5.8	£55.1
Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£4.0	£25.0	£29.9
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.9
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.7
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.5
Zone 3: Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.3	£2.0	£1.6	£8.6	£0.4	£0.5	£14.3
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.4	£7.2
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£3.0
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES	£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£46.6**	**£79.8**	**£85.7**	**£66.1**	**£39.8**	**£80.7**	**£398.6**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.5
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford	£1.0	£0.9	£0.3	£0.2	£2.1	£1.7	£6.1
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington	£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.8	£19.0	£26.2
Thamesmead (Morrisons)	£15.2	£0.6	£1.9	£0.3	£0.0	£0.0	£18.0
Thamesmead (Other)	£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores	£0.9	£0.1	£0.1	£0.6	£3.9	£6.5	£12.2
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£22.2**	**£6.2**	**£5.4**	**£2.0**	**£11.9**	**£36.8**	**£84.4**
TOTAL MARKET SHARE:	**£68.8**	**£85.9**	**£91.1**	**£68.0**	**£51.7**	**£117.5**	**£483.1**

Carter Jonas

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£69.8**	**£93.3**	**£92.2**	**£69.1**	**£53.0**	**£119.0**	**£496.4**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£14.9	£4.7	£0.0	£0.0	£0.0	£0.0	£19.7
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£8.4	£33.5	£0.6	£3.2	£1.9	£0.0	£47.8
Other	£0.6	£1.5	£0.0	£0.0	£0.2	£0.0	£2.3
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£10.5	£0.0	£0.0	£0.0	£0.0	£10.8
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.9	£0.1	£19.7	£1.9	£0.3	£3.0	£25.9
Tesco	£1.0	£0.6	£23.0	£1.3	£0.0	£3.5	£29.4
Tesco Express	£0.0	£0.3	£1.3	£0.2	£0.3	£1.5	£3.5
Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.6
Other	£0.0	£0.0	£3.7	£0.0	£0.0	£0.0	£3.7
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£5.1	£6.4	£14.9	£17.9	£6.6	£7.8	£58.8
Sainsbury's	£1.1	£1.9	£2.1	£6.7	£3.0	£2.4	£17.2
Marks & Spencer	£1.2	£2.7	£1.2	£3.6	£2.6	£1.3	£12.5
Other	£0.2	£0.5	£0.1	£0.7	£0.1	£0.3	£1.8
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.3	£0.6	£0.7	£6.8
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.3	£13.4	£4.0	£14.6	£15.8	£5.9	£56.9
Other	£0.0	£0.0	£0.0	£0.3	£1.5	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.7	£0.0	£2.3
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£4.1	£25.3	£30.4
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£4.4
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.3	£11.0
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£2.5	£1.3	£0.0	£0.0	£0.0	£0.0	£3.8
Zone 2: Erith	£0.0	£1.5	£0.0	£0.0	£0.2	£0.0	£1.7
Zone 3: Welling	£0.2	£0.6	£7.8	£0.9	£0.2	£0.0	£9.6
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.3	£2.2	£1.6	£8.7	£0.4	£0.5	£14.7
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.4	£7.3
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.8	£3.0
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4
ALL OTHER LOCAL STORES	£2.3	£4.1	£0.5	£1.3	£0.7	£5.0	£13.8
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£47.2**	**£86.6**	**£86.8**	**£67.1**	**£40.8**	**£81.8**	**£410.3**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.4	£0.1	£0.0	£0.0	£0.0	£0.0	£2.5
Bromley	£0.0	£0.4	£0.0	£0.0	£0.8	£0.3	£1.6
Charlton	£0.4	£0.7	£0.0	£0.0	£0.0	£0.1	£1.2
Dartford	£1.0	£1.0	£0.3	£0.2	£2.1	£1.7	£6.3
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£4.9	£5.3
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.6	£0.6	£0.5	£0.0	£0.0	£0.2	£1.9
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington	£0.0	£0.2	£0.0	£0.0	£0.3	£1.2	£1.7
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.9	£19.3	£26.6
Thamesmead (Morrisons)	£15.4	£0.6	£2.0	£0.3	£0.0	£0.0	£18.3
Thamesmead (Other)	£1.1	£0.9	£0.0	£0.2	£0.0	£0.0	£2.2
Woolwich	£0.5	£1.6	£0.2	£0.0	£0.0	£0.2	£2.5
All Other Stores	£0.9	£0.2	£0.1	£0.6	£4.0	£6.6	£12.4
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£22.5**	**£6.7**	**£5.5**	**£2.0**	**£12.2**	**£37.3**	**£86.2**
TOTAL MARKET SHARE:	**£69.8**	**£93.3**	**£92.2**	**£69.1**	**£53.0**	**£119.0**	**£496.4**

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
	TOTAL AVAILABLE FOOD SPEND (£M):	**£99.9**	**£105.6**	**£95.3**	**£72.6**	**£56.2**	**£122.4**	**£552.0**
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£2.6	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6
	Budgens	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£1.1
	Other	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£21.39	£5.37	£0.00	£0.00	£0.00	£0.0	£26.8
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£12.06	£37.98	£0.67	£3.36	£2.06	£0.04	£56.2
	Other	£0.88	£1.72	£0.00	£0.00	£0.19	£0.00	£2.8
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.44	£11.89	£0.00	£0.00	£0.00	£0.00	£12.3
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£1.22	£0.15	£20.35	£2.04	£0.28	£3.07	£27.1
	Tesco	£1.48	£0.65	£23.79	£1.34	£0.00	£3.62	£30.9
	Tesco Express	£0.00	£0.30	£1.38	£0.20	£0.29	£1.52	£3.7
	Lidl	£1.13	£0.00	£2.20	£0.08	£0.00	£0.62	£4.0
	Other	£0.00	£0.00	£3.80	£0.00	£0.00	£0.00	£3.8
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£7.31	£7.29	£15.42	£18.86	£7.04	£7.99	£63.9
	Sainsbury's	£1.54	£2.14	£2.19	£7.05	£3.13	£2.50	£18.6
	Marks & Spencer	£1.67	£3.10	£1.25	£3.75	£2.71	£1.30	£13.8
	Other	£0.25	£0.52	£0.08	£0.73	£0.08	£0.31	£2.0
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.31	£0.35	£1.90	£3.42	£0.59	£0.70	£7.3
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£4.69	£15.15	£4.14	£15.33	£16.70	£6.09	£62.1
	Other	£0.00	£0.00	£0.00	£0.27	£1.57	£0.00	£1.8
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.00	£0.00	£0.00	£0.64	£1.78	£0.00	£2.4
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.00	£0.13	£0.33	£0.62	£4.29	£26.04	£31.4
	Waitrose	£0.00	£0.00	£0.00	£0.00	£0.00	£4.51	£4.5
	Other	£0.00	£0.00	£0.13	£0.00	£0.00	£1.12	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.00	£0.00	£1.75	£0.00	£0.00	£9.58	£11.3
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.5
Zone 1:	Belvedere (incl Picardy Street)	£3.54	£1.49	£0.00	£0.00	£0.04	£0.00	£5.1
Zone 2:	Erith	£0.00	£1.71	£0.00	£0.00	£0.17	£0.00	£1.9
Zone 3:	Welling	£0.35	£0.62	£8.03	£0.92	£0.20	£0.00	£10.1
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£1.88	£2.46	£1.70	£9.17	£0.39	£0.49	£16.1
Zone 5:	Crayford & Old Bexley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.00	£0.00	£0.12	£0.00	£0.75	£6.63	£7.5
Zone 6:	Foots Cray (incl Lidl)	£0.00	£0.00	£0.00	£0.00	£0.23	£2.86	£3.1
Zone 6:	North Cray	£0.00	£0.00	£0.00	£1.43	£0.00	£0.00	£1.4
ALL OTHER LOCAL STORES		£3.25	£4.66	£0.47	£1.36	£0.72	£5.12	£15.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£67.6**	**£98.0**	**£89.7**	**£70.6**	**£43.2**	**£84.1**	**£453.2**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£3.41	£0.16	£0.00	£0.00	£0.00	£0.00	£3.6
Bromley		£0.06	£0.41	£0.00	£0.00	£0.89	£0.34	£1.7
Charlton		£0.55	£0.78	£0.00	£0.00	£0.00	£0.13	£1.5
Dartford		£1.43	£1.16	£0.27	£0.21	£2.23	£1.72	£7.0
Eltham		£0.18	£0.00	£0.27	£0.00	£0.00	£5.00	£5.5
Lakeside		£0.00	£0.00	£0.35	£0.00	£0.00	£0.04	£0.4
Bluewater		£0.80	£0.63	£0.51	£0.04	£0.04	£0.18	£2.2
Greenhithe		£0.08	£0.36	£0.00	£0.00	£0.00	£0.26	£0.7
Greenwich		£0.07	£0.16	£0.08	£0.04	£0.00	£2.59	£2.9
Orpington		£0.00	£0.18	£0.00	£0.00	£0.33	£1.24	£1.7
Tesco - off Edgington Way, nr Sidcup		£0.06	£0.00	£1.84	£0.60	£5.21	£19.81	£27.5
Thamesmead (Morrisons)		£22.08	£0.71	£2.04	£0.32	£0.00	£0.00	£25.1
Thamesmead (Other)		£1.56	£1.03	£0.00	£0.20	£0.00	£0.00	£2.8
Woolwich		£0.68	£1.85	£0.20	£0.00	£0.00	£0.26	£3.0
All Other Stores		£1.31	£0.18	£0.08	£0.67	£4.24	£6.79	£13.3
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£32.3**	**£7.6**	**£5.6**	**£2.1**	**£12.9**	**£38.3**	**£98.9**
	TOTAL MARKET SHARE:	**£99.9**	**£105.6**	**£95.3**	**£72.6**	**£56.2**	**£122.4**	**£552.0**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£130.3**	**£112.6**	**£97.8**	**£76.9**	**£58.3**	**£125.8**	**£601.6**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Budgens	£1.0	£0.4	£0.0	£0.0	£0.0	£0.0	£1.4
Other	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£27.89	£5.72	£0.00	£0.00	£0.00	£0.00	£33.6
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£15.73	£40.48	£0.68	£3.56	£2.14	£0.04	£62.6
Other	£1.14	£1.83	£0.00	£0.00	£0.19	£0.00	£3.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.58	£12.67	£0.00	£0.00	£0.00	£0.00	£13.3
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£1.6	£0.2	£20.9	£2.2	£0.3	£3.1	£28.2
Tesco	£1.9	£0.7	£24.4	£1.4	£0.0	£3.7	£32.2
Tesco Express	£0.0	£0.3	£1.4	£0.2	£0.3	£1.6	£3.8
Lidl	£1.5	£0.0	£2.3	£0.1	£0.0	£0.6	£4.5
Other	£0.0	£0.0	£3.9	£0.0	£0.0	£0.0	£3.9
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£9.5	£7.8	£15.8	£20.0	£7.3	£8.2	£68.6
Sainsbury's	£2.0	£2.3	£2.2	£7.5	£3.2	£2.6	£19.8
Marks & Spencer	£2.2	£3.3	£1.3	£4.0	£2.8	£1.3	£14.9
Other	£0.3	£0.6	£0.1	£0.8	£0.1	£0.3	£2.1
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.4	£0.4	£1.9	£3.6	£0.6	£0.7	£7.7
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£6.1	£16.1	£4.2	£16.2	£17.3	£6.3	£66.3
Other	£0.0	£0.0	£0.0	£0.3	£1.6	£0.0	£1.9
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.7	£1.9	£0.0	£2.5
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.7	£4.5	£26.7	£32.3
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£4.6
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.8	£0.0	£0.0	£9.8	£11.6
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Zone 1: Belvedere (incl Picardy Street)	£4.6	£1.6	£0.0	£0.0	£0.0	£0.0	£6.2
Zone 2: Erith	£0.0	£1.8	£0.0	£0.0	£0.2	£0.0	£2.0
Zone 3: Welling	£0.5	£0.7	£8.2	£1.0	£0.2	£0.0	£10.5
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£2.4	£2.6	£1.7	£9.7	£0.4	£0.5	£17.4
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.8	£6.8	£7.7
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.9	£3.2
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£1.5
ALL OTHER LOCAL STORES	£4.2	£5.0	£0.5	£1.4	£0.8	£5.3	£17.1
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£88.2**	**£104.5**	**£92.0**	**£74.7**	**£44.9**	**£86.4**	**£490.6**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£4.4	£0.2	£0.0	£0.0	£0.0	£0.0	£4.6
Bromley	£0.1	£0.4	£0.0	£0.0	£0.9	£0.4	£1.8
Charlton	£0.7	£0.8	£0.0	£0.0	£0.0	£0.1	£1.7
Dartford	£1.9	£1.2	£0.3	£0.2	£2.3	£1.8	£7.7
Eltham	£0.2	£0.0	£0.3	£0.0	£0.0	£5.1	£5.7
Lakeside	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater	£1.0	£0.7	£0.5	£0.0	£0.0	£0.2	£2.5
Greenhithe	£0.1	£0.4	£0.0	£0.0	£0.0	£0.3	£0.8
Greenwich	£0.1	£0.2	£0.1	£0.0	£0.0	£2.7	£3.1
Orpington	£0.0	£0.2	£0.0	£0.0	£0.3	£1.3	£1.8
Tesco - off Edgington Way, nr Sidcup	£0.1	£0.0	£1.9	£0.6	£5.4	£20.3	£28.3
Thamesmead (Morrisons)	£28.8	£0.8	£2.1	£0.3	£0.0	£0.0	£32.0
Thamesmead (Other)	£2.0	£1.1	£0.0	£0.2	£0.0	£0.0	£3.3
Woolwich	£0.9	£2.0	£0.2	£0.0	£0.0	£0.3	£3.3
All Other Stores	£1.7	£0.2	£0.1	£0.7	£4.4	£7.0	£14.1
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£42.1**	**£8.1**	**£5.8**	**£2.2**	**£13.4**	**£39.4**	**£111.0**
TOTAL MARKET SHARE:	**£130.3**	**£112.6**	**£97.8**	**£76.9**	**£58.3**	**£125.8**	**£601.6**

Carter Jonas

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£131.9**	**£114.8**	**£99.2**	**£79.4**	**£59.3**	**£127.9**	**£612.4**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Budgens	£1.0	£0.4	£0.0	£0.0	£0.0	£0.0	£1.4
Other	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£28.2	£5.8	£0.0	£0.0	£0.0	£0.0	£34.1
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£15.9	£41.3	£0.7	£3.7	£2.2	£0.0	£63.8
Other	£1.2	£1.9	£0.0	£0.0	£0.2	£0.0	£3.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.6	£12.9	£0.0	£0.0	£0.0	£0.0	£13.5
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£1.6	£0.2	£21.2	£2.2	£0.3	£3.2	£28.7
Tesco	£2.0	£0.7	£24.8	£1.5	£0.0	£3.8	£32.7
Tesco Express	£0.0	£0.3	£1.4	£0.2	£0.3	£1.6	£3.9
Lidl	£1.5	£0.0	£2.3	£0.1	£0.0	£0.6	£4.5
Other	£0.0	£0.0	£4.0	£0.0	£0.0	£0.0	£4.0
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£9.7	£7.9	£16.1	£20.6	£7.4	£8.3	£70.0
Sainsbury's	£2.0	£2.3	£2.3	£7.7	£3.3	£2.6	£20.3
Marks & Spencer	£2.2	£3.4	£1.3	£4.1	£2.9	£1.4	£15.2
Other	£0.3	£0.6	£0.1	£0.8	£0.1	£0.3	£2.2
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.4	£0.4	£2.0	£3.7	£0.6	£0.7	£7.8
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£6.2	£16.5	£4.3	£16.7	£17.6	£6.4	£67.7
Other	£0.0	£0.0	£0.0	£0.3	£1.7	£0.0	£1.9
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.7	£1.9	£0.0	£2.6
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.7	£4.5	£27.2	£32.9
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£4.7
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.2	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.8	£0.0	£0.0	£10.0	£11.8
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Zone 1: Belvedere (incl Picardy Street)	£4.7	£1.6	£0.0	£0.0	£0.0	£0.0	£6.3
Zone 2: Erith	£0.0	£1.9	£0.0	£0.0	£0.2	£0.0	£2.0
Zone 3: Welling	£0.5	£0.7	£8.4	£1.0	£0.2	£0.0	£10.7
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£2.5	£2.7	£1.8	£10.0	£0.4	£0.5	£17.9
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.8	£6.9	£7.8
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£3.0	£3.2
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£1.6
ALL OTHER LOCAL STORES	£4.3	£5.1	£0.5	£1.5	£0.8	£5.4	£17.4
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£89.3**	**£106.5**	**£93.4**	**£77.1**	**£45.6**	**£87.8**	**£499.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£4.5	£0.2	£0.0	£0.0	£0.0	£0.0	£4.7
Bromley	£0.1	£0.4	£0.0	£0.0	£0.9	£0.4	£1.8
Charlton	£0.7	£0.8	£0.0	£0.0	£0.0	£0.1	£1.7
Dartford	£1.9	£1.3	£0.3	£0.2	£2.4	£1.8	£7.8
Eltham	£0.2	£0.0	£0.3	£0.0	£0.0	£5.2	£5.7
Lakeside	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater	£1.1	£0.7	£0.5	£0.0	£0.0	£0.2	£2.5
Greenhithe	£0.1	£0.4	£0.0	£0.0	£0.0	£0.3	£0.8
Greenwich	£0.1	£0.2	£0.1	£0.0	£0.0	£2.7	£3.1
Orpington	£0.0	£0.2	£0.0	£0.0	£0.3	£1.3	£1.8
Tesco - off Edgington Way, nr Sidcup	£0.1	£0.0	£1.9	£0.7	£5.5	£20.7	£28.8
Thamesmead (Morrisons)	£29.1	£0.8	£2.1	£0.3	£0.0	£0.0	£32.4
Thamesmead (Other)	£2.1	£1.1	£0.0	£0.2	£0.0	£0.0	£3.4
Woolwich	£0.9	£2.0	£0.2	£0.0	£0.0	£0.3	£3.4
All Other Stores	£1.7	£0.2	£0.1	£0.7	£4.5	£7.1	£14.3
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£42.6**	**£8.3**	**£5.9**	**£2.3**	**£13.7**	**£40.0**	**£112.7**
TOTAL MARKET SHARE:	**£131.9**	**£114.8**	**£99.2**	**£79.4**	**£59.3**	**£127.9**	**£612.4**

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA ONLY (i.e. excluding 'inflow')

			TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY)					
			2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op	56-64 Nuxley Road		£1.8	£1.8	£1.8	£2.6	£3.4	£3.4
Budgens	72 Nuxley Road		£0.8	£0.8	£0.8	£1.1	£1.4	£1.4
Other			£0.2	£0.2	£0.2	£0.3	£0.4	£0.4
		Sub-total	**£2.8**	**£2.8**	**£2.9**	**£4.0**	**£5.2**	**£5.2**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road		**Sub-total**	**£18.9**	**£19.1**	**£19.7**	**£26.8**	**£33.6**	**£34.1**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons	James Watt Way		£44.7	£44.9	£47.8	£56.2	£62.6	£63.8
Other			£2.2	£2.2	£2.3	£2.8	£3.2	£3.2
		Sub-total	**£46.9**	**£47.1**	**£50.1**	**£58.9**	**£65.8**	**£67.0**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)		**Sub-total**	**£10.0**	**£10.0**	**£10.8**	**£12.3**	**£13.3**	**£13.5**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons	High Street		£25.5	£25.5	£25.9	£27.1	£28.2	£28.7
Tesco	Embassy Court		£29.0	£29.0	£29.4	£30.9	£32.2	£32.7
Tesco Express	124 Bellegrove Rd		£3.5	£3.5	£3.5	£3.7	£3.8	£3.9
Lidl	Upper Wickham Lane		£3.5	£3.6	£3.6	£4.0	£4.5	£4.5
Other			£3.6	£3.6	£3.7	£3.8	£3.9	£4.0
		Sub-total	**£65.1**	**£65.2**	**£66.1**	**£69.5**	**£72.6**	**£73.7**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda	160 Broadway, Graham Road		£57.2	£57.5	£58.8	£63.9	£68.6	£70.0
Sainsbury's	72 The Broadway		£16.7	£16.8	£17.2	£18.6	£19.8	£20.3
Marks & Spencer	55 The Broadway		£12.0	£12.1	£12.5	£13.8	£14.9	£15.2
Other			£1.7	£1.7	£1.8	£2.0	£2.1	£2.2
		Sub-total	**£87.7**	**£88.1**	**£90.3**	**£98.2**	**£105.5**	**£107.6**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)		**Sub-total**	**£6.7**	**£6.7**	**£6.8**	**£7.3**	**£7.7**	**£7.8**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's	Stadium Way		£54.6	£55.1	£56.9	£62.1	£66.3	£67.7
Other			£1.7	£1.7	£1.7	£1.8	£1.9	£1.9
		Sub-total	**£56.3**	**£56.8**	**£58.7**	**£63.9**	**£68.2**	**£69.6**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)		**Sub-total**	**£2.2**	**£2.2**	**£2.3**	**£2.4**	**£2.5**	**£2.6**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons	1 Jenner Close		£29.8	£29.9	£30.4	£31.4	£32.3	£32.9
Waitrose	High Street		£4.3	£4.3	£4.4	£4.5	£4.6	£4.7
Other			£1.2	£1.2	£1.2	£1.2	£1.3	£1.3
		Sub-total	**£35.3**	**£35.5**	**£36.0**	**£37.2**	**£38.2**	**£38.9**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)		**Sub-total**	**£10.8**	**£10.9**	**£11.0**	**£11.3**	**£11.6**	**£11.8**
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood		£0.4	£0.4	£0.4	£0.5	£0.7	£0.7
Zone 1:	Belvedere (incl Picardy Street)		£3.7	£3.7	£3.8	£5.1	£6.2	£6.3
Zone 2:	Erith		£1.5	£1.5	£1.7	£1.9	£2.0	£2.0
Zone 3:	Welling		£9.5	£9.5	£9.6	£10.1	£10.5	£10.7
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)		£14.3	£14.3	£14.7	£16.1	£17.4	£17.9
Zone 5:	Crayford & Old Bexley		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)		£7.1	£7.2	£7.3	£7.5	£7.7	£7.8
Zone 6:	Foots Cray (incl Lidl)		£2.9	£3.0	£3.0	£3.1	£3.2	£3.2
Zone 6:	North Cray		£1.3	£1.3	£1.4	£1.4	£1.5	£1.6
		Sub-total	**£40.7**	**£40.9**	**£41.8**	**£45.7**	**£49.3**	**£50.3**
ALL OTHER LOCAL STORES		**Sub-total**	**£13.3**	**£13.3**	**£13.8**	**£15.6**	**£17.1**	**£17.4**
BEXLEY BOROUGH - 'RETENTION' LEVEL (£m):			**£396.7**	**£398.6**	**£410.3**	**£453.2**	**£490.6**	**£499.7**

Notes: Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

		ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA	TOTAL TURNOVER 2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE								
Co-Op		5%	£1.9	£1.9	£1.9	£2.7	£3.6	£3.6
Budgens		5%	£0.8	£0.9	£0.9	£1.2	£1.4	£1.5
Other		2%	£0.2	£0.2	£0.2	£0.3	£0.4	£0.4
	Sub-total	5%	**£2.9**	**£3.0**	**£3.0**	**£4.2**	**£5.4**	**£5.5**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**Sub-total**	10.0%	**£21.0**	**£21.2**	**£21.9**	**£29.7**	**£37.3**	**£37.9**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE								
Morrisons		15%	£52.6	£52.9	£56.2	£66.1	£73.7	£75.0
Other		5%	£2.3	£2.3	£2.4	£2.9	£3.3	£3.4
	Sub-total	15%	**£54.9**	**£55.2**	**£58.7**	**£69.0**	**£77.0**	**£78.4**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**Sub-total**	2%	**£10.2**	**£10.2**	**£11.0**	**£12.6**	**£13.5**	**£13.8**
ZONE 3- WELLING MAJOR DISTRICT CENTRE								
Morrisons		25%	£34.0	£34.0	£34.5	£36.1	£37.6	£38.2
Tesco		25%	£38.7	£38.7	£39.2	£41.2	£42.9	£43.6
Lidl		10%	£3.9	£3.9	£4.0	£4.5	£5.0	£5.0
Other		5%	£7.5	£7.5	£7.6	£7.9	£8.1	£8.2
	Sub-total	23%	**£84.1**	**£84.2**	**£85.3**	**£89.7**	**£93.6**	**£95.1**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE								
Asda		25%	£76.3	£76.7	£78.4	£85.2	£91.5	£93.3
Sainsbury's		15%	£19.6	£19.7	£20.2	£21.8	£23.3	£23.8
Marks & Spencer		5%	£12.7	£12.8	£13.2	£14.5	£15.7	£16.0
Other		5%	£1.8	£1.8	£1.9	£2.1	£2.3	£2.3
	Sub-total	21%	**£110.4**	**£111.0**	**£113.7**	**£123.6**	**£132.7**	**£135.5**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**Sub-total**	5%	**£7.1**	**£7.1**	**£7.2**	**£7.6**	**£8.1**	**£8.3**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE								
Sainsbury's		25%	£72.9	£73.5	£75.9	£82.8	£88.4	£90.3
Other		15%	£2.0	£2.0	£2.0	£2.2	£2.2	£2.3
	Sub-total	25%	**£74.8**	**£75.4**	**£77.9**	**£84.9**	**£90.7**	**£92.6**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE								
Morrisons		40%	£49.6	£49.9	£50.7	£52.4	£53.9	£54.8
Waitrose		10%	£4.8	£4.8	£4.9	£5.0	£5.1	£5.2
Other		10%	£1.3	£1.3	£1.3	£1.4	£1.4	£1.4
	Sub-total	37%	**£55.8**	**£56.0**	**£56.9**	**£58.7**	**£60.5**	**£61.5**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**Sub-total**	10%	**£12.0**	**£12.1**	**£12.2**	**£12.6**	**£12.9**	**£13.1**
ALL NEIGHBOURHOOD CENTRES								
Zone 1: Abbey Wood		5%	£0.4	£0.4	£0.4	£0.6	£0.8	£0.8
Zone 1: Belvedere (incl Picardy Street)		5%	£3.8	£3.9	£4.0	£5.3	£6.6	£6.7
Zone 2: Erith		5%	£1.6	£1.6	£1.8	£2.0	£2.1	£2.1
Zone 3: Welling		5%	£10.0	£10.0	£10.1	£10.7	£11.1	£11.3
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)		5%	£15.1	£15.1	£15.5	£16.9	£18.4	£18.8
Zone 5: Crayford & Old Bexley		5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)		5%	£7.5	£7.5	£7.6	£7.9	£8.1	£8.2
Zone 6: Foots Cray (incl Lidl)		5%	£3.1	£3.1	£3.2	£3.3	£3.3	£3.4
Zone 6: North Cray		5%	£1.4	£1.4	£1.4	£1.5	£1.6	£1.6
	Sub-total		**£42.9**	**£43.0**	**£44.0**	**£48.1**	**£51.9**	**£53.0**
ALL OTHER LOCAL STORES	**Sub-total**	2%	**£13.5**	**£13.6**	**£14.1**	**£15.9**	**£17.5**	**£17.8**
BEXLEY BOROUGH - TOTAL TURNOVER:			**£489.6**	**£491.9**	**£505.9**	**£556.8**	**£601.2**	**£612.3**

Notes: The 'inflow' of expenditure to the Borough's shops and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Greenwich and Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB Bexley.

TABLE 15: NEW RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	In centre	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Neighbourhood Centre	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green:	Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre:	In Centre	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL:		**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**

TABLE 16a: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.5%	82.6%	82.1%	81.6%	81.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£396.7	£398.6	£410.3	£453.2	£490.6	£499.7
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£92.9	£93.3	£95.6	£103.6	£110.6	£112.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£489.6	£491.9	£505.9	£556.8	£601.2	£612.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£489.6	£487.6	£482.8	£485.2	£487.6	£490.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.3	£23.2	£71.6	£113.6	£122.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	All other	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£66.3**	**-£61.2**	**-£42.5**	**£5.6**	**£47.6**	**£55.9**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	-5,303	-4,915	-3,445	455	3,820	4,468
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-7,576	-7,021	-4,921	650	5,458	6,383

STEP 1: Total available expenditure derived from Table 3.

STEP 2: Retention level (%) for the study area at the base year (2015) derived from the revised market shares in Table 7a. Assume constant market shares over the forecast period.

STEP 3: Retention level (£m) over the forecast period derived from Tables 7b, 7-12, assuming constant market shares.

STEP 4 & 5 Estimated 'inflow' (% and £m) from outside the study area is derived from Table 14. The 'inflow' (trade draw) to the Borough's main stores and centres is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, as well as other published retail assessments in support of planning applications, healthchecks and other survey evidence. It takes into account a range of factors, including the likely impact of commuting patterns on available retail

STEP 6: Total forecast 'potential' turnover has been informed by the (survey-derived) revised market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5).

STEP 7: For the purpose of this assessment it has been assumed that the convenience goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified stores and floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the available evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new convenience goods floorspace, informed by Experian's latest growth forecasts and current research. For the purpose of this strategic assessment an annual average growth rate ranging from -0.4% to 0.1% has been assumed over the forecast period

STEP 8: The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7), assuming 'equilibrium' and constant market shares over the study period.

STEP 9: This step makes an allowance for all major convenience goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted) as set out in Table 15. It is assumed that all other commitments will be open and trading by 2018. In the case of Sainsbury's at Abbey Wood, although the store is actually located within the LB Greenwich it has been assumed that approximately 50% of its turnover will be drawn from within the LB Bexley area for the purpose of the retail capacity assessment. It has also been assumed that the new foodstore commitments will achieve 80% of their forecast 'benchmark' turnovers based on the significant new retail floorspace that will open in the next 5 years in the Borough and the increased level of competition and choice that will inevitably occur. It is noted that Tesco are no longer taking forward the planning permission for a superstore in Bexleyheath and it is uncertain whether the site will be delivered for retail.

STEP 10: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)).

STEP 11: The 'net' residual expenditure is converted into a net floorspace capacity estimate based on the assumed average sales performance of the main food/grocery retailer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and M&S) of approximately £12,500 per m^2. It is assumed for the purpose of this strategic assessment that other food supermarket retailers (e.g. Co-Op, Budgens, Iceland, etc.) and 'deep discount' food retailers (e.g. Aldi and Lidl) achieve average sales levels of approximately half that assumed for the 'top 6' food operators (i.e. circa £6,000 per sq m). However, the final capacity forecasts will vary depending on the individual operator, as some operators are achieving signficantly

TABLE 16b: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.5%	82.6%	82.1%	81.6%	81.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£396.7	£398.6	£410.3	£453.2	£490.6	£499.7
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	£0.2	£0.2	£0.2	£0.2	£0.2	£0.2
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£92.9	£93.3	£95.6	£103.6	£110.6	£112.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£489.6	£491.9	£505.9	£556.8	£601.2	£612.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£489.6	£487.6	£482.8	£485.2	£487.6	£490.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.3	£23.2	£71.6	£113.6	£122.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath - assume no development in study	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Imperial Gateway	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£32.2**	**£31.9**	**£31.9**	**£32.1**	**£32.1**	**£33.3**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£32.2**	**-£27.6**	**-£8.8**	**£39.5**	**£81.5**	**£89.0**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,580**	**-2,213**	**-711**	**3,189**	**6,544**	**7,111**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-3,685	-3,162	-1,015	4,556	9,348	10,159

TABLE 17: FOODSTORE & CONVENIENCE GOODS FLOORSPACE IN MAIN CENTRES & FORECAST 'BENCHMARK' TURNOVERS

			Estimated Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE										
	Co-Op	56-64 Nuxley Road	338	£7,700	£2.6	£2.6	£2.6	£2.6	£2.6	£2.6
	Budgens	72 Nuxley Road	291	£5,800	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
	TOTAL:		**628**	**£6,821**	**£4.3**	**£4.3**	**£4.2**	**£4.2**	**£4.3**	**£4.3**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE:										
	Morrisons	James Watt Way	3,223	£12,800	£41.3	£41.1	£40.7	£40.9	£41.1	£41.3
	Other		969	£5,000	£4.8	£4.8	£4.8	£4.8	£4.8	£4.8
	TOTAL:		**4,192**	**£10,997**	**£46.1**	**£45.9**	**£45.5**	**£45.7**	**£45.9**	**£46.1**
ZONE 3 -WELLING MAJOR DISTRICT CENTRE										
	Morrisons	High Street	2,969	£12,800	£38.0	£37.9	£37.5	£37.7	£37.9	£38.0
	Tesco	Embassy Court	2,813	£11,500	£32.3	£32.2	£31.9	£32.1	£32.2	£32.4
	Lidl	Upper Wickham Lane	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3	£3.3
	Other		1,746	£5,579	£9.7	£9.7	£9.6	£9.7	£9.7	£9.8
	TOTAL:		**8,378**	**£9,956**	**£83.4**	**£83.1**	**£82.2**	**£82.7**	**£83.1**	**£83.5**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE										
	Asda	160 Broadway, Graham Road	3,063	£13,400	£41.0	£40.9	£40.5	£40.7	£40.9	£41.1
	Sainsbury's	72 Broadway	1,464	£13,200	£19.3	£19.2	£19.1	£19.2	£19.2	£19.3
	Other		3,091	£7,536	£23.3	£23.2	£23.0	£23.1	£23.2	£23.3
	TOTAL:		**7,618**	**£10,982**	**£83.7**	**£83.3**	**£82.5**	**£82.9**	**£83.3**	**£83.7**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE										
	Sainsbury's	Stadium Way	5,574	£13,200	£73.6	£73.3	£72.6	£72.9	£73.3	£73.6
	Other		1,004	£5,795	£5.8	£5.8	£5.7	£5.8	£5.8	£5.8
	TOTAL:		**6,578**	**£12,070**	**£79.4**	**£79.1**	**£78.3**	**£78.7**	**£79.1**	**£79.5**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE										
	Morrisons	1 Jenner Close	1,840	£12,800	£23.6	£23.5	£23.2	£23.3	£23.5	£23.6
	Waitrose	High Street	531	£12,500	£6.6	£6.6	£6.5	£6.6	£6.6	£6.6
	Other		1,800	£6,596	£11.9	£11.8	£11.7	£11.8	£11.8	£11.9
	TOTAL:		**3,640**	**£11,555**	**£42.1**	**£41.9**	**£41.5**	**£41.7**	**£41.9**	**£42.1**
OTHER MAJOR SUPERMARKETS & CONVENIENCE STORES IN LB BEXLEY:										
Zone 1:	Former Tesco Express	21 Picardy Street, Belvedere	431	£6,000	£2.6	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 1:	Asda	Station Road, Belvedere	2,170	£13,400	£29.1	£29.0	£28.7	£28.8	£29.0	£29.1
Zone 2:	Co-Op	Bexley Road, Northumberland Heath	294	£7,700	£2.3	£2.3	£2.2	£2.2	£2.3	£2.3
Zone 4:	Co-Op	Falconwood Parade	275	£7,700	£2.1	£2.1	£2.1	£2.1	£2.1	£2.1
Zone 3:	Co-Op	301-303 Brampton Rd	175	£7,700	£1.3	£1.3	£1.3	£1.3	£1.3	£1.3
Zone 4:	Asda	13-15 Crook Log, Bexleyheath	523	£13,400	£7.0	£7.0	£6.9	£6.9	£7.0	£7.0
Zone 4:	Sainsbury's Local	81-87 Avenue Road, Bexleyheath	200	£13,200	£2.6	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 4:	Sainsbury's Local	287 Brampton Road	313	£13,200	£4.1	£4.1	£4.1	£4.1	£4.1	£4.1
Zone 4:	Co-Op	4-12 Pickford Lane, Bexleyheath	250	£7,700	£1.9	£1.9	£1.9	£1.9	£1.9	£1.9
Zone 4:	Co-Op	131-135 Long Lane	350	£7,700	£2.7	£2.7	£2.7	£2.7	£2.7	£2.7
Zone 4:	Sainsbury's Local	Erith Rd, Barnehurst	300	£13,200	£4.0	£3.9	£3.9	£3.9	£3.9	£4.0
Zone 6:	Tesco Express	Station Rd, Sidcup N/hood Centre	275	£11,500	£3.2	£3.1	£3.1	£3.1	£3.1	£3.2
Zone 6:	Lidl	Footscray High Street	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3	£3.3
Zone 6:	Co-Op	Westwood Lane, Blackfen	425	£7,700	£3.3	£3.3	£3.2	£3.2	£3.3	£3.3
	TOTAL:		**6,831**	**£10,174**	**£69.5**	**£69.2**	**£68.5**	**£68.9**	**£69.2**	**£69.6**

Notes: The convenience goods sales areas for stores have been derived from a variety of sources, including: the 2008 joint Greenwich & Bexley Retail Study and the retail assessments prepared in support of various planning applications for new foodstores in LB Bexley.

The base year 'benchmark' average sales densities for individual stores and operators have been informed by the latest published research and a wide range of retail studies. Assume a 'productivity' growth rate for existing floorspace ranging from -0.4% to +0.1% per annum over the forecast period.

Tesco have announced plans to close the Tesco Express Belvedere store (press release on 28th January 2015). Therefore, we have assumed that the existing store will be occupied by a supermarket (e.g. Co-operative) or Symbol retailer (e.g. Nisa, Londis, etc.)

TABLE 18: DIFFERENCE BETWEEN 'POTENTIAL' & 'BENCHMARK' TURNOVERS

			DIFFERENCE (£ million)					
			2015	**2016**	**2021**	**2026**	**2031**	**2036**
ZONE 1 - BELVEDERE DISTRICT CENTRE								
Co-Op	56-64 Nuxley Road		-£0.7	-£0.7	-£0.6	£0.2	£1.0	£1.0
Budgens	72 Nuxley Road		-£0.8	-£0.8	-£0.8	-£0.5	-£0.2	-£0.2
		Sub-total	**-£1.6**	**-£1.5**	**-£1.4**	**-£0.3**	**£0.8**	**£0.8**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE								
Asda	Station Road	**Sub-total**	**-£8.1**	**-£7.7**	**-£6.8**	**£0.9**	**£8.4**	**£8.7**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE								
Morrisons	James Watt Way		£11.4	£11.8	£15.5	£25.2	£32.6	£33.7
Other			-£2.6	-£2.5	-£2.3	-£1.9	-£1.5	-£1.5
		Sub-total	**£8.8**	**£9.2**	**£13.2**	**£23.3**	**£31.1**	**£32.3**
ZONE 3- WELLING MAJOR DISTRICT CENTRE								
Morrisons	High Street		-£4.0	-£3.8	-£3.0	-£1.5	-£0.2	£0.2
Tesco	Embassy Court		£6.3	£6.5	£7.3	£9.1	£10.7	£11.2
Lidl	Upper Wickham Lane		£0.6	£0.6	£0.7	£1.2	£1.6	£1.7
Other			-£2.3	-£2.2	-£2.0	-£1.8	-£1.6	-£1.5
		Sub-total	**£0.6**	**£1.1**	**£3.1**	**£7.0**	**£10.5**	**£11.6**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE								
Asda	160 Broadway, Graham Road		£35.3	£35.8	£38.0	£44.5	£50.6	£52.3
Sainsbury's	72 Broadway		£0.3	£0.5	£1.2	£2.7	£4.1	£4.5
Other			-£10.6	-£10.4	-£9.8	-£8.6	-£7.5	-£7.3
		Sub-total	**£25.0**	**£25.9**	**£29.3**	**£38.6**	**£47.1**	**£49.4**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)		**Sub-total**	**£0.0**	**£0.1**	**£0.3**	**£0.7**	**£1.1**	**£1.2**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE								
Sainsbury's			-£0.7	£0.2	£3.3	£9.9	£15.2	£16.6
Other			-£3.9	-£3.8	-£3.7	-£3.6	-£3.5	-£3.5
		Sub-total	**-£4.6**	**-£3.6**	**-£0.3**	**£6.3**	**£11.6**	**£13.1**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE								
Morrisons			£26.1	£26.4	£27.4	£29.0	£30.4	£31.2
Waitrose			-£1.8	-£1.8	-£1.7	-£1.6	-£1.5	-£1.4
Other			-£10.5	-£10.5	-£10.4	-£10.4	-£10.4	-£10.4
		Sub-total	**£13.7**	**£14.1**	**£15.4**	**£17.1**	**£18.6**	**£19.4**
TOTAL:			**£33.9**	**£37.5**	**£52.7**	**£93.5**	**£129.2**	**£136.5**

Notes: The difference in turnover levels identified by Table 14 and Table 17.

TABLE 19a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	19.6%	19.6%	19.6%	19.1%	18.8%	18.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£94.4	£94.9	£97.1	£105.5	£113.1	£115.5
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	20%	20%	20%	20%	20%	20%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.1	£23.2	£23.8	£25.8	£27.7	£28.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£117.5	£118.1	£120.9	£131.2	£140.8	£143.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£117.5	£117.0	£115.9	£116.4	£117.0	£117.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£5.0	£14.8	£23.8	£26.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£37.0**	**-£35.5**	**-£31.6**	**-£22.0**	**-£13.1**	**-£10.9**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,959**	**-2,850**	**-2,563**	**-1,775**	**-1,050**	**-872**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,227	-4,072	-3,661	-2,536	-1,500	-1,245

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 19b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO STORE COMMITMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	19.6%	19.6%	19.6%	19.1%	18.8%	18.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£94.4	£94.9	£97.1	£105.5	£113.1	£115.5
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19.7%	19.7%	19.7%	19.7%	19.7%	19.7%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.1	£23.2	£23.8	£25.8	£27.7	£28.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£117.5	£118.1	£120.9	£131.2	£140.8	£143.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£117.5	£117.0	£115.9	£116.4	£117.0	£117.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£5.0	£14.8	£23.8	£26.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£2.9**	**-£1.9**	**£2.1**	**£11.9**	**£20.8**	**£23.2**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-236**	**-149**	**171**	**959**	**1,673**	**1,852**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-337	-212	245	1,370	2,391	2,645

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 20: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	11.7%	11.8%	11.8%	11.6%	11.3%	11.4%
STEP 3:	**'RETENTION' LEVEL (£m):**	£56.31	£56.78	£58.66	£63.92	£68.24	£69.65
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.5	£18.7	£19.3	£21.0	£22.4	£22.9
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£74.8	£75.4	£77.9	£84.9	£90.7	£92.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£74.8	£74.5	£73.8	£74.1	£74.5	£74.9
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.9	£4.2	£10.8	£16.2	£17.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.9**	**£4.2**	**£10.8**	**£16.2**	**£17.7**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**75**	**338**	**872**	**1,299**	**1,412**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	107	483	1,246	1,856	2,017

TABLE 21: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£46.9	£47.1	£50.1	£58.9	£65.8	£67.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	15%	15%	15%	15%	15%	15%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£8.0	£8.0	£8.6	£10.1	£11.2	£11.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£54.9	£55.2	£58.7	£69.0	£77.0	£78.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£54.9	£54.7	£54.1	£54.4	£54.7	£55.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£4.5	£14.6	£22.3	£23.5
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£4.5**	**£14.6**	**£22.3**	**£23.5**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**38**	**367**	**1,178**	**1,794**	**1,876**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	54	524	1,683	2,563	2,680

TABLE 22: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	13.6%	13.5%	13.3%	12.6%	12.1%	12.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£65.13	£65.21	£66.11	£69.50	£72.56	£73.71
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	23%	23%	23%	22%	22%	22%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.9	£19.0	£19.2	£20.2	£21.0	£21.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£84.1	£84.2	£85.3	£89.7	£93.6	£95.1
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£84.1	£83.7	£82.9	£83.3	£83.7	£84.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.4	£2.4	£6.4	£9.9	£10.9
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.4**	**£2.4**	**£6.4**	**£9.9**	**£10.9**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**35**	**197**	**514**	**793**	**874**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	50	282	734	1,133	1,249

TABLE 23: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	7.3%	7.3%	7.3%	7.3%	7.3%	7.3%
STEP 3:	**'RETENTION' LEVEL (£m):**	£35.3	£35.5	£36.0	£37.2	£38.2	£38.9
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	37%	37%	37%	37%	37%	37%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£20.5	£20.6	£20.9	£21.6	£22.2	£22.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£55.8	£56.0	£56.9	£58.7	£60.5	£61.5
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£55.8	£55.5	£55.0	£55.3	£55.5	£55.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£1.9	£3.5	£4.9	£5.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£1.9**	**£3.5**	**£4.9**	**£5.7**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**39**	**153**	**281**	**395**	**454**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	56	219	402	565	648

TABLE 24: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£612.4
STEP 2:	**'RETENTION' LEVEL (%):**	5.4%	5.4%	5.4%	6.6%	7.6%	7.6%
STEP 3:	**'RETENTION' LEVEL (£m):**	£25.7	£26.0	£26.8	£36.4	£45.7	£46.4
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	9%	9%	9%	9%	9%	9%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£2.5	£2.5	£2.6	£3.5	£4.4	£4.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£28.2	£28.5	£29.3	£39.9	£50.1	£50.8
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£28.2	£28.0	£27.8	£27.9	£28.0	£28.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.4	£1.5	£12.0	£22.1	£22.6
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Sainsbury's (Cross Quarter, Abbey Wood):	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	- Imperial Gateway (Norman Park, Picardy Manorway):	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
	- Southmere Village, Tavy Bridge, Thamesmead	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£29.3**	**-£28.5**	**-£27.5**	**-£17.2**	**-£7.1**	**-£6.7**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**-2,344**	**-2,293**	**-2,228**	**-1,388**	**-572**	**-538**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-3,349	-3,275	-3,183	-1,982	-818	-769

TABLE 25: REST OF STUDY AREA: RESIDUAL FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£480.5	£483.1	£496.4	£552.0	£601.6	£0.3
STEP 2:	**'RETENTION' LEVEL FOR STUDY AREA (%):**	83%	83%	83%	82%	82%	82%
STEP 3:	**'RETENTION' LEVEL FOR STUDY AREA (£m):**	£73.0	£73.2	£75.5	£81.8	£86.9	£88.6
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	2%	2%	2%	2%	2%	2%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£1.4	£1.4	£1.4	£1.5	£1.6	£1.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£74.4	£74.6	£77.0	£83.3	£88.5	£90.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£74.4	£74.1	£73.4	£73.7	£74.1	£74.5
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£3.6	£9.6	£14.5	£15.8
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£3.6**	**£9.6**	**£14.5**	**£15.8**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**41**	**291**	**772**	**1,161**	**1,261**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	59	416	1,103	1,658	1,802

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Erith and Crittals

APPENDIX 4B: CONVENIENCE CAPACITY ASSESSMENT UPDATE - HIGHER POPULATION GROWTH SCENARIO

CONVENIENCE GOODS CAPACITY - SCENARIO PH4 (HIGHER POPULATION GROWTH)

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	37,130	37,580	49,895	69,338	75,706	74,889
ZONE 2	Erith	45,804	45,918	51,467	52,956	66,181	65,853
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,951	26,040	26,391	26,242
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350
STUDY AREA TOTAL:		**236,650**	**237,814**	**255,894**	**279,394**	**300,740**	**299,082**

Source: London Borough of Bexley (March 2015)
Notes: Scenario PH4 population projections are based on planned housing delivery by ward over the period 2011 to 2036.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£1,829	£1,830	£1,861	£1,905	£1,951	£1,995
ZONE 2	Erith	£1,888	£1,890	£1,921	£1,967	£2,014	£2,060
ZONE 3	Welling	£2,093	£2,095	£2,130	£2,180	£2,232	£2,283
ZONE 4	Bexleyheath	£2,122	£2,124	£2,159	£2,211	£2,263	£2,315
ZONE 5	Crayford/Old Bexley	£2,120	£2,122	£2,157	£2,208	£2,261	£2,312
ZONE 6	Sidcup	£2,157	£2,159	£2,195	£2,247	£2,301	£2,353

Source: Average spend per capita estimates for each zone are derived from Experian *'2013 - Retail Area Planner'* Reports (2013 prices).
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian Retail Planner Briefing Note 12.1 (October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£67.9	£68.8	£92.8	£132.1	£147.7	£149.4	94.5%	120.0%
ZONE 2	Erith	£86.5	£86.8	£98.9	£104.2	£133.3	£135.6	20.4%	56.8%
ZONE 3	Welling	£91.1	£91.1	£92.2	£95.3	£97.8	£99.2	4.6%	8.9%
ZONE 4	Bexleyheath	£67.9	£68.0	£69.1	£72.6	£76.9	£79.4	7.0%	16.9%
ZONE 5	Crayford/Old Bexley	£50.6	£51.7	£53.8	£57.5	£59.7	£60.7	13.7%	20.0%
ZONE 6	Sidcup	£117.2	£117.5	£119.0	£122.4	£125.8	£127.9	4.5%	9.1%
TOTAL		**£481.2**	**£483.9**	**£525.9**	**£584.2**	**£641.1**	**£652.2**	**21.4%**	**35.5%**

Source: Expenditure calculated from Tables 1 & 2.

TABLE 4: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

		ZONE 1 Belvedere %	ZONE 2 Erith %	ZONE 3 Welling %	ZONE 4 Bexleyheath %	ZONE 5 Crayford/ Old Bexley %	ZONE 6 Sidcup %	TOTAL %
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op		3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Budgens		1.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%
Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	**5.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons		17.4%	39.5%	0.7%	4.6%	3.7%	0.0%	10.5%
Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.4%
	SUB TOTAL:	**18.3%**	**41.1%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**10.9%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.0%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.4%
Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.1%
Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
	SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.8%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda		10.5%	8.4%	16.2%	26.4%	12.5%	6.7%	13.0%
Sainsbury's		1.5%	2.0%	2.3%	10.2%	5.6%	2.0%	3.6%
Marks & Spencer		1.7%	2.9%	1.3%	5.6%	4.8%	1.1%	2.6%
Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
	SUB TOTAL:	**14.0%**	**13.9%**	**19.9%**	**43.3%**	**23.1%**	**10.1%**	**19.6%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**5.2%**	**1.0%**	**0.6%**	**1.5%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's		6.8%	14.3%	4.3%	21.1%	29.7%	5.0%	11.8%
Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
	SUB TOTAL:	**6.8%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**12.1%**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	23.3%	6.6%
Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.2%
	SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**24.2%**	**6.8%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.2%**
NEIGHBOURHOOD CENTRES:								
Zone 1: Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1: Tesco Express, Picardy Street		4.6%	1.4%	0.0%	0.0%	0.1%	0.0%	0.9%
Zone 2: Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3: Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4: Bexleyheath		1.9%	2.3%	1.8%	10.7%	0.7%	0.4%	2.8%
Zone 5: Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6: Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	6.1%	1.6%
Zone 6: Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6: North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
	SUB TOTAL:	**7.4%**	**5.9%**	**10.3%**	**13.9%**	**3.2%**	**8.9%**	**8.6%**
ALL OTHER LOCAL STORES	**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.7%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**60.2%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**67.9%**	**81.7%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley		0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton		0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford		1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.2%
Eltham		0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside		0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater		0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe		0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich		0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington		0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup		0.1%	0.0%	1.9%	0.8%	9.3%	16.9%	5.5%
Thamesmead (Morrisons)		29.6%	0.7%	2.1%	0.4%	0.0%	0.0%	4.6%
Thamesmead (Other)		1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich		0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores		1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA		**39.8%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**32.1%**	**18.3%**
TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone.

TABLE 5: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (£m)

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE SPEND (£M):	£67.9	£86.5	£91.1	£67.9	£50.6	£117.2	£481.2
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Budgens	£1.3	£0.3	£0.0	£0.0	£0.0	£0.0	£1.5
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£11.8	£34.2	£0.6	£3.1	£1.9	£0.04	£51.7
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.7	£0.0	£0.0	£0.0	£0.0	£10.0
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£19.5	£1.9	£0.2	£2.9	£25.5
Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
Tesco Express	£0.0	£0.2	£1.3	£0.2	£0.3	£1.5	£3.5
Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.5
Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£7.2	£7.3	£14.7	£18.0	£6.3	£7.9	£61.3
Sainsbury's	£1.0	£1.8	£2.1	£6.9	£2.8	£2.4	£17.0
Marks & Spencer	£1.1	£2.5	£1.2	£3.8	£2.4	£1.2	£12.4
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.5	£0.5	£0.7	£7.0
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£4.6	£12.4	£4.0	£14.3	£15.0	£5.8	£56.2
Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£3.9	£27.3	£32.2
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.8
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£3.1	£1.2	£0.0	£0.0	£0.0	£0.0	£4.4
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3: Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4: Bexleyheath	£1.3	£2.0	£1.6	£7.3	£0.4	£0.5	£13.0
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£7.2	£8.0
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£2.9
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES	£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£40.9**	**£80.3**	**£85.7**	**£66.0**	**£38.9**	**£79.6**	**£391.4**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford	£1.0	£0.9	£0.3	£0.2	£2.0	£1.6	£6.0
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington	£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.7	£19.8	£26.9
Thamesmead (Morrisons)	£20.1	£0.6	£1.9	£0.3	£0.0	£0.0	£22.9
Thamesmead (Other)	£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores	£0.9	£0.1	£0.1	£0.6	£3.8	£6.5	£12.0
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£27.0**	**£6.2**	**£5.4**	**£1.9**	**£11.6**	**£37.6**	**£89.8**
TOTAL MARKET SHARE:	**£67.9**	**£86.5**	**£91.1**	**£67.9**	**£50.6**	**£117.2**	**£481.2**

Notes: Available expenditure in each zone has been allocated to all existing stores/floorspace based on the market share analysis (%) set out in Table 4.

TABLE 6: NEW CONVENIENCE RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	2015 Turnover	Estimated Trade Draw				
				Zone 1	Zone 2	Zone 4	Zone 6	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%	%	%
Asda , Station Road, Belevedere	2170	£13,400	£29.1	50%	15%			35%
Waitrose, High Street, Sidcup	531	£12,500	£6.6	0%	0%	0%	65%	35%
Sainsbury's Local, 287 Brampton Rd, near Bexleyheath	313	£13,200	£4.1	0%	0%	80%	0%	20%

Notes: Elsewhere equates to trade draw from outside of the Borough

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TABLE 7a: ALL CONVENIENCE GOODS SHOPPING - REVISED 2015 MARKET SHARE ANALYSIS (%)

		ZONE 1 Belvedere %	ZONE 2 Erith %	ZONE 3 Welling %	ZONE 4 Bexleyheath %	ZONE 5 Crayford/ Old Bexley %	ZONE 6 Sidcup %	TOTAL %
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op		2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Budgens		0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	**3.7%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**SUB TOTAL:**	**21.4%**	**5.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons		12.1%	36.0%	0.7%	4.6%	3.7%	0.0%	9.4%
Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.5%
	SUB TOTAL:	**13.0%**	**37.6%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**9.8%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.3%
Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.0%
Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
	SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.5%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda		7.3%	6.9%	16.2%	26.0%	12.5%	6.5%	11.9%
Sainsbury's		1.5%	2.0%	2.3%	9.7%	5.6%	2.0%	3.5%
Marks & Spencer		1.7%	2.9%	1.3%	5.2%	4.8%	1.1%	2.5%
Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
	SUB TOTAL:	**10.8%**	**12.4%**	**19.9%**	**41.8%**	**23.1%**	**9.9%**	**18.2%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**4.7%**	**1.0%**	**0.6%**	**1.4%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's		4.7%	14.3%	4.3%	21.1%	29.7%	5.0%	11.4%
Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
	SUB TOTAL:	**4.7%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**11.7%**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	21.3%	6.2%
Waitrose		0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.9%
Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.2%
	SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**25.9%**	**7.3%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.3%**
NEIGHBOURHOOD CENTRES:								
Zone 1: Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1: Tesco Express, Picardy Street (to close)		3.5%	1.4%	0.0%	0.0%	0.1%	0.0%	0.8%
Zone 2: Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3: Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4: Bexleyheath		1.9%	2.3%	1.8%	7.8%	0.7%	0.4%	2.3%
- including Sainsbury's 287 Local Brampton Road		0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.7%
Zone 5: Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6: Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	5.4%	1.5%
Zone 6: Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6: North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
	SUB TOTAL:	**6.3%**	**5.9%**	**10.3%**	**15.9%**	**3.2%**	**8.1%**	**8.5%**
ALL OTHER LOCAL STORES	**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.8%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**67.7%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**68.7%**	**82.6%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley		0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton		0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford		1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.3%
Eltham		0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside		0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater		0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe		0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich		0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington		0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup		0.1%	0.0%	1.9%	0.8%	9.3%	16.2%	5.4%
Thamesmead (Morrisons)		22.1%	0.7%	2.1%	0.4%	0.0%	0.0%	3.7%
Thamesmead (Other)		1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich		0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores		1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA		**32.3%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**31.3%**	**17.4%**
TOTAL MARKET SHARE:		**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone.

Carter Jonas

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
	TOTAL AVAILABLE FOOD SPEND (£M):	£67.9	£86.5	£91.1	£67.9	£50.6	£117.2	£481.2
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
	Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
	Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£14.54	£4.36	£0.00	£0.00	£0.00	£0.00	£18.9
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£8.2	£31.1	£0.6	£3.1	£1.9	£0.0	£45.0
	Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.3	£9.7	£0.0	£0.0	£0.0	£0.0	£10.0
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£0.8	£0.1	£19.5	£1.9	£0.2	£2.9	£25.5
	Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
	Tesco Express	£0.0	£0.2	£1.3	£0.2	£0.3	£1.5	£3.5
	Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.5
	Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£5.0	£6.0	£14.7	£17.6	£6.3	£7.6	£57.3
	Sainsbury's	£1.0	£1.8	£2.1	£6.6	£2.8	£2.4	£16.7
	Marks & Spencer	£1.1	£2.5	£1.2	£3.5	£2.4	£1.2	£12.1
	Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.2	£0.5	£0.7	£6.7
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£3.2	£12.4	£4.0	£14.3	£15.0	£5.8	£54.7
	Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.1	£0.3	£0.6	£3.9	£24.9	£29.8
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.8
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1:	Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.7
Zone 2:	Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3:	Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4:	Bexleyheath (including Sainsbury's Local Brampton Road)	£1.3	£2.0	£1.6	£8.6	£0.4	£0.5	£14.3
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.3	£7.1
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£2.9
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES		£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£46.0**	**£80.3**	**£85.7**	**£66.0**	**£38.9**	**£80.5**	**£397.3**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley		£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton		£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford		£1.0	£0.9	£0.3	£0.2	£2.0	£1.6	£6.0
Eltham		£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside		£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater		£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe		£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich		£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington		£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup		£0.0	£0.0	£1.8	£0.6	£4.7	£19.0	£26.0
Thamesmead (Morrisons)		£15.0	£0.6	£1.9	£0.3	£0.0	£0.0	£17.8
Thamesmead (Other)		£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich		£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores		£0.9	£0.1	£0.1	£0.6	£3.8	£6.5	£12.0
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£21.9**	**£6.2**	**£5.4**	**£1.9**	**£11.6**	**£36.7**	**£83.8**
	TOTAL MARKET SHARE:	**£67.9**	**£86.5**	**£91.1**	**£67.9**	**£50.6**	**£117.2**	**£481.2**

TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
	TOTAL AVAILABLE FOOD SPEND (£M):	£68.8	£86.8	£91.1	£68.0	£51.7	£117.5	£483.9
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
	Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
	Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£14.73	£4.4	£0.0	£0.0	£0.0	£0.0	£19.1
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£8.3	£31.2	£0.6	£3.1	£1.9	£0.0	£45.3
	Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.3	£9.8	£0.0	£0.0	£0.0	£0.0	£10.1
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£0.8	£0.1	£19.5	£1.9	£0.3	£2.9	£25.5
	Tesco	£1.0	£0.5	£22.7	£1.3	£0.0	£3.5	£29.0
	Tesco Express	£0.0	£0.3	£1.3	£0.2	£0.3	£1.5	£3.5
	Lidl	£0.8	£0.0	£2.1	£0.1	£0.0	£0.6	£3.6
	Other	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£5.0	£6.0	£14.7	£17.7	£6.5	£7.7	£57.6
	Sainsbury's	£1.1	£1.8	£2.1	£6.6	£2.9	£2.4	£16.8
	Marks & Spencer	£1.2	£2.5	£1.2	£3.5	£2.5	£1.2	£12.1
	Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.7
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.2	£0.3	£1.8	£3.2	£0.5	£0.7	£6.7
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£3.2	£12.4	£4.0	£14.4	£15.4	£5.8	£55.2
	Other	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.1	£0.3	£0.6	£4.0	£25.0	£29.9
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.2	£10.9
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1:	Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.7
Zone 2:	Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3:	Welling	£0.2	£0.5	£7.7	£0.9	£0.2	£0.0	£9.5
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£1.3	£2.0	£1.6	£8.6	£0.4	£0.5	£14.4
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.4	£7.2
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.7	£3.0
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3
ALL OTHER LOCAL STORES		£2.2	£3.8	£0.4	£1.3	£0.7	£4.9	£13.4
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£46.6**	**£80.5**	**£85.7**	**£66.1**	**£39.8**	**£80.7**	**£399.4**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.5
Bromley		£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton		£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford		£1.0	£1.0	£0.3	£0.2	£2.1	£1.7	£6.1
Eltham		£0.1	£0.0	£0.3	£0.0	£0.0	£4.8	£5.2
Lakeside		£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater		£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe		£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.6
Greenwich		£0.0	£0.1	£0.1	£0.0	£0.0	£2.5	£2.8
Orpington		£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.6
Tesco - off Edgington Way, nr Sidcup		£0.0	£0.0	£1.8	£0.6	£4.8	£19.0	£26.2
Thamesmead (Morrisons)		£15.2	£0.6	£1.9	£0.3	£0.0	£0.0	£18.0
Thamesmead (Other)		£1.1	£0.8	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich		£0.5	£1.5	£0.2	£0.0	£0.0	£0.2	£2.4
All Other Stores		£0.9	£0.1	£0.1	£0.6	£3.9	£6.5	£12.2
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£22.2**	**£6.2**	**£5.4**	**£2.0**	**£11.9**	**£36.8**	**£84.5**
	TOTAL MARKET SHARE:	**£68.8**	**£86.8**	**£91.1**	**£68.0**	**£51.7**	**£117.5**	**£483.9**

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
	TOTAL AVAILABLE FOOD SPEND (£M):	**£92.8**	**£98.9**	**£92.2**	**£69.1**	**£53.8**	**£119.0**	**£525.9**
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4
	Budgens	£0.7	£0.3	£0.0	£0.0	£0.0	£0.0	£1.0
	Other	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£19.9	£5.0	£0.0	£0.0	£0.0	£0.0	£24.9
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£11.2	£35.6	£0.6	£3.2	£2.0	£0.0	£52.7
	Other	£0.8	£1.6	£0.0	£0.0	£0.2	£0.0	£2.6
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.4	£11.1	£0.0	£0.0	£0.0	£0.0	£11.5
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£1.1	£0.1	£19.7	£1.9	£0.3	£3.0	£26.1
	Tesco	£1.4	£0.6	£23.0	£1.3	£0.0	£3.5	£29.8
	Tesco Express	£0.0	£0.3	£1.3	£0.2	£0.3	£1.5	£3.6
	Lidl	£1.1	£0.0	£2.1	£0.1	£0.0	£0.6	£3.9
	Other	£0.0	£0.0	£3.7	£0.0	£0.0	£0.0	£3.7
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£6.8	£6.8	£14.9	£17.9	£6.7	£7.8	£61.0
	Sainsbury's	£1.4	£2.0	£2.1	£6.7	£3.0	£2.4	£17.7
	Marks & Spencer	£1.6	£2.9	£1.2	£3.6	£2.6	£1.3	£13.1
	Other	£0.2	£0.5	£0.1	£0.7	£0.1	£0.3	£1.9
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.3	£0.3	£1.8	£3.3	£0.6	£0.7	£6.9
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£4.4	£14.2	£4.0	£14.6	£16.0	£5.9	£59.1
	Other	£0.0	£0.0	£0.0	£0.3	£1.5	£0.0	£1.8
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.7	£0.0	£2.3
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.1	£0.3	£0.6	£4.1	£25.3	£30.5
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£4.4
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.3	£11.0
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 1:	Belvedere (incl Picardy Street)	£3.3	£1.4	£0.0	£0.0	£0.0	£0.0	£4.7
Zone 2:	Erith	£0.0	£1.6	£0.0	£0.0	£0.2	£0.0	£1.8
Zone 3:	Welling	£0.3	£0.6	£7.8	£0.9	£0.2	£0.0	£9.7
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£1.7	£2.3	£1.6	£8.7	£0.4	£0.5	£15.3
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.4	£7.3
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.8	£3.0
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4
ALL OTHER LOCAL STORES		£3.0	£4.4	£0.5	£1.3	£0.7	£5.0	£14.8
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£62.9**	**£91.8**	**£86.8**	**£67.1**	**£41.4**	**£81.8**	**£431.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£3.2	£0.2	£0.0	£0.0	£0.0	£0.0	£3.3
Bromley		£0.1	£0.4	£0.0	£0.0	£0.8	£0.3	£1.6
Charlton		£0.5	£0.7	£0.0	£0.0	£0.0	£0.1	£1.4
Dartford		£1.3	£1.1	£0.3	£0.2	£2.1	£1.7	£6.7
Eltham		£0.2	£0.0	£0.3	£0.0	£0.0	£4.9	£5.3
Lakeside		£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater		£0.7	£0.6	£0.5	£0.0	£0.0	£0.2	£2.1
Greenhithe		£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.7
Greenwich		£0.1	£0.2	£0.1	£0.0	£0.0	£2.5	£2.9
Orpington		£0.0	£0.2	£0.0	£0.0	£0.3	£1.2	£1.7
Tesco - off Edgington Way, nr Sidcup		£0.1	£0.0	£1.8	£0.6	£5.0	£19.3	£26.7
Thamesmead (Morrisons)		£20.5	£0.7	£2.0	£0.3	£0.0	£0.0	£23.5
Thamesmead (Other)		£1.4	£1.0	£0.0	£0.2	£0.0	£0.0	£2.6
Woolwich		£0.6	£1.7	£0.2	£0.0	£0.0	£0.2	£2.8
All Other Stores		£1.2	£0.2	£0.1	£0.6	£4.1	£6.6	£12.8
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£30.0**	**£7.1**	**£5.5**	**£2.0**	**£12.4**	**£37.3**	**£94.2**
	TOTAL MARKET SHARE:	**£92.8**	**£98.9**	**£92.2**	**£69.1**	**£53.8**	**£119.0**	**£525.9**

Carter Jonas

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
	TOTAL AVAILABLE FOOD SPEND (£M):	£132.1	£104.2	£95.3	£72.6	£57.5	£122.4	£584.2
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
	Budgens	£1.0	£0.3	£0.0	£0.0	£0.0	£0.0	£1.4
	Other	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£28.28	£5.25	£0.00	£0.00	£0.00	£0.0	£33.5
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£15.95	£37.49	£0.67	£3.36	£2.11	£0.04	£59.6
	Other	£1.16	£1.69	£0.00	£0.00	£0.19	£0.00	£3.0
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.59	£11.73	£0.00	£0.00	£0.00	£0.00	£12.3
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£1.61	£0.14	£20.35	£2.04	£0.28	£3.07	£27.5
	Tesco	£1.96	£0.64	£23.79	£1.34	£0.00	£3.62	£31.4
	Tesco Express	£0.00	£0.30	£1.38	£0.20	£0.30	£1.52	£3.7
	Lidl	£1.50	£0.00	£2.20	£0.08	£0.00	£0.62	£4.4
	Other	£0.00	£0.00	£3.80	£0.00	£0.00	£0.00	£3.8
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£9.67	£7.20	£15.42	£18.86	£7.21	£7.99	£66.3
	Sainsbury's	£2.03	£2.11	£2.19	£7.05	£3.20	£2.50	£19.1
	Marks & Spencer	£2.21	£3.06	£1.25	£3.75	£2.77	£1.30	£14.3
	Other	£0.33	£0.51	£0.08	£0.73	£0.08	£0.31	£2.0
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.40	£0.34	£1.90	£3.42	£0.60	£0.70	£7.4
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£6.20	£14.94	£4.14	£15.33	£17.10	£6.09	£63.8
	Other	£0.00	£0.00	£0.00	£0.27	£1.61	£0.00	£1.9
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.00	£0.00	£0.00	£0.64	£1.83	£0.00	£2.5
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.00	£0.13	£0.33	£0.62	£4.40	£26.04	£31.5
	Waitrose	£0.00	£0.00	£0.00	£0.00	£0.00	£4.51	£4.5
	Other	£0.00	£0.00	£0.13	£0.00	£0.00	£1.12	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.00	£0.00	£1.75	£0.00	£0.00	£9.58	£11.3
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.7
Zone 1:	Belvedere (incl Picardy Street)	£4.68	£1.47	£0.00	£0.00	£0.04	£0.00	£6.2
Zone 2:	Erith	£0.00	£1.69	£0.00	£0.00	£0.17	£0.00	£1.9
Zone 3:	Welling	£0.47	£0.62	£8.03	£0.92	£0.20	£0.00	£10.2
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£2.48	£2.43	£1.70	£9.17	£0.40	£0.49	£16.7
Zone 5:	Crayford & Old Bexley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.00	£0.00	£0.12	£0.00	£0.77	£6.63	£7.5
Zone 6:	Foots Cray (incl Lidl)	£0.00	£0.00	£0.00	£0.00	£0.24	£2.86	£3.1
Zone 6:	North Cray	£0.00	£0.00	£0.00	£1.43	£0.00	£0.00	£1.4
ALL OTHER LOCAL STORES		£4.30	£4.60	£0.47	£1.36	£0.74	£5.12	£16.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£89.4**	**£96.7**	**£89.7**	**£70.6**	**£44.3**	**£84.1**	**£474.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£4.51	£0.16	£0.00	£0.00	£0.00	£0.00	£4.7
Bromley		£0.08	£0.40	£0.00	£0.00	£0.91	£0.34	£1.7
Charlton		£0.72	£0.77	£0.00	£0.00	£0.00	£0.13	£1.6
Dartford		£1.89	£1.14	£0.27	£0.21	£2.29	£1.72	£7.5
Eltham		£0.24	£0.00	£0.27	£0.00	£0.00	£5.00	£5.5
Lakeside		£0.00	£0.00	£0.35	£0.00	£0.00	£0.04	£0.4
Bluewater		£1.05	£0.62	£0.51	£0.04	£0.04	£0.18	£2.4
Greenhithe		£0.10	£0.36	£0.00	£0.00	£0.00	£0.26	£0.7
Greenwich		£0.09	£0.16	£0.08	£0.04	£0.00	£2.59	£3.0
Orpington		£0.00	£0.18	£0.00	£0.00	£0.34	£1.24	£1.8
Tesco - off Edgington Way, nr Sidcup		£0.08	£0.00	£1.84	£0.60	£5.33	£19.81	£27.7
Thamesmead (Morrisons)		£29.20	£0.70	£2.04	£0.32	£0.00	£0.00	£32.3
Thamesmead (Other)		£2.06	£1.01	£0.00	£0.20	£0.00	£0.00	£3.3
Woolwich		£0.90	£1.82	£0.20	£0.00	£0.00	£0.26	£3.2
All Other Stores		£1.74	£0.18	£0.08	£0.67	£4.34	£6.79	£13.8
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£42.7**	**£7.5**	**£5.6**	**£2.1**	**£13.2**	**£38.3**	**£109.5**
	TOTAL MARKET SHARE:	**£132.1**	**£104.2**	**£95.3**	**£72.6**	**£57.5**	**£122.4**	**£584.2**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
	TOTAL AVAILABLE FOOD SPEND (£M):	**£147.7**	**£133.3**	**£97.8**	**£76.9**	**£59.7**	**£125.8**	**£641.1**
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£3.9	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9
	Budgens	£1.1	£0.4	£0.0	£0.0	£0.0	£0.0	£1.6
	Other	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£31.62	£6.72	£0.00	£0.00	£0.00	£0.00	£38.3
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£17.83	£47.97	£0.68	£3.56	£2.19	£0.04	£72.3
	Other	£1.30	£2.17	£0.00	£0.00	£0.20	£0.00	£3.7
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.66	£15.00	£0.00	£0.00	£0.00	£0.00	£15.7
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£1.8	£0.2	£20.9	£2.2	£0.3	£3.1	£28.5
	Tesco	£2.2	£0.8	£24.4	£1.4	£0.0	£3.7	£32.6
	Tesco Express	£0.0	£0.4	£1.4	£0.2	£0.3	£1.6	£3.9
	Lidl	£1.7	£0.0	£2.3	£0.1	£0.0	£0.6	£4.7
	Other	£0.0	£0.0	£3.9	£0.0	£0.0	£0.0	£3.9
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£10.8	£9.2	£15.8	£20.0	£7.5	£8.2	£71.5
	Sainsbury's	£2.3	£2.7	£2.2	£7.5	£3.3	£2.6	£20.6
	Marks & Spencer	£2.5	£3.9	£1.3	£4.0	£2.9	£1.3	£15.9
	Other	£0.4	£0.7	£0.1	£0.8	£0.1	£0.3	£2.3
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.5	£0.4	£1.9	£3.6	£0.6	£0.7	£7.8
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£6.9	£19.1	£4.2	£16.2	£17.7	£6.3	£70.5
	Other	£0.0	£0.0	£0.0	£0.3	£1.7	£0.0	£1.9
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.7	£1.9	£0.0	£2.6
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.2	£0.3	£0.7	£4.6	£26.7	£32.5
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6	£4.6
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.8	£0.0	£0.0	£9.8	£11.6
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Zone 1:	Belvedere (incl Picardy Street)	£5.2	£1.9	£0.0	£0.0	£0.0	£0.0	£7.2
Zone 2:	Erith	£0.0	£2.2	£0.0	£0.0	£0.2	£0.0	£2.3
Zone 3:	Welling	£0.5	£0.8	£8.2	£1.0	£0.2	£0.0	£10.7
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£2.8	£3.1	£1.7	£9.7	£0.4	£0.5	£18.3
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.8	£6.8	£7.7
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.9	£3.2
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£1.5
ALL OTHER LOCAL STORES		£4.8	£5.9	£0.5	£1.4	£0.8	£5.3	£18.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£100.0**	**£123.7**	**£92.0**	**£74.7**	**£45.9**	**£86.4**	**£522.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£5.0	£0.2	£0.0	£0.0	£0.0	£0.0	£5.2
Bromley		£0.1	£0.5	£0.0	£0.0	£0.9	£0.4	£1.9
Charlton		£0.8	£1.0	£0.0	£0.0	£0.0	£0.1	£1.9
Dartford		£2.1	£1.5	£0.3	£0.2	£2.4	£1.8	£8.2
Eltham		£0.3	£0.0	£0.3	£0.0	£0.0	£5.1	£5.7
Lakeside		£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater		£1.2	£0.8	£0.5	£0.0	£0.0	£0.2	£2.8
Greenhithe		£0.1	£0.5	£0.0	£0.0	£0.0	£0.3	£0.8
Greenwich		£0.1	£0.2	£0.1	£0.0	£0.0	£2.7	£3.1
Orpington		£0.0	£0.2	£0.0	£0.0	£0.4	£1.3	£1.8
Tesco - off Edgington Way, nr Sidcup		£0.1	£0.0	£1.9	£0.6	£5.5	£20.3	£28.5
Thamesmead (Morrisons)		£32.6	£0.9	£2.1	£0.3	£0.0	£0.0	£36.0
Thamesmead (Other)		£2.3	£1.3	£0.0	£0.2	£0.0	£0.0	£3.8
Woolwich		£1.0	£2.3	£0.2	£0.0	£0.0	£0.3	£3.8
All Other Stores		£1.9	£0.2	£0.1	£0.7	£4.5	£7.0	£14.4
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£47.7**	**£9.6**	**£5.8**	**£2.2**	**£13.7**	**£39.4**	**£118.4**
	TOTAL MARKET SHARE:	**£147.7**	**£133.3**	**£97.8**	**£76.9**	**£59.7**	**£125.8**	**£641.1**

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£149.4**	**£135.6**	**£99.2**	**£79.4**	**£60.7**	**£127.9**	**£652.2**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£3.9	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9
Budgens	£1.2	£0.4	£0.0	£0.0	£0.0	£0.0	£1.6
Other	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£32.0	£6.8	£0.0	£0.0	£0.0	£0.0	£38.8
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£18.0	£48.8	£0.7	£3.7	£2.2	£0.0	£73.5
Other	£1.3	£2.2	£0.0	£0.0	£0.2	£0.0	£3.7
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.7	£15.3	£0.0	£0.0	£0.0	£0.0	£15.9
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£1.8	£0.2	£21.2	£2.2	£0.3	£3.2	£28.9
Tesco	£2.2	£0.8	£24.8	£1.5	£0.0	£3.8	£33.1
Tesco Express	£0.0	£0.4	£1.4	£0.2	£0.3	£1.6	£4.0
Lidl	£1.7	£0.0	£2.3	£0.1	£0.0	£0.6	£4.7
Other	£0.0	£0.0	£4.0	£0.0	£0.0	£0.0	£4.0
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£10.9	£9.4	£16.1	£20.6	£7.6	£8.3	£72.9
Sainsbury's	£2.3	£2.7	£2.3	£7.7	£3.4	£2.6	£21.0
Marks & Spencer	£2.5	£4.0	£1.3	£4.1	£2.9	£1.4	£16.2
Other	£0.4	£0.7	£0.1	£0.8	£0.1	£0.3	£2.3
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.5	£0.4	£2.0	£3.7	£0.6	£0.7	£8.0
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£7.0	£19.5	£4.3	£16.7	£18.0	£6.4	£71.9
Other	£0.0	£0.0	£0.0	£0.3	£1.7	£0.0	£2.0
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.7	£1.9	£0.0	£2.6
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.2	£0.3	£0.7	£4.6	£27.2	£33.0
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£4.7
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.2	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.8	£0.0	£0.0	£10.0	£11.8
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Zone 1: Belvedere (incl Picardy Street)	£5.3	£1.9	£0.0	£0.0	£0.0	£0.0	£7.3
Zone 2: Erith	£0.0	£2.2	£0.0	£0.0	£0.2	£0.0	£2.4
Zone 3: Welling	£0.5	£0.8	£8.4	£1.0	£0.2	£0.0	£10.9
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£2.8	£3.2	£1.8	£10.0	£0.4	£0.5	£18.7
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.8	£6.9	£7.9
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£3.0	£3.2
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£1.6
ALL OTHER LOCAL STORES	£4.9	£6.0	£0.5	£1.5	£0.8	£5.4	£18.9
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£101.1**	**£125.9**	**£93.4**	**£77.1**	**£46.7**	**£87.8**	**£532.0**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£5.1	£0.2	£0.0	£0.0	£0.0	£0.0	£5.3
Bromley	£0.1	£0.5	£0.0	£0.0	£1.0	£0.4	£1.9
Charlton	£0.8	£1.0	£0.0	£0.0	£0.0	£0.1	£2.0
Dartford	£2.1	£1.5	£0.3	£0.2	£2.4	£1.8	£8.4
Eltham	£0.3	£0.0	£0.3	£0.0	£0.0	£5.2	£5.8
Lakeside	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater	£1.2	£0.8	£0.5	£0.0	£0.0	£0.2	£2.8
Greenhithe	£0.1	£0.5	£0.0	£0.0	£0.0	£0.3	£0.8
Greenwich	£0.1	£0.2	£0.1	£0.0	£0.0	£2.7	£3.2
Orpington	£0.0	£0.2	£0.0	£0.0	£0.4	£1.3	£1.9
Tesco - off Edgington Way, nr Sidcup	£0.1	£0.0	£1.9	£0.7	£5.6	£20.7	£29.0
Thamesmead (Morrisons)	£33.0	£0.9	£2.1	£0.3	£0.0	£0.0	£36.4
Thamesmead (Other)	£2.3	£1.3	£0.0	£0.2	£0.0	£0.0	£3.9
Woolwich	£1.0	£2.4	£0.2	£0.0	£0.0	£0.3	£3.9
All Other Stores	£2.0	£0.2	£0.1	£0.7	£4.6	£7.1	£14.7
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£48.3**	**£9.8**	**£5.9**	**£2.3**	**£14.0**	**£40.0**	**£120.2**
TOTAL MARKET SHARE:	**£149.4**	**£135.6**	**£99.2**	**£79.4**	**£60.7**	**£127.9**	**£652.2**

			£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA ONLY (i.e. excluding 'inflow')

				TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY)					
				2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE: DISTRICT CENTRE									
	Co-Op	56-64 Nuxley Road		£1.8	£1.8	£2.4	£3.4	£3.9	£3.9
	Budgens	72 Nuxley Road		£0.8	£0.8	£1.0	£1.4	£1.6	£1.6
	Other			£0.2	£0.2	£0.3	£0.4	£0.5	£0.5
			Sub-total	**£2.8**	**£2.8**	**£3.7**	**£5.2**	**£5.9**	**£6.0**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:									
	Asda, Station Road		**Sub-total**	**£18.9**	**£19.1**	**£24.9**	**£33.5**	**£38.3**	**£38.8**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE									
	Morrisons	James Watt Way		£45.0	£45.3	£52.7	£59.6	£72.3	£73.5
	Other			£2.2	£2.2	£2.6	£3.0	£3.7	£3.7
			Sub-total	**£47.2**	**£47.4**	**£55.3**	**£62.7**	**£75.9**	**£77.2**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE									
	All Shops (incl Tesco & Co-Op)		**Sub-total**	**£10.0**	**£10.1**	**£11.5**	**£12.3**	**£15.7**	**£15.9**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE									
	Morrisons	High Street		£25.5	£25.5	£26.1	£27.5	£28.5	£28.9
	Tesco	Embassy Court		£29.0	£29.0	£29.8	£31.4	£32.6	£33.1
	Tesco Express	124 Bellegrove Rd		£3.5	£3.5	£3.6	£3.7	£3.9	£4.0
	Lidl	Upper Wickham Lane		£3.5	£3.6	£3.9	£4.4	£4.7	£4.7
	Other			£3.6	£3.6	£3.7	£3.8	£3.9	£4.0
			Sub-total	**£65.1**	**£65.2**	**£67.1**	**£70.7**	**£73.5**	**£74.6**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE									
	Asda	160 Broadway, Graham Road		£57.3	£57.6	£61.0	£66.3	£71.5	£72.9
	Sainsbury's	72 The Broadway		£16.7	£16.8	£17.7	£19.1	£20.6	£21.0
	Marks & Spencer	55 The Broadway		£12.1	£12.1	£13.1	£14.3	£15.9	£16.2
	Other			£1.7	£1.7	£1.9	£2.0	£2.3	£2.3
			Sub-total	**£87.8**	**£88.3**	**£93.7**	**£101.8**	**£110.2**	**£112.4**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:									
	Asda, Crook Log (former Netto)		**Sub-total**	**£6.7**	**£6.7**	**£6.9**	**£7.4**	**£7.8**	**£8.0**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE									
	Sainsbury's	Stadium Way		£54.7	£55.2	£59.1	£63.8	£70.5	£71.9
	Other			£1.7	£1.7	£1.8	£1.9	£1.9	£2.0
			Sub-total	**£56.4**	**£56.9**	**£60.8**	**£65.7**	**£72.5**	**£73.9**
ZONE 5 - BEXLEY: DISTRICT CENTRE									
	All Shops (incl Costcutter)		**Sub-total**	**£2.2**	**£2.2**	**£2.3**	**£2.5**	**£2.6**	**£2.6**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE									
	Morrisons	1 Jenner Close		£29.8	£29.9	£30.5	£31.5	£32.5	£33.0
	Waitrose	High Street		£4.3	£4.3	£4.4	£4.5	£4.6	£4.7
	Other			£1.2	£1.2	£1.2	£1.2	£1.3	£1.3
			Sub-total	**£35.3**	**£35.5**	**£36.1**	**£37.3**	**£38.4**	**£39.0**
ZONE 6 - BLACKFEN: DISTRICT CENTRE									
	All Shops (incl Tesco Express)		**Sub-total**	**£10.8**	**£10.9**	**£11.0**	**£11.3**	**£11.6**	**£11.8**
NEIGHBOURHOOD CENTRES:									
Zone 1:	Abbey Wood			£0.4	£0.4	£0.5	£0.7	£0.8	£0.8
Zone 1:	Belvedere (incl Picardy Street)			£3.7	£3.7	£4.7	£6.2	£7.2	£7.3
Zone 2:	Erith			£1.6	£1.6	£1.8	£1.9	£2.3	£2.4
Zone 3:	Welling			£9.5	£9.5	£9.7	£10.2	£10.7	£10.9
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)			£14.3	£14.4	£15.3	£16.7	£18.3	£18.7
Zone 5:	Crayford & Old Bexley			£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)			£7.1	£7.2	£7.3	£7.5	£7.7	£7.9
Zone 6:	Foots Cray (incl Lidl)			£2.9	£3.0	£3.0	£3.1	£3.2	£3.2
Zone 6:	North Cray			£1.3	£1.3	£1.4	£1.4	£1.5	£1.6
			Sub-total	**£40.8**	**£40.9**	**£43.7**	**£47.7**	**£51.7**	**£52.7**
ALL OTHER LOCAL STORES			**Sub-total**	**£13.3**	**£13.4**	**£14.8**	**£16.6**	**£18.6**	**£18.9**
BEXLEY BOROUGH - 'RETENTION' LEVEL (£m):				**£397.3**	**£399.4**	**£431.7**	**£474.7**	**£522.7**	**£532.0**

Notes: Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

		ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA	TOTAL TURNOVER 2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE								
Co-Op		5%	£1.9	£1.9	£2.6	£3.6	£4.1	£4.1
Budgens		5%	£0.8	£0.9	£1.1	£1.4	£1.7	£1.7
Other		2%	£0.2	£0.2	£0.3	£0.4	£0.5	£0.5
	Sub-total	5%	**£2.9**	**£3.0**	**£3.9**	**£5.5**	**£6.2**	**£6.2**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**Sub-total**	10.0%	**£21.0**	**£21.2**	**£27.6**	**£37.3**	**£42.6**	**£43.1**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE								
Morrisons		15%	£52.9	£53.2	£61.9	£70.1	£85.0	£86.5
Other		5%	£2.3	£2.3	£2.7	£3.2	£3.9	£3.9
	Sub-total	15%	**£55.2**	**£55.5**	**£64.7**	**£73.3**	**£88.9**	**£90.4**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**Sub-total**	2%	**£10.2**	**£10.3**	**£11.8**	**£12.6**	**£16.0**	**£16.3**
ZONE 3- WELLING MAJOR DISTRICT CENTRE								
Morrisons		25%	£34.0	£34.0	£34.9	£36.7	£38.0	£38.6
Tesco		25%	£38.7	£38.7	£39.7	£41.8	£43.4	£44.1
Lidl		10%	£3.9	£3.9	£4.3	£4.9	£5.2	£5.2
Other		5%	£7.5	£7.5	£7.6	£7.9	£8.2	£8.3
	Sub-total	23%	**£84.1**	**£84.2**	**£86.5**	**£91.2**	**£94.7**	**£96.2**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE								
Asda		25%	£76.4	£76.8	£81.3	£88.5	£95.3	£97.2
Sainsbury's		15%	£19.6	£19.8	£20.8	£22.5	£24.2	£24.7
Marks & Spencer		5%	£12.7	£12.8	£13.8	£15.1	£16.7	£17.0
Other		5%	£1.8	£1.8	£2.0	£2.2	£2.4	£2.5
	Sub-total	21%	**£110.6**	**£111.1**	**£117.9**	**£128.2**	**£138.6**	**£141.4**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**Sub-total**	5%	**£7.1**	**£7.1**	**£7.3**	**£7.8**	**£8.2**	**£8.4**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE								
Sainsbury's		25%	£73.0	£73.6	£78.7	£85.1	£94.0	£95.9
Other		15%	£2.0	£2.0	£2.1	£2.2	£2.3	£2.3
	Sub-total	25%	**£74.9**	**£75.6**	**£80.8**	**£87.3**	**£96.3**	**£98.2**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE								
Morrisons		40%	£49.6	£49.9	£50.8	£52.5	£54.1	£55.0
Waitrose		10%	£4.8	£4.8	£4.9	£5.0	£5.1	£5.2
Other		10%	£1.3	£1.3	£1.3	£1.4	£1.4	£1.4
	Sub-total	37%	**£55.8**	**£56.0**	**£57.0**	**£58.9**	**£60.7**	**£61.7**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**Sub-total**	10%	**£12.0**	**£12.1**	**£12.2**	**£12.6**	**£12.9**	**£13.1**
ALL NEIGHBOURHOOD CENTRES								
Zone 1: Abbey Wood		5%	£0.4	£0.4	£0.5	£0.8	£0.9	£0.9
Zone 1: Belvedere (incl Picardy Street)		5%	£3.9	£3.9	£5.0	£6.5	£7.5	£7.6
Zone 2: Erith		5%	£1.6	£1.6	£1.9	£2.0	£2.5	£2.5
Zone 3: Welling		5%	£10.0	£10.0	£10.3	£10.8	£11.3	£11.5
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)		5%	£15.1	£15.1	£16.1	£17.6	£19.2	£19.7
Zone 5: Crayford & Old Bexley		5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)		5%	£7.5	£7.5	£7.7	£7.9	£8.1	£8.3
Zone 6: Foots Cray (incl Lidl)		5%	£3.1	£3.1	£3.2	£3.3	£3.4	£3.4
Zone 6: North Cray		5%	£1.4	£1.4	£1.4	£1.5	£1.6	£1.6
	Sub-total		**£42.9**	**£43.1**	**£46.0**	**£50.2**	**£54.4**	**£55.5**
ALL OTHER LOCAL STORES	**Sub-total**	2%	**£13.6**	**£13.6**	**£15.1**	**£16.9**	**£19.0**	**£19.3**
BEXLEY BOROUGH - TOTAL TURNOVER:			**£490.3**	**£492.8**	**£530.8**	**£581.7**	**£638.6**	**£650.0**

Notes: The 'inflow' of expenditure to the Borough's shops and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Gre
Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB I

TABLE 15: NEW RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	In centre	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Neighbourhood Centre	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green:	Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre:	In Centre	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL:		**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**

TABLE 16a: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.5%	82.1%	81.3%	81.5%	81.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£397.3	£399.4	£431.7	£474.7	£522.7	£532.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£93.0	£93.4	£99.1	£107.0	£115.9	£118.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£490.3	£492.8	£530.8	£581.7	£638.6	£650.0
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£490.3	£488.3	£483.5	£485.9	£488.3	£490.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.5	£47.4	£95.8	£150.3	£159.2
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	All other	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£66.3**	**-£61.0**	**-£18.3**	**£29.9**	**£84.3**	**£92.8**
STEP 11: !	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	-5,303	-4,900	-1,481	2,411	6,768	7,421
	(iii) Assumed Net / Gross Floorspace Ratio: !	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m): !	-7,576	-7,000	-2,116	3,444	9,668	10,601

STEP 1: Total available expenditure derived from Table 3. !

STEP 2: Retention level (%) for the study area at the base year (2015) derived from the revised market shares in Table 7a. Assume constant market shares over the forecast period. !

STEP 3: ! Retention level (£m) over the forecast period derived from Tables 7b, 7-12, assuming constant market shares. !

STEP 4&5 ! Estimated 'inflow' (% and £m) from outside the study area is derived from Table 14. The 'inflow' (trade draw) to the Borough's main stores and centres is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, as well as other published retail assessments in support of planning applications, healthchecks and other survey evidence. It takes into account a range of factors, including the likely impact of commuting patterns on available retail

STEP 6: ! Total forecast 'potential' turnover has been informed by the (survey-derived) revised market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5).

STEP 7: ! For the purpose of this assessment it has been assumed that the convenience goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified stores and floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the available evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new convenience goods floorspace, informed by Experian's latest growth forecasts and current research. For the purpose of this strategic assessment an annual average growth rate ranging from -0.4% to 0.1% has been assumed over the forecast period

STEP 8: ! The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7), assuming 'equilibrium' and constant market shares over the study period.

STEP 9: ! This step makes an allowance for all major convenience goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted) as set out in Table 15. It is assumed that all other commitments will be open and trading by 2018. In the case of Sainsbury's at Abbey Wood, although the store is actually located within the LB Greenwich it has been assumed that approximately 50% of its turnover will be drawn from within the LB Bexley area for the purpose of the retail capacity assessment. It has also been assumed that the new foodstore commitments will achieve 80% of their forecast 'benchmark' turnovers based on the significant new retail floorspace that will open in the next 5 years in the Borough and the increased level of competition and choice that will inevitably occur. It is noted that Tesco are no longer taking forward the planning permission for a superstore in Bexleyheath and it is uncertain whether the site will be delivered for retail.

STEP 10: ! The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)).

STEP 11: The 'net' residual expenditure is converted into a net floorspace capacity estimate based on the assumed average sales performance of the main food/grocery retailer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and M&S) of approximately £12,500 per m^2. It is assumed for the purpose of this strategic assessment that other food supermarket retailers (e.g. Co-Op, Budgens, Iceland, etc.) and 'deep discount' food retailers (e.g. Aldi and Lidl) achieve average sales levels of approximately half that assumed for the 'top 6' food operators (i.e. circa £6,000 per sq m). However, the final capacity forecasts will vary depending on the individual operator, as some operators are achieving signficantly

TABLE 16b: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.5%	82.1%	81.3%	81.5%	81.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£397.3	£399.4	£431.7	£474.7	£522.7	£532.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	£0.2	£0.2	£0.2	£0.2	£0.2	£0.2
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£93.0	£93.4	£99.1	£107.0	£115.9	£118.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£490.3	£492.8	£530.8	£581.7	£638.6	£650.0
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£490.3	£488.3	£483.5	£485.9	£488.3	£490.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.5	£47.4	£95.8	£150.3	£159.2
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath - assume no development in study	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Imperial Gateway	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£32.2**	**£31.9**	**£31.9**	**£32.1**	**£32.1**	**£33.3**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£32.2**	**-£27.4**	**£15.4**	**£63.7**	**£118.2**	**£125.9**
STEP 11: !	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,580**	**-2,198**	**1,253**	**5,145**	**9,491**	**10,064**
	(iii) Assumed Net / Gross Floorspace Ratio: !	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m): !	-3,685	-3,141	1,790	7,350	13,558	14,377

Carter Jonas

TABLE 17: FOODSTORE & CONVENIENCE GOODS FLOORSPACE IN MAIN CENTRES & FORECAST 'BENCHMARK' TURNOVERS

			Estimated Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2015	2016	2021	2026	2031
ZONE 1 - BELVEDERE DISTRICT CENTRE									
	Co-Op	56-64 Nuxley Road	338	£7,700	£2.6	£2.6	£2.6	£2.6	£2.6
	Budgens	72 Nuxley Road	291	£5,800	£1.7	£1.7	£1.7	£1.7	£1.7
	TOTAL:		**628**	**£6,821**	**£4.3**	**£4.3**	**£4.2**	**£4.2**	**£4.3**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE:									
	Morrisons	James Watt Way	3,223	£12,800	£41.3	£41.1	£40.7	£40.9	£41.1
	Other		969	£5,000	£4.8	£4.8	£4.8	£4.8	£4.8
	TOTAL:		**4,192**	**£10,997**	**£46.1**	**£45.9**	**£45.5**	**£45.7**	**£45.9**
ZONE 3 -WELLING MAJOR DISTRICT CENTRE									
	Morrisons	High Street	2,969	£12,800	£38.0	£37.9	£37.5	£37.7	£37.9
	Tesco	Embassy Court	2,813	£11,500	£32.3	£32.2	£31.9	£32.1	£32.2
	Lidl	Upper Wickham Lane	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3
	Other		1,746	£5,579	£9.7	£9.7	£9.6	£9.7	£9.7
	TOTAL:		**8,378**	**£9,956**	**£83.4**	**£83.1**	**£82.2**	**£82.7**	**£83.1**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE									
	Asda	160 Broadway, Graham Road	3,063	£13,400	£41.0	£40.9	£40.5	£40.7	£40.9
	Sainsbury's	72 Broadway	1,464	£13,200	£19.3	£19.2	£19.1	£19.2	£19.2
	Other		3,091	£7,536	£23.3	£23.2	£23.0	£23.1	£23.2
	TOTAL:		**7,618**	**£10,982**	**£83.7**	**£83.3**	**£82.5**	**£82.9**	**£83.3**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE									
	Sainsbury's	Stadium Way	5,574	£13,200	£73.6	£73.3	£72.6	£72.9	£73.3
	Other		1,004	£5,795	£5.8	£5.8	£5.7	£5.8	£5.8
	TOTAL:		**6,578**	**£12,070**	**£79.4**	**£79.1**	**£78.3**	**£78.7**	**£79.1**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE									
	Morrisons	1 Jenner Close	1,840	£12,800	£23.6	£23.5	£23.2	£23.3	£23.5
	Waitrose	High Street	531	£12,500	£6.6	£6.6	£6.5	£6.6	£6.6
	Other		1,800	£6,596	£11.9	£11.8	£11.7	£11.8	£11.8
	TOTAL:		**3,640**	**£11,555**	**£42.1**	**£41.9**	**£41.5**	**£41.7**	**£41.9**
OTHER MAJOR SUPERMARKETS & CONVENIENCE STORES IN LB BEXLEY:									
Zone 1:	Former Tesco Express	21 Picardy Street, Belvedere	431	£6,000	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 1:	Asda	Station Road, Belvedere	2,170	£13,400	£29.1	£29.0	£28.7	£28.8	£29.0
Zone 2:	Co-Op	Bexley Road, Northumberland Heath	294	£7,700	£2.3	£2.3	£2.2	£2.2	£2.3
Zone 4:	Co-Op	Falconwood Parade	275	£7,700	£2.1	£2.1	£2.1	£2.1	£2.1
Zone 3:	Co-Op	301-303 Brampton Rd	175	£7,700	£1.3	£1.3	£1.3	£1.3	£1.3
Zone 4:	Asda	13-15 Crook Log, Bexleyheath	523	£13,400	£7.0	£7.0	£6.9	£6.9	£7.0
Zone 4:	Sainsbury's Local	81-87 Avenue Road, Bexleyheath	200	£13,200	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 4:	Sainsbury's Local	287 Brampton Road	313	£13,200	£4.1	£4.1	£4.1	£4.1	£4.1
Zone 4:	Co-Op	4-12 Pickford Lane, Bexleyheath	250	£7,700	£1.9	£1.9	£1.9	£1.9	£1.9
Zone 4:	Co-Op	131-135 Long Lane	350	£7,700	£2.7	£2.7	£2.7	£2.7	£2.7
Zone 4:	Sainsbury's Local	Erith Rd, Barnehurst	300	£13,200	£4.0	£3.9	£3.9	£3.9	£3.9
Zone 6:	Tesco Express	Station Rd, Sidcup N/hood Centre	275	£11,500	£3.2	£3.1	£3.1	£3.1	£3.1
Zone 6:	Lidl	Footscray High Street	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3
Zone 6:	Co-Op	Westwood Lane, Blackfen	425	£7,700	£3.3	£3.3	£3.2	£3.2	£3.3
	TOTAL:		**6,831**	**£10,174**	**£69.5**	**£69.2**	**£68.5**	**£68.9**	**£69.2**

Notes: The convenience goods sales areas for stores have been derived from a variety of sources, including: the 2008 joint Greenwich & Bexley Retail Study and the retail assessments prepared in support of various planning applications for new foodstores in LB Bexley.

The base year 'benchmark' average sales densities for individual stores and operators have been informed by the latest published research and a wide range of retail studies. Assume a 'productivity' growth rate for existing floorspace ranging from -0.4% to +0.1% per annum over the forecast period.

Tesco have announced plans to close the Tesco Express Belvedere store (press release on 28th January 2015). Therefore, we have assumed that the existing store will be occupied by a supermarket (e.g. Co-operative) or Symbol retailer (e.g. Nisa, Londis, etc.)

TABLE 18: DIFFERENCE BETWEEN 'POTENTIAL' & 'BENCHMARK' TURNOVERS

				DIFFERENCE (£ million)					
				2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE									
	Co-Op	56-64 Nuxley Road		-£0.7	-£0.7	£0.0	£1.1	£1.5	£1.5
	Budgens	72 Nuxley Road		-£0.8	-£0.8	-£0.6	-£0.2	£0.0	£0.0
			Sub-total	**-£1.6**	**-£1.5**	**-£0.6**	**£0.8**	**£1.4**	**£1.5**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE									
	Asda	Station Road	**Sub-total**	**-£8.1**	**-£7.7**	**-£1.0**	**£8.4**	**£13.6**	**£14.0**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE									
	Morrisons	James Watt Way		£11.7	£12.2	£21.3	£29.2	£43.9	£45.2
	Other			-£2.6	-£2.5	-£2.0	-£1.6	-£1.0	-£0.9
			Sub-total	**£9.1**	**£9.6**	**£19.2**	**£27.7**	**£43.0**	**£44.2**
ZONE 3- WELLING MAJOR DISTRICT CENTRE									
	Morrisons	High Street		-£4.0	-£3.8	-£2.6	-£1.0	£0.1	£0.5
	Tesco	Embassy Court		£6.3	£6.5	£7.8	£9.7	£11.2	£11.7
	Lidl	Upper Wickham Lane		£0.6	£0.6	£1.0	£1.6	£1.9	£1.9
	Other			-£2.3	-£2.2	-£2.0	-£1.8	-£1.5	-£1.4
			Sub-total	**£0.7**	**£1.1**	**£4.3**	**£8.6**	**£11.7**	**£12.7**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE									
	Asda	160 Broadway, Graham Road		£35.4	£35.9	£40.9	£47.8	£54.5	£56.1
	Sainsbury's	72 Broadway		£0.3	£0.5	£1.8	£3.3	£5.0	£5.4
	Other			-£10.6	-£10.4	-£9.2	-£8.0	-£6.5	-£6.3
			Sub-total	**£25.1**	**£26.0**	**£33.4**	**£43.1**	**£52.9**	**£55.2**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:									
	Asda, Crook Log (former Netto)		**Sub-total**	**£0.0**	**£0.1**	**£0.4**	**£0.8**	**£1.2**	**£1.4**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE									
	Sainsbury's			-£0.6	£0.3	£6.2	£12.1	£20.8	£22.3
	Other			-£3.9	-£3.8	-£3.7	-£3.6	-£3.5	-£3.5
			Sub-total	**-£4.4**	**-£3.5**	**£2.5**	**£8.6**	**£17.3**	**£18.8**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE									
	Morrisons			£26.1	£26.4	£27.5	£29.2	£30.6	£31.5
	Waitrose			-£1.8	-£1.8	-£1.7	-£1.6	-£1.5	-£1.4
	Other			-£10.5	-£10.5	-£10.4	-£10.4	-£10.4	-£10.4
			Sub-total	**£13.7**	**£14.1**	**£15.5**	**£17.2**	**£18.8**	**£19.6**
TOTAL:				**£34.5**	**£38.2**	**£73.7**	**£115.2**	**£159.9**	**£167.5**

Notes: The difference in turnover levels identified by Table 14 and Table 17.

TABLE 19a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	19.6%	19.6%	19.1%	18.7%	18.4%	18.5%
STEP 3:	**'RETENTION' LEVEL (£m):**	£94.5	£95.0	£100.6	£109.2	£118.0	£120.4
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	20%	20%	20%	20%	20%	20%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.1	£23.2	£24.6	£26.7	£28.8	£29.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£117.6	£118.2	£125.2	£135.9	£146.9	£149.8
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£117.6	£117.1	£116.0	£116.5	£117.1	£117.7
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£9.3	£19.4	£29.7	£32.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£37.0**	**-£35.5**	**-£27.4**	**-£17.4**	**-£7.1**	**-£4.9**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,959**	**-2,848**	**-2,220**	**-1,407**	**-572**	**-392**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,227	-4,069	-3,171	-2,010	-817	-561

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 19b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO STORE COMMITMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	19.6%	19.6%	19.1%	18.7%	18.4%	18.5%
STEP 3:	**'RETENTION' LEVEL (£m):**	£94.5	£95.0	£100.6	£109.2	£118.0	£120.4
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19.7%	19.7%	19.7%	19.7%	19.7%	19.7%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.1	£23.2	£24.6	£26.7	£28.8	£29.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£117.6	£118.2	£125.2	£135.9	£146.9	£149.8
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£117.6	£117.1	£116.0	£116.5	£117.1	£117.7
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£9.3	£19.4	£29.7	£32.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£2.9**	**-£1.8**	**£6.3**	**£16.4**	**£26.8**	**£29.2**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-236**	**-146**	**514**	**1,327**	**2,152**	**2,331**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-337	-209	735	1,896	3,074	3,330

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 20: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	11.7%	11.8%	11.6%	11.2%	11.3%	11.3%
STEP 3:	**'RETENTION' LEVEL (£m):**	£56.40	£56.90	£60.81	£65.67	£72.47	£73.91
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.5	£18.7	£20.0	£21.6	£23.9	£24.3
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£74.9	£75.6	£80.8	£87.3	£96.3	£98.2
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£74.9	£74.6	£73.9	£74.3	£74.6	£75.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.0	£6.9	£13.0	£21.7	£23.2
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.0**	**£6.9**	**£13.0**	**£21.7**	**£23.2**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**77**	**560**	**1,049**	**1,742**	**1,856**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	111	800	1,498	2,488	2,651

TABLE 21: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£47.2	£47.4	£55.3	£62.7	£75.9	£77.2
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	15%	15%	15%	15%	15%	15%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£8.1	£8.1	£9.4	£10.7	£12.9	£13.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£55.2	£55.5	£64.7	£73.3	£88.9	£90.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£55.2	£55.0	£54.5	£54.7	£55.0	£55.3
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£10.2	£18.6	£33.9	£35.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£10.2**	**£18.6**	**£33.9**	**£35.1**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**44**	**830**	**1,503**	**2,721**	**2,805**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	63	1,185	2,147	3,888	4,007

TABLE 22: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	13.5%	13.5%	12.8%	12.1%	11.5%	11.4%
STEP 3:	**'RETENTION' LEVEL (£m):**	£65.13	£65.22	£67.06	£70.74	£73.46	£74.61
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	23%	23%	22%	22%	22%	22%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.9	£19.0	£19.5	£20.5	£21.3	£21.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£84.1	£84.2	£86.5	£91.2	£94.7	£96.2
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£84.1	£83.7	£82.9	£83.3	£83.7	£84.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.4	£3.6	£7.9	£11.0	£12.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.4**	**£3.6**	**£7.9**	**£11.0**	**£12.1**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**35**	**294**	**640**	**884**	**965**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	51	420	914	1,262	1,378

TABLE 23: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	7.3%	7.3%	7.3%	7.3%	7.3%	7.3%
STEP 3:	**'RETENTION' LEVEL (£m):**	£35.3	£35.5	£36.1	£37.3	£38.4	£39.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	37%	37%	37%	37%	37%	37%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£20.5	£20.6	£20.9	£21.6	£22.3	£22.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£55.8	£56.0	£57.0	£58.9	£60.7	£61.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£55.8	£55.5	£55.0	£55.3	£55.5	£55.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£2.0	£3.7	£5.1	£5.9
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£2.0**	**£3.7**	**£5.1**	**£5.9**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**39**	**162**	**295**	**413**	**471**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	56	232	421	590	673

TABLE 24: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£652.2
STEP 2:	**'RETENTION' LEVEL (%):**	5.3%	5.4%	6.4%	7.8%	8.1%	8.1%
STEP 3:	**'RETENTION' LEVEL (£m):**	£25.7	£26.0	£33.8	£45.7	£52.2	£52.9
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	9%	9%	9%	9%	9%	9%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£2.5	£2.5	£3.2	£4.4	£5.0	£5.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£28.2	£28.5	£37.1	£50.0	£57.2	£57.9
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£28.2	£28.1	£27.8	£27.9	£28.1	£28.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.4	£9.3	£22.1	£29.1	£29.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Sainsbury's (Cross Quarter, Abbey Wood):	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	- Imperial Gateway (Norman Park, Picardy Manorway):	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
	- Southmere Village, Tavy Bridge, Thamesmead	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£29.3**	**-£28.5**	**-£19.7**	**-£7.1**	**-£0.1**	**£0.4**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**-2,344**	**-2,292**	**-1,600**	**-570**	**-6**	**29**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-3,349	-3,274	-2,286	-814	-9	41

TABLE 25: REST OF STUDY AREA: RESIDUAL FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£481.2	£483.9	£525.9	£584.2	£641.1	£0.3
STEP 2:	**'RETENTION' LEVEL FOR STUDY AREA (%):**	83%	83%	82%	81%	82%	82%
STEP 3:	**'RETENTION' LEVEL FOR STUDY AREA (£m):**	£73.1	£73.4	£78.1	£83.5	£92.3	£94.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	2%	2%	2%	2%	2%	2%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£1.4	£1.4	£1.5	£1.5	£1.7	£1.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£74.5	£74.8	£79.6	£85.0	£94.0	£95.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£74.5	£74.2	£73.5	£73.9	£74.2	£74.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.5	£6.1	£11.2	£19.7	£21.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.5**	**£6.1**	**£11.2**	**£19.7**	**£21.1**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**44**	**492**	**901**	**1,586**	**1,688**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	63	703	1,288	2,266	2,411

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Er

APPENDIX 4C: CONVENIENCE CAPACITY ASSESSMENT UPDATE - EXPERIAN POPULATION GROWTH SCENARIO

CONVENIENCE GOODS CAPACITY - EXPERIAN POPULATION PROJECTIONS

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	36,530	36,895	38,775	40,631	42,369	44,335
ZONE 2	Erith	46,279	46,734	49,056	51,364	53,557	56,022
ZONE 3	Welling	45,083	45,516	47,733	49,924	52,013	54,377
ZONE 4	Bexleyheath	32,843	33,175	34,860	36,531	38,113	39,893
ZONE 5	Crayford/Old Bexley	23,749	23,979	25,162	26,340	27,452	28,707
ZONE 6	Sidcup	56,619	57,165	59,989	62,788	65,385	68,326
STUDY AREA TOTAL:		**241,103**	**243,464**	**255,575**	**267,578**	**278,889**	**291,660**

Source: Experian MMG3 !
Notes: Population projections based the ONS's 2012-based Sub National Population Projections released in May 2014. !

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£1,829	£1,830	£1,861	£1,905	£1,951	£1,995
ZONE 2	Erith	£1,888	£1,890	£1,921	£1,967	£2,014	£2,060
ZONE 3	Welling	£2,093	£2,095	£2,130	£2,180	£2,232	£2,283
ZONE 4	Bexleyheath	£2,122	£2,124	£2,159	£2,211	£2,263	£2,315
ZONE 5	Crayford/Old Bexley	£2,120	£2,122	£2,157	£2,208	£2,261	£2,312
ZONE 6	Sidcup	£2,157	£2,159	£2,195	£2,247	£2,301	£2,353

Source: Average spend per capita estimates for each zone are derived from Experian *'2013 - Retail Area Planner'* Reports (2013 prices).
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian Retail Planner Briefing Note 12.1 (October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£66.8	£67.5	£72.1	£77.4	£82.6	£88.4	15.9%	32.4%
ZONE 2	Erith	£87.4	£88.3	£94.2	£101.0	£107.9	£115.4	15.6%	32.1%
ZONE 3	Welling	£94.4	£95.4	£101.6	£108.9	£116.1	£124.2	15.4%	31.6%
ZONE 4	Bexleyheath	£69.7	£70.5	£75.3	£80.8	£86.3	£92.3	15.9%	32.5%
ZONE 5	Crayford/Old Bexley	£50.3	£50.9	£54.3	£58.2	£62.1	£66.4	15.5%	31.9%
ZONE 6	Sidcup	£122.1	£123.4	£131.6	£141.1	£150.4	£160.8	15.5%	31.6%
TOTAL		**£490.7**	**£496.0**	**£529.2**	**£567.3**	**£605.4**	**£647.5**	**15.6%**	**31.9%**

Source: Expenditure calculated from Tables 1 & 2.

Carter Jonas

TABLE 4: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

			ZONE 1 Belvedere %	ZONE 2 Erith %	ZONE 3 Welling %	ZONE 4 Bexleyheath %	ZONE 5 Crayford/ Old Bexley %	ZONE 6 Sidcup %	TOTAL %
ZONE 1 - BELVEDERE: DISTRICT CENTRE									
	Co-Op		3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
	Budgens		1.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%
	Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		SUB TOTAL:	**5.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE									
	Morrisons		17.4%	39.5%	0.7%	4.6%	3.7%	0.0%	10.5%
	Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.4%
		SUB TOTAL:	**18.3%**	**41.1%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**10.9%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE									
	All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.0%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE									
	Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.4%
	Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.1%
	Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
	Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
	Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
		SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.8%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE									
	Asda		10.5%	8.4%	16.2%	26.4%	12.5%	6.7%	13.0%
	Sainsbury's		1.5%	2.0%	2.3%	10.2%	5.6%	2.0%	3.6%
	Marks & Spencer		1.7%	2.9%	1.3%	5.6%	4.8%	1.1%	2.6%
	Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
		SUB TOTAL:	**14.0%**	**13.9%**	**19.9%**	**43.3%**	**23.1%**	**10.1%**	**19.6%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:									
	Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**5.2%**	**1.0%**	**0.6%**	**1.5%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE									
	Sainsbury's		6.8%	14.3%	4.3%	21.1%	29.7%	5.0%	11.8%
	Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
		SUB TOTAL:	**6.8%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**12.1%**
ZONE 5 - BEXLEY: DISTRICT CENTRE									
	All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE									
	Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	23.3%	6.6%
	Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.2%
		SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**24.2%**	**6.8%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE									
	All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.2%**
NEIGHBOURHOOD CENTRES:									
Zone 1:	Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1:	Tesco Express, Picardy Street		4.6%	1.4%	0.0%	0.0%	0.1%	0.0%	0.9%
Zone 2:	Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3:	Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4:	Bexleyheath		1.9%	2.3%	1.8%	10.7%	0.7%	0.4%	2.8%
Zone 5:	Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6:	Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	6.1%	1.6%
Zone 6:	Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6:	North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
		SUB TOTAL:	**7.4%**	**5.9%**	**10.3%**	**13.9%**	**3.2%**	**8.9%**	**8.6%**
ALL OTHER LOCAL STORES		**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.7%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**60.2%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**67.9%**	**81.7%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA									
Abbey Wood - Lidl (1A Eynsham Drive)			3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley			0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton			0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford			1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.2%
Eltham			0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside			0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater			0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe			0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich			0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington			0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup			0.1%	0.0%	1.9%	0.8%	9.3%	16.9%	5.5%
Thamesmead (Morrisons)			29.6%	0.7%	2.1%	0.4%	0.0%	0.0%	4.6%
Thamesmead (Other)			1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich			0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores			1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**39.8%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**32.1%**	**18.3%**
	TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone.

TABLE 5: ALL CONVENIENCE GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (£m)

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
TOTAL AVAILABLE SPEND (£M):	£66.8	£87.4	£94.4	£69.7	£50.3	£122.1	£490.7
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Budgens	£1.2	£0.3	£0.0	£0.0	£0.0	£0.0	£1.5
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£11.6	£34.5	£0.7	£3.2	£1.8	£0.04	£51.9
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.8	£0.0	£0.0	£0.0	£0.0	£10.1
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£20.1	£2.0	£0.2	£3.1	£26.3
Tesco	£1.0	£0.5	£23.6	£1.3	£0.0	£3.6	£30.0
Tesco Express	£0.0	£0.3	£1.4	£0.2	£0.3	£1.5	£3.6
Lidl	£0.8	£0.0	£2.2	£0.1	£0.0	£0.6	£3.6
Other	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£3.8
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£7.0	£7.4	£15.3	£18.4	£6.3	£8.2	£62.6
Sainsbury's	£1.0	£1.8	£2.2	£7.1	£2.8	£2.5	£17.4
Marks & Spencer	£1.1	£2.6	£1.2	£3.9	£2.4	£1.3	£12.6
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.8
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.9	£3.6	£0.5	£0.7	£7.2
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£4.6	£12.5	£4.1	£14.7	£15.0	£6.1	£56.9
Other	£0.0	£0.0	£0.0	£0.3	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£3.8	£28.4	£33.3
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.6	£11.3
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£3.1	£1.2	£0.0	£0.0	£0.0	£0.0	£4.3
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3: Welling	£0.2	£0.5	£8.0	£0.9	£0.2	£0.0	£9.8
Zone 4: Bexleyheath	£1.3	£2.0	£1.7	£7.4	£0.4	£0.5	£13.3
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£7.5	£8.3
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.9	£3.1
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4
ALL OTHER LOCAL STORES	£2.2	£3.9	£0.5	£1.3	£0.6	£5.1	£13.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£40.2**	**£81.1**	**£88.8**	**£67.7**	**£38.7**	**£83.0**	**£399.5**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford	£1.0	£1.0	£0.3	£0.2	£2.0	£1.7	£6.1
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£5.0	£5.4
Lakeside	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.3	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.6	£2.9
Orpington	£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.7
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.7	£20.7	£27.8
Thamesmead (Morrisons)	£19.8	£0.6	£2.0	£0.3	£0.0	£0.0	£22.7
Thamesmead (Other)	£1.0	£0.9	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.3	£2.4
All Other Stores	£0.9	£0.1	£0.1	£0.6	£3.8	£6.8	£12.3
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£26.6**	**£6.3**	**£5.6**	**£2.0**	**£11.6**	**£39.1**	**£91.2**
TOTAL MARKET SHARE:	**£66.8**	**£87.4**	**£94.4**	**£69.7**	**£50.3**	**£122.1**	**£490.7**

Notes: Available expenditure in each zone has been allocated to all existing stores/floorspace based on the market share analysis (%) set out in Table 4.

TABLE 6: NEW CONVENIENCE RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	2015 Turnover	Estimated Trade Draw				
				Zone 1	Zone 2	Zone 4	Zone 6	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%	%	%
Asda , Station Road, Belevedere	2170	£13,400	£29.1	50%	15%			35%
Waitrose, High Street, Sidcup	531	£12,500	£6.6	0%	0%	0%	65%	35%
Sainsbury's Local, 287 Brampton Rd, near Bexleyheath	313	£13,200	£4.1	0%	0%	80%	0%	20%

Notes: Elsewhere equates to trade draw from outside of the Borough

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TABLE 7a: ALL CONVENIENCE GOODS SHOPPING - REVISED 2015 MARKET SHARE ANALYSIS (%)

		ZONE 1 Belvedere %	ZONE 2 Erith %	ZONE 3 Welling %	ZONE 4 Bexleyheath %	ZONE 5 Crayford/ Old Bexley %	ZONE 6 Sidcup %	TOTAL %
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op		2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Budgens		0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Other		0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	**3.7%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**SUB TOTAL:**	**21.8%**	**5.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.9%**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons		12.0%	36.0%	0.7%	4.6%	3.7%	0.0%	9.2%
Other		0.9%	1.6%	0.0%	0.0%	0.3%	0.0%	0.4%
	SUB TOTAL:	**12.9%**	**37.7%**	**0.7%**	**4.6%**	**4.0%**	**0.0%**	**9.7%**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**SUB TOTAL:**	**0.4%**	**11.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons		1.2%	0.1%	21.3%	2.8%	0.5%	2.5%	5.4%
Tesco		1.5%	0.6%	25.0%	1.8%	0.0%	3.0%	6.1%
Tesco Express		0.0%	0.3%	1.4%	0.3%	0.5%	1.2%	0.7%
Lidl		1.1%	0.0%	2.3%	0.1%	0.0%	0.5%	0.7%
Other		0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.8%
	SUB TOTAL:	**3.8%**	**1.0%**	**54.1%**	**5.0%**	**1.0%**	**7.2%**	**13.7%**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda		7.3%	6.9%	16.2%	26.0%	12.5%	6.5%	11.9%
Sainsbury's		1.5%	2.0%	2.3%	9.7%	5.6%	2.0%	3.5%
Marks & Spencer		1.7%	2.9%	1.3%	5.2%	4.8%	1.1%	2.5%
Other		0.3%	0.5%	0.1%	1.0%	0.1%	0.3%	0.4%
	SUB TOTAL:	**10.7%**	**12.4%**	**19.9%**	**41.9%**	**23.1%**	**9.9%**	**18.3%**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**SUB TOTAL:**	**0.3%**	**0.3%**	**2.0%**	**4.7%**	**1.0%**	**0.6%**	**1.4%**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's		4.7%	14.3%	4.3%	21.1%	29.7%	5.0%	11.3%
Other		0.0%	0.0%	0.0%	0.4%	2.8%	0.0%	0.3%
	SUB TOTAL:	**4.7%**	**14.3%**	**4.3%**	**21.5%**	**32.5%**	**5.0%**	**11.6%**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)	**SUB TOTAL:**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.2%**	**0.0%**	**0.5%**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons		0.0%	0.1%	0.3%	0.9%	7.6%	21.3%	6.3%
Waitrose		0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.9%
Other		0.0%	0.0%	0.1%	0.0%	0.0%	0.9%	0.3%
	SUB TOTAL:	**0.0%**	**0.1%**	**0.5%**	**0.9%**	**7.6%**	**25.8%**	**7.4%**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**SUB TOTAL:**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**7.8%**	**2.3%**
NEIGHBOURHOOD CENTRES:								
Zone 1: Abbey Wood - Local Shops		0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1: Tesco Express, Picardy Street (to close)		3.5%	1.4%	0.0%	0.0%	0.1%	0.0%	0.7%
Zone 2: Erith		0.0%	1.6%	0.0%	0.0%	0.3%	0.0%	0.3%
Zone 3: Welling		0.4%	0.6%	8.4%	1.3%	0.4%	0.0%	2.0%
Zone 4: Bexleyheath		1.9%	2.3%	1.8%	7.8%	0.7%	0.4%	2.3%
- including Sainsbury's 287 Local Brampton Road		0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.7%
Zone 5: Crayford & Old Bexley		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6: Sidcup (incl Tesco Express & Co-Op)		0.0%	0.0%	0.1%	0.0%	1.3%	5.4%	1.5%
Zone 6: Foots Cray (incl Lidl)		0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	0.6%
Zone 6: North Cray		0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.3%
	SUB TOTAL:	**6.3%**	**5.9%**	**10.3%**	**15.8%**	**3.2%**	**8.2%**	**8.5%**
ALL OTHER LOCAL STORES	**SUB TOTAL:**	**3.3%**	**4.4%**	**0.5%**	**1.9%**	**1.3%**	**4.2%**	**2.8%**
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**67.8%**	**92.8%**	**94.1%**	**97.1%**	**77.0%**	**68.7%**	**82.6%**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Bromley		0.1%	0.4%	0.0%	0.0%	1.6%	0.3%	0.3%
Charlton		0.5%	0.7%	0.0%	0.0%	0.0%	0.1%	0.2%
Dartford		1.4%	1.1%	0.3%	0.3%	4.0%	1.4%	1.2%
Eltham		0.2%	0.0%	0.3%	0.0%	0.0%	4.1%	1.1%
Lakeside		0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Bluewater		0.8%	0.6%	0.5%	0.1%	0.1%	0.1%	0.4%
Greenhithe		0.1%	0.3%	0.0%	0.0%	0.0%	0.2%	0.1%
Greenwich		0.1%	0.2%	0.1%	0.1%	0.0%	2.1%	0.6%
Orpington		0.0%	0.2%	0.0%	0.0%	0.6%	1.0%	0.3%
Tesco - off Edgington Way, nr Sidcup		0.1%	0.0%	1.9%	0.8%	9.3%	16.2%	5.5%
Thamesmead (Morrisons)		22.0%	0.7%	2.1%	0.4%	0.0%	0.0%	3.6%
Thamesmead (Other)		1.6%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%
Woolwich		0.7%	1.8%	0.2%	0.0%	0.0%	0.2%	0.5%
All Other Stores		1.3%	0.2%	0.1%	0.9%	7.5%	5.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA		**32.2%**	**7.2%**	**5.9%**	**2.9%**	**23.0%**	**31.3%**	**17.4%**
TOTAL MARKET SHARE:		**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes: Market shares for all convenience goods shopping have been derived from the household telephone interview survey and weighted by the available expenditure in each zone.

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
	TOTAL AVAILABLE FOOD SPEND (£M):	**£66.8**	**£87.4**	**£94.4**	**£69.7**	**£50.3**	**£122.1**	**£490.7**
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7
	Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
	Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£14.54	£4.36	£0.00	£0.00	£0.00	£0.00	£18.9
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£8.0	£31.5	£0.7	£3.2	£1.8	£0.0	£45.3
	Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.3	£9.8	£0.0	£0.0	£0.0	£0.0	£10.1
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£0.8	£0.1	£20.1	£2.0	£0.2	£3.1	£26.3
	Tesco	£1.0	£0.5	£23.6	£1.3	£0.0	£3.6	£30.0
	Tesco Express	£0.0	£0.3	£1.4	£0.2	£0.3	£1.5	£3.6
	Lidl	£0.8	£0.0	£2.2	£0.1	£0.0	£0.6	£3.6
	Other	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£3.8
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£4.9	£6.1	£15.3	£18.1	£6.3	£8.0	£58.6
	Sainsbury's	£1.0	£1.8	£2.2	£6.8	£2.8	£2.5	£17.0
	Marks & Spencer	£1.1	£2.6	£1.2	£3.6	£2.4	£1.3	£12.3
	Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.8
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.2	£0.3	£1.9	£3.3	£0.5	£0.7	£6.9
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£3.1	£12.5	£4.1	£14.7	£15.0	£6.1	£55.5
	Other	£0.0	£0.0	£0.0	£0.3	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.1	£0.3	£0.6	£3.8	£26.1	£30.9
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£4.3
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.2
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.6	£11.3
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1:	Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.6
Zone 2:	Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3:	Welling	£0.2	£0.5	£8.0	£0.9	£0.2	£0.0	£9.8
Zone 4:	Bexleyheath (including Sainsbury's Local Brampton Road)	£1.3	£2.0	£1.7	£8.8	£0.4	£0.5	£14.6
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.6	£7.4
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.9	£3.1
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4
ALL OTHER LOCAL STORES		£2.2	£3.9	£0.5	£1.3	£0.6	£5.1	£13.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£45.3**	**£81.1**	**£88.8**	**£67.7**	**£38.7**	**£83.8**	**£405.5**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley		£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton		£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.1
Dartford		£1.0	£1.0	£0.3	£0.2	£2.0	£1.7	£6.1
Eltham		£0.1	£0.0	£0.3	£0.0	£0.0	£5.0	£5.4
Lakeside		£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.4
Bluewater		£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe		£0.1	£0.3	£0.0	£0.0	£0.0	£0.3	£0.6
Greenwich		£0.0	£0.1	£0.1	£0.0	£0.0	£2.6	£2.9
Orpington		£0.0	£0.1	£0.0	£0.0	£0.3	£1.2	£1.7
Tesco - off Edgington Way, nr Sidcup		£0.0	£0.0	£1.8	£0.6	£4.7	£19.8	£26.9
Thamesmead (Morrisons)		£14.7	£0.6	£2.0	£0.3	£0.0	£0.0	£17.6
Thamesmead (Other)		£1.0	£0.9	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich		£0.5	£1.5	£0.2	£0.0	£0.0	£0.3	£2.4
All Other Stores		£0.9	£0.1	£0.1	£0.6	£3.8	£6.8	£12.3
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£21.5**	**£6.3**	**£5.6**	**£2.0**	**£11.6**	**£38.3**	**£85.2**
	TOTAL MARKET SHARE:	**£66.8**	**£87.4**	**£94.4**	**£69.7**	**£50.3**	**£122.1**	**£490.7**

TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£67.5**	**£88.3**	**£95.4**	**£70.5**	**£50.9**	**£123.4**	**£496.0**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£14.70	£4.4	£0.0	£0.0	£0.0	£0.0	£19.1
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£8.1	£31.8	£0.7	£3.3	£1.9	£0.0	£45.7
Other	£0.6	£1.4	£0.0	£0.0	£0.2	£0.0	£2.2
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.3	£9.9	£0.0	£0.0	£0.0	£0.0	£10.2
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.8	£0.1	£20.4	£2.0	£0.2	£3.1	£26.6
Tesco	£1.0	£0.5	£23.8	£1.3	£0.0	£3.7	£30.3
Tesco Express	£0.0	£0.3	£1.4	£0.2	£0.3	£1.5	£3.6
Lidl	£0.8	£0.0	£2.2	£0.1	£0.0	£0.6	£3.7
Other	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£3.8
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£4.9	£6.1	£15.4	£18.3	£6.4	£8.1	£59.2
Sainsbury's	£1.0	£1.8	£2.2	£6.9	£2.8	£2.5	£17.2
Marks & Spencer	£1.1	£2.6	£1.2	£3.6	£2.5	£1.3	£12.4
Other	£0.2	£0.4	£0.1	£0.7	£0.1	£0.3	£1.8
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.2	£0.3	£1.9	£3.3	£0.5	£0.7	£7.0
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.1	£12.7	£4.1	£14.9	£15.1	£6.1	£56.1
Other	£0.0	£0.0	£0.0	£0.3	£1.4	£0.0	£1.7
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.6	£1.6	£0.0	£2.2
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.3	£0.6	£3.9	£26.3	£31.3
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£4.4
Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.1	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£1.7	£0.0	£0.0	£9.7	£11.4
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1: Belvedere (incl Picardy Street)	£2.4	£1.2	£0.0	£0.0	£0.0	£0.0	£3.7
Zone 2: Erith	£0.0	£1.4	£0.0	£0.0	£0.2	£0.0	£1.6
Zone 3: Welling	£0.2	£0.5	£8.0	£0.9	£0.2	£0.0	£9.9
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.3	£2.1	£1.7	£8.9	£0.4	£0.5	£14.7
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£6.7	£7.5
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£2.9	£3.1
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4
ALL OTHER LOCAL STORES	£2.2	£3.9	£0.5	£1.3	£0.7	£5.2	£13.7
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£45.8**	**£82.0**	**£89.7**	**£68.4**	**£39.2**	**£84.7**	**£409.8**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.4
Bromley	£0.0	£0.3	£0.0	£0.0	£0.8	£0.3	£1.5
Charlton	£0.4	£0.6	£0.0	£0.0	£0.0	£0.1	£1.2
Dartford	£1.0	£1.0	£0.3	£0.2	£2.0	£1.7	£6.2
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£5.0	£5.4
Lakeside	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater	£0.5	£0.5	£0.5	£0.0	£0.0	£0.2	£1.8
Greenhithe	£0.1	£0.3	£0.0	£0.0	£0.0	£0.3	£0.6
Greenwich	£0.0	£0.1	£0.1	£0.0	£0.0	£2.6	£2.9
Orpington	£0.0	£0.2	£0.0	£0.0	£0.3	£1.2	£1.7
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£1.8	£0.6	£4.7	£20.0	£27.2
Thamesmead (Morrisons)	£14.8	£0.6	£2.0	£0.3	£0.0	£0.0	£17.8
Thamesmead (Other)	£1.1	£0.9	£0.0	£0.2	£0.0	£0.0	£2.1
Woolwich	£0.5	£1.5	£0.2	£0.0	£0.0	£0.3	£2.5
All Other Stores	£0.9	£0.1	£0.1	£0.7	£3.8	£6.8	£12.4
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£21.7**	**£6.4**	**£5.6**	**£2.0**	**£11.7**	**£38.7**	**£86.2**
TOTAL MARKET SHARE:	**£67.5**	**£88.3**	**£95.4**	**£70.5**	**£50.9**	**£123.4**	**£496.0**

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

		ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
	TOTAL AVAILABLE FOOD SPEND (£M):	£72.1	£94.2	£101.6	£75.3	£54.3	£131.6	£529.2
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
	Co-Op	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
	Budgens	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
	Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
	Asda, Station Road	£15.7	£4.7	£0.0	£0.0	£0.0	£0.0	£20.4
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
	Morrisons	£8.6	£34.0	£0.7	£3.5	£2.0	£0.0	£48.8
	Other	£0.6	£1.5	£0.0	£0.0	£0.2	£0.0	£2.3
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
	All Shops (incl Tesco & Co-Op)	£0.3	£10.6	£0.0	£0.0	£0.0	£0.0	£10.9
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
	Morrisons	£0.9	£0.1	£21.7	£2.1	£0.3	£3.3	£28.4
	Tesco	£1.1	£0.6	£25.4	£1.4	£0.0	£3.9	£32.3
	Tesco Express	£0.0	£0.3	£1.5	£0.2	£0.3	£1.6	£3.9
	Lidl	£0.8	£0.0	£2.4	£0.1	£0.0	£0.7	£3.9
	Other	£0.0	£0.0	£4.0	£0.0	£0.0	£0.0	£4.0
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
	Asda	£5.2	£6.5	£16.4	£19.5	£6.8	£8.6	£63.2
	Sainsbury's	£1.1	£1.9	£2.3	£7.3	£3.0	£2.7	£18.4
	Marks & Spencer	£1.2	£2.8	£1.3	£3.9	£2.6	£1.4	£13.2
	Other	£0.2	£0.5	£0.1	£0.8	£0.1	£0.3	£1.9
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
	Asda, Crook Log (former Netto)	£0.2	£0.3	£2.0	£3.6	£0.6	£0.7	£7.4
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
	Sainsbury's	£3.4	£13.5	£4.4	£15.9	£16.1	£6.5	£59.9
	Other	£0.0	£0.0	£0.0	£0.3	£1.5	£0.0	£1.8
ZONE 5 - BEXLEY: DISTRICT CENTRE								
	All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.7	£1.7	£0.0	£2.4
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
	Morrisons	£0.0	£0.1	£0.3	£0.6	£4.1	£28.1	£33.4
	Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£4.7
	Other	£0.0	£0.0	£0.1	£0.0	£0.0	£1.2	£1.3
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
	All Shops (incl Tesco Express)	£0.0	£0.0	£1.9	£0.0	£0.0	£10.3	£12.2
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Zone 1:	Belvedere (incl Picardy Street)	£2.5	£1.3	£0.0	£0.0	£0.0	£0.0	£3.9
Zone 2:	Erith	£0.0	£1.5	£0.0	£0.0	£0.2	£0.0	£1.7
Zone 3:	Welling	£0.3	£0.6	£8.6	£0.9	£0.2	£0.0	£10.5
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)	£1.4	£2.2	£1.8	£9.5	£0.4	£0.5	£15.7
Zone 5:	Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.7	£7.2	£8.0
Zone 6:	Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.2	£3.1	£3.3
Zone 6:	North Cray	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£1.5
ALL OTHER LOCAL STORES		£2.3	£4.2	£0.5	£1.4	£0.7	£5.5	£14.6
BEXLEY BOROUGH - 'RETENTION' LEVEL:		**£48.9**	**£87.5**	**£95.6**	**£73.1**	**£41.8**	**£90.4**	**£437.3**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA								
Abbey Wood - Lidl (1A Eynsham Drive)		£2.5	£0.1	£0.0	£0.0	£0.0	£0.0	£2.6
Bromley		£0.0	£0.4	£0.0	£0.0	£0.9	£0.4	£1.6
Charlton		£0.4	£0.7	£0.0	£0.0	£0.0	£0.1	£1.2
Dartford		£1.0	£1.0	£0.3	£0.2	£2.2	£1.8	£6.6
Eltham		£0.1	£0.0	£0.3	£0.0	£0.0	£5.4	£5.8
Lakeside		£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.4
Bluewater		£0.6	£0.6	£0.5	£0.0	£0.0	£0.2	£2.0
Greenhithe		£0.1	£0.3	£0.0	£0.0	£0.0	£0.3	£0.7
Greenwich		£0.1	£0.1	£0.1	£0.0	£0.0	£2.8	£3.1
Orpington		£0.0	£0.2	£0.0	£0.0	£0.3	£1.3	£1.8
Tesco - off Edgington Way, nr Sidcup		£0.0	£0.0	£2.0	£0.6	£5.0	£21.3	£29.0
Thamesmead (Morrisons)		£15.9	£0.6	£2.2	£0.3	£0.0	£0.0	£19.0
Thamesmead (Other)		£1.1	£0.9	£0.0	£0.2	£0.0	£0.0	£2.3
Woolwich		£0.5	£1.7	£0.2	£0.0	£0.0	£0.3	£2.6
All Other Stores		£0.9	£0.2	£0.1	£0.7	£4.1	£7.3	£13.3
SUB-TOTAL-OUTSIDE BOROUGH AREA		**£23.2**	**£6.8**	**£6.0**	**£2.2**	**£12.5**	**£41.3**	**£91.9**
	TOTAL MARKET SHARE:	**£72.1**	**£94.2**	**£101.6**	**£75.3**	**£54.3**	**£131.6**	**£529.2**

Carter Jonas

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£77.4**	**£101.0**	**£108.9**	**£80.8**	**£58.2**	**£141.1**	**£567.3**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Budgens	£0.6	£0.3	£0.0	£0.0	£0.0	£0.0	£0.9
Other	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£16.85	£5.04	£0.00	£0.00	£0.00	£0.0	£21.9
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£9.28	£36.40	£0.76	£3.73	£2.13	£0.05	£52.4
Other	£0.68	£1.64	£0.00	£0.00	£0.19	£0.00	£2.5
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.34	£11.37	£0.00	£0.00	£0.00	£0.00	£11.7
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£0.95	£0.14	£23.24	£2.27	£0.29	£3.53	£30.4
Tesco	£1.15	£0.62	£27.17	£1.49	£0.00	£4.18	£34.6
Tesco Express	£0.00	£0.29	£1.58	£0.22	£0.30	£1.75	£4.1
Lidl	£0.88	£0.00	£2.52	£0.09	£0.00	£0.71	£4.2
Other	£0.00	£0.00	£4.34	£0.00	£0.00	£0.00	£4.3
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£5.62	£7.00	£17.61	£20.97	£7.29	£9.22	£67.7
Sainsbury's	£1.19	£2.05	£2.50	£7.85	£3.24	£2.88	£19.7
Marks & Spencer	£1.30	£2.96	£1.43	£4.18	£2.81	£1.50	£14.2
Other	£0.19	£0.50	£0.10	£0.81	£0.08	£0.36	£2.0
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.24	£0.33	£2.17	£3.82	£0.61	£0.80	£8.0
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.60	£14.49	£4.72	£17.05	£17.30	£7.01	£64.2
Other	£0.00	£0.00	£0.00	£0.29	£1.62	£0.00	£1.9
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.00	£0.00	£0.00	£0.71	£1.85	£0.00	£2.6
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.00	£0.13	£0.37	£0.69	£4.45	£30.12	£35.8
Waitrose	£0.00	£0.00	£0.00	£0.00	£0.00	£4.98	£5.0
Other	£0.00	£0.00	£0.15	£0.00	£0.00	£1.29	£1.4
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.00	£0.00	£1.99	£0.00	£0.00	£11.04	£13.0
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.4
Zone 1: Belvedere (incl Picardy Street)	£2.73	£1.42	£0.00	£0.00	£0.04	£0.00	£4.2
Zone 2: Erith	£0.00	£1.64	£0.00	£0.00	£0.18	£0.00	£1.8
Zone 3: Welling	£0.27	£0.60	£9.17	£1.02	£0.21	£0.00	£11.3
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.46	£2.36	£1.94	£10.16	£0.41	£0.56	£16.9
Zone 5: Crayford & Old Bexley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.00	£0.00	£0.13	£0.00	£0.78	£7.68	£8.6
Zone 6: Foots Cray (incl Lidl)	£0.00	£0.00	£0.00	£0.00	£0.24	£3.30	£3.5
Zone 6: North Cray	£0.00	£0.00	£0.00	£1.59	£0.00	£0.00	£1.6
ALL OTHER LOCAL STORES	£2.52	£4.46	£0.53	£1.51	£0.75	£5.90	£15.7
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£52.5**	**£93.8**	**£102.4**	**£78.4**	**£44.8**	**£96.9**	**£468.7**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.64	£0.15	£0.00	£0.00	£0.00	£0.00	£2.8
Bromley	£0.05	£0.39	£0.00	£0.00	£0.92	£0.39	£1.7
Charlton	£0.42	£0.74	£0.00	£0.00	£0.00	£0.15	£1.3
Dartford	£1.11	£1.11	£0.31	£0.24	£2.31	£1.98	£7.1
Eltham	£0.14	£0.00	£0.31	£0.00	£0.00	£5.76	£6.2
Lakeside	£0.00	£0.00	£0.40	£0.00	£0.00	£0.05	£0.4
Bluewater	£0.62	£0.60	£0.58	£0.05	£0.04	£0.21	£2.1
Greenhithe	£0.06	£0.34	£0.00	£0.00	£0.00	£0.30	£0.7
Greenwich	£0.05	£0.15	£0.10	£0.05	£0.00	£2.98	£3.3
Orpington	£0.00	£0.17	£0.00	£0.00	£0.34	£1.43	£1.9
Tesco - off Edgington Way, nr Sidcup	£0.05	£0.00	£2.10	£0.67	£5.40	£22.86	£31.1
Thamesmead (Morrisons)	£17.02	£0.68	£2.32	£0.35	£0.00	£0.00	£20.4
Thamesmead (Other)	£1.21	£0.98	£0.00	£0.22	£0.00	£0.00	£2.4
Woolwich	£0.53	£1.77	£0.23	£0.00	£0.00	£0.30	£2.8
All Other Stores	£1.02	£0.17	£0.09	£0.75	£4.39	£7.82	£14.2
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£24.9**	**£7.3**	**£6.4**	**£2.3**	**£13.4**	**£44.2**	**£98.6**
TOTAL MARKET SHARE:	**£77.4**	**£101.0**	**£108.9**	**£80.8**	**£58.2**	**£141.1**	**£567.3**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	**£82.6**	**£107.9**	**£116.1**	**£86.3**	**£62.1**	**£150.4**	**£605.4**
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Budgens	£0.6	£0.3	£0.0	£0.0	£0.0	£0.0	£1.0
Other	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£17.99	£5.38	£0.00	£0.00	£0.00	£0.00	£23.4
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£9.91	£38.86	£0.81	£3.99	£2.28	£0.05	£55.9
Other	£0.73	£1.75	£0.00	£0.00	£0.21	£0.00	£2.7
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.37	£12.14	£0.00	£0.00	£0.00	£0.00	£12.5
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£1.0	£0.1	£24.8	£2.4	£0.3	£3.8	£32.4
Tesco	£1.2	£0.7	£29.0	£1.6	£0.0	£4.5	£36.9
Tesco Express	£0.0	£0.3	£1.7	£0.2	£0.3	£1.9	£4.4
Lidl	£0.9	£0.0	£2.7	£0.1	£0.0	£0.8	£4.5
Other	£0.0	£0.0	£4.6	£0.0	£0.0	£0.0	£4.6
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£6.0	£7.5	£18.8	£22.4	£7.8	£9.8	£72.3
Sainsbury's	£1.3	£2.2	£2.7	£8.4	£3.5	£3.1	£21.0
Marks & Spencer	£1.4	£3.2	£1.5	£4.5	£3.0	£1.6	£15.1
Other	£0.2	£0.5	£0.1	£0.9	£0.1	£0.4	£2.2
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.3	£0.4	£2.3	£4.1	£0.6	£0.9	£8.5
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£3.8	£15.5	£5.0	£18.2	£18.5	£7.5	£68.5
Other	£0.0	£0.0	£0.0	£0.3	£1.7	£0.0	£2.0
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.8	£2.0	£0.0	£2.7
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.4	£0.7	£4.7	£32.1	£38.1
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£5.3	£5.3
Other	£0.0	£0.0	£0.2	£0.0	£0.0	£1.4	£1.5
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£2.1	£0.0	£0.0	£11.8	£13.9
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 1: Belvedere (incl Picardy Street)	£2.9	£1.5	£0.0	£0.0	£0.0	£0.0	£4.5
Zone 2: Erith	£0.0	£1.7	£0.0	£0.0	£0.2	£0.0	£1.9
Zone 3: Welling	£0.3	£0.6	£9.8	£1.1	£0.2	£0.0	£12.0
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.6	£2.5	£2.1	£10.9	£0.4	£0.6	£18.0
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.8	£8.2	£9.2
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.3	£3.5	£3.8
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£1.7
ALL OTHER LOCAL STORES	£2.7	£4.8	£0.6	£1.6	£0.8	£6.3	£16.7
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£56.1**	**£100.1**	**£109.3**	**£83.8**	**£47.8**	**£103.3**	**£500.2**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£2.8	£0.2	£0.0	£0.0	£0.0	£0.0	£3.0
Bromley	£0.0	£0.4	£0.0	£0.0	£1.0	£0.4	£1.9
Charlton	£0.5	£0.8	£0.0	£0.0	£0.0	£0.2	£1.4
Dartford	£1.2	£1.2	£0.3	£0.3	£2.5	£2.1	£7.5
Eltham	£0.1	£0.0	£0.3	£0.0	£0.0	£6.1	£6.6
Lakeside	£0.0	£0.0	£0.4	£0.0	£0.0	£0.1	£0.5
Bluewater	£0.7	£0.6	£0.6	£0.1	£0.0	£0.2	£2.2
Greenhithe	£0.1	£0.4	£0.0	£0.0	£0.0	£0.3	£0.7
Greenwich	£0.1	£0.2	£0.1	£0.1	£0.0	£3.2	£3.6
Orpington	£0.0	£0.2	£0.0	£0.0	£0.4	£1.5	£2.1
Tesco - off Edgington Way, nr Sidcup	£0.0	£0.0	£2.2	£0.7	£5.8	£24.4	£33.1
Thamesmead (Morrisons)	£18.2	£0.7	£2.5	£0.4	£0.0	£0.0	£21.7
Thamesmead (Other)	£1.3	£1.1	£0.0	£0.2	£0.0	£0.0	£2.6
Woolwich	£0.6	£1.9	£0.2	£0.0	£0.0	£0.3	£3.0
All Other Stores	£1.1	£0.2	£0.1	£0.8	£4.7	£8.3	£15.2
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£26.6**	**£7.8**	**£6.9**	**£2.5**	**£14.3**	**£47.2**	**£105.1**
TOTAL MARKET SHARE:	**£82.6**	**£107.9**	**£116.1**	**£86.3**	**£62.1**	**£150.4**	**£605.4**

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL CONVENIENCE GOODS SHOPPING

	ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
TOTAL AVAILABLE FOOD SPEND (£M):	£88.4	£115.4	£124.2	£92.3	£66.4	£160.8	£647.5
ZONE 1 - BELVEDERE: DISTRICT CENTRE							
Co-Op	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Budgens	£0.7	£0.4	£0.0	£0.0	£0.0	£0.0	£1.0
Other	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:							
Asda, Station Road	£19.2	£5.8	£0.0	£0.0	£0.0	£0.0	£25.0
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE							
Morrisons	£10.6	£41.6	£0.9	£4.3	£2.4	£0.1	£59.8
Other	£0.8	£1.9	£0.0	£0.0	£0.2	£0.0	£2.9
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE							
All Shops (incl Tesco & Co-Op)	£0.4	£13.0	£0.0	£0.0	£0.0	£0.0	£13.4
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE							
Morrisons	£1.1	£0.2	£26.5	£2.6	£0.3	£4.0	£34.7
Tesco	£1.3	£0.7	£31.0	£1.7	£0.0	£4.8	£39.5
Tesco Express	£0.0	£0.3	£1.8	£0.3	£0.3	£2.0	£4.7
Lidl	£1.0	£0.0	£2.9	£0.1	£0.0	£0.8	£4.8
Other	£0.0	£0.0	£4.9	£0.0	£0.0	£0.0	£4.9
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE							
Asda	£6.4	£8.0	£20.1	£24.0	£8.3	£10.5	£77.3
Sainsbury's	£1.4	£2.3	£2.9	£9.0	£3.7	£3.3	£22.5
Marks & Spencer	£1.5	£3.4	£1.6	£4.8	£3.2	£1.7	£16.2
Other	£0.2	£0.6	£0.1	£0.9	£0.1	£0.4	£2.3
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:							
Asda, Crook Log (former Netto)	£0.3	£0.4	£2.5	£4.4	£0.7	£0.9	£9.1
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE							
Sainsbury's	£4.1	£16.6	£5.4	£19.5	£19.7	£8.0	£73.3
Other	£0.0	£0.0	£0.0	£0.3	£1.9	£0.0	£2.2
ZONE 5 - BEXLEY: DISTRICT CENTRE							
All Shops (incl Costcutter)	£0.0	£0.0	£0.0	£0.8	£2.1	£0.0	£2.9
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE							
Morrisons	£0.0	£0.1	£0.4	£0.8	£5.1	£34.3	£40.8
Waitrose	£0.0	£0.0	£0.0	£0.0	£0.0	£5.7	£5.7
Other	£0.0	£0.0	£0.2	£0.0	£0.0	£1.5	£1.6
ZONE 6 - BLACKFEN: DISTRICT CENTRE							
All Shops (incl Tesco Express)	£0.0	£0.0	£2.3	£0.0	£0.0	£12.6	£14.9
NEIGHBOURHOOD CENTRES:							
Zone 1: Abbey Wood	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Zone 1: Belvedere (incl Picardy Street)	£3.1	£1.6	£0.0	£0.0	£0.0	£0.0	£4.8
Zone 2: Erith	£0.0	£1.9	£0.0	£0.0	£0.2	£0.0	£2.1
Zone 3: Welling	£0.3	£0.7	£10.5	£1.2	£0.2	£0.0	£12.9
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)	£1.7	£2.7	£2.2	£11.6	£0.5	£0.6	£19.3
Zone 5: Crayford & Old Bexley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)	£0.0	£0.0	£0.1	£0.0	£0.9	£8.7	£9.8
Zone 6: Foots Cray (incl Lidl)	£0.0	£0.0	£0.0	£0.0	£0.3	£3.8	£4.0
Zone 6: North Cray	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£1.8
ALL OTHER LOCAL STORES	£2.9	£5.1	£0.6	£1.7	£0.9	£6.7	£17.9
BEXLEY BOROUGH - 'RETENTION' LEVEL:	**£60.0**	**£107.1**	**£116.8**	**£89.7**	**£51.1**	**£110.4**	**£535.0**
ALL OTHER STORES/ LOCATIONS OUTSIDE BOROUGH AREA							
Abbey Wood - Lidl (1A Eynsham Drive)	£3.0	£0.2	£0.0	£0.0	£0.0	£0.0	£3.2
Bromley	£0.1	£0.4	£0.0	£0.0	£1.0	£0.4	£2.0
Charlton	£0.5	£0.8	£0.0	£0.0	£0.0	£0.2	£1.5
Dartford	£1.3	£1.3	£0.4	£0.3	£2.6	£2.3	£8.1
Eltham	£0.2	£0.0	£0.4	£0.0	£0.0	£6.6	£7.1
Lakeside	£0.0	£0.0	£0.5	£0.0	£0.0	£0.1	£0.5
Bluewater	£0.7	£0.7	£0.7	£0.1	£0.0	£0.2	£2.4
Greenhithe	£0.1	£0.4	£0.0	£0.0	£0.0	£0.3	£0.8
Greenwich	£0.1	£0.2	£0.1	£0.1	£0.0	£3.4	£3.8
Orpington	£0.0	£0.2	£0.0	£0.0	£0.4	£1.6	£2.2
Tesco - off Edgington Way, nr Sidcup	£0.1	£0.0	£2.4	£0.8	£6.2	£26.1	£35.4
Thamesmead (Morrisons)	£19.4	£0.8	£2.7	£0.4	£0.0	£0.0	£23.3
Thamesmead (Other)	£1.4	£1.1	£0.0	£0.3	£0.0	£0.0	£2.8
Woolwich	£0.6	£2.0	£0.3	£0.0	£0.0	£0.3	£3.2
All Other Stores	£1.2	£0.2	£0.1	£0.9	£5.0	£8.9	£16.2
SUB-TOTAL-OUTSIDE BOROUGH AREA	**£28.5**	**£8.3**	**£7.3**	**£2.6**	**£15.3**	**£50.4**	**£112.4**
TOTAL MARKET SHARE:	**£88.4**	**£115.4**	**£124.2**	**£92.3**	**£66.4**	**£160.8**	**£647.5**

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA ONLY (i.e. excluding 'inflow')

			TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY)					
			2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE: DISTRICT CENTRE								
Co-Op	56-64 Nuxley Road		£1.7	£1.8	£1.9	£2.0	£2.1	£2.3
Budgens	72 Nuxley Road		£0.8	£0.8	£0.8	£0.9	£1.0	£1.0
Other			£0.2	£0.2	£0.2	£0.2	£0.3	£0.3
		Sub-total	**£2.7**	**£2.8**	**£2.9**	**£3.2**	**£3.4**	**£3.6**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road		**Sub-total**	**£18.9**	**£19.1**	**£20.4**	**£21.9**	**£23.4**	**£25.0**
ZONE 2 - ERITH: MAJOR DISTRICT CENTRE								
Morrisons	James Watt Way		£45.3	£45.7	£48.8	£52.4	£55.9	£59.8
Other			£2.2	£2.2	£2.3	£2.5	£2.7	£2.9
		Sub-total	**£47.4**	**£47.9**	**£51.2**	**£54.9**	**£58.6**	**£62.7**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)		**Sub-total**	**£10.1**	**£10.2**	**£10.9**	**£11.7**	**£12.5**	**£13.4**
ZONE 3 -WELLING: MAJOR DISTRICT CENTRE								
Morrisons	High Street		£26.3	£26.6	£28.4	£30.4	£32.4	£34.7
Tesco	Embassy Court		£30.0	£30.3	£32.3	£34.6	£36.9	£39.5
Tesco Express	124 Bellegrove Rd		£3.6	£3.6	£3.9	£4.1	£4.4	£4.7
Lidl	Upper Wickham Lane		£3.6	£3.7	£3.9	£4.2	£4.5	£4.8
Other			£3.8	£3.8	£4.0	£4.3	£4.6	£4.9
		Sub-total	**£67.3**	**£68.0**	**£72.5**	**£77.7**	**£82.9**	**£88.6**
ZONE 4 - BEXLEYHEATH: STRATEGIC CENTRE								
Asda	160 Broadway, Graham Road		£58.6	£59.2	£63.2	£67.7	£72.3	£77.3
Sainsbury's	72 The Broadway		£17.0	£17.2	£18.4	£19.7	£21.0	£22.5
Marks & Spencer	55 The Broadway		£12.3	£12.4	£13.2	£14.2	£15.1	£16.2
Other			£1.8	£1.8	£1.9	£2.0	£2.2	£2.3
		Sub-total	**£89.6**	**£90.6**	**£96.7**	**£103.6**	**£110.6**	**£118.3**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)		**Sub-total**	**£6.9**	**£7.0**	**£7.4**	**£8.0**	**£8.5**	**£9.1**
ZONE 5 - CRAYFORD: MAJOR DISTRICT CENTRE								
Sainsbury's	Stadium Way		£55.5	£56.1	£59.9	£64.2	£68.5	£73.3
Other			£1.7	£1.7	£1.8	£1.9	£2.0	£2.2
		Sub-total	**£57.2**	**£57.8**	**£61.7**	**£66.1**	**£70.6**	**£75.5**
ZONE 5 - BEXLEY: DISTRICT CENTRE								
All Shops (incl Costcutter)		**Sub-total**	**£2.2**	**£2.2**	**£2.4**	**£2.6**	**£2.7**	**£2.9**
ZONE 6 - SIDCUP: MAJOR DISTRICT CENTRE								
Morrisons	1 Jenner Close		£30.9	£31.3	£33.4	£35.8	£38.1	£40.8
Waitrose	High Street		£4.3	£4.4	£4.7	£5.0	£5.3	£5.7
Other			£1.2	£1.3	£1.3	£1.4	£1.5	£1.6
		Sub-total	**£36.5**	**£36.9**	**£39.4**	**£42.2**	**£45.0**	**£48.1**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)		**Sub-total**	**£11.3**	**£11.4**	**£12.2**	**£13.0**	**£13.9**	**£14.9**
NEIGHBOURHOOD CENTRES:								
Zone 1:	Abbey Wood		£0.4	£0.4	£0.4	£0.4	£0.5	£0.5
Zone 1:	Belvedere (incl Picardy Street)		£3.6	£3.7	£3.9	£4.2	£4.5	£4.8
Zone 2:	Erith		£1.6	£1.6	£1.7	£1.8	£1.9	£2.1
Zone 3:	Welling		£9.8	£9.9	£10.5	£11.3	£12.0	£12.9
Zone 4:	Bexleyheath (including Sainsbury's Brampton Road)		£14.6	£14.7	£15.7	£16.9	£18.0	£19.3
Zone 5:	Crayford & Old Bexley		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6:	Sidcup (incl Tesco Express & Co-Op)		£7.4	£7.5	£8.0	£8.6	£9.2	£9.8
Zone 6:	Foots Cray (incl Lidl)		£3.1	£3.1	£3.3	£3.5	£3.8	£4.0
Zone 6:	North Cray		£1.4	£1.4	£1.5	£1.6	£1.7	£1.8
		Sub-total	**£41.8**	**£42.2**	**£45.0**	**£48.3**	**£51.5**	**£55.1**
ALL OTHER LOCAL STORES		**Sub-total**	**£13.6**	**£13.7**	**£14.6**	**£15.7**	**£16.7**	**£17.9**
BEXLEY BOROUGH - 'RETENTION' LEVEL (£m):			**£405.5**	**£409.8**	**£437.3**	**£468.7**	**£500.2**	**£535.0**

Notes: Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

		ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA	TOTAL TURNOVER 2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE								
Co-Op		5%	£1.8	£1.8	£2.0	£2.1	£2.3	£2.4
Budgens		5%	£0.8	£0.8	£0.9	£1.0	£1.0	£1.1
Other		2%	£0.2	£0.2	£0.2	£0.2	£0.3	£0.3
	Sub-total	5%	**£2.9**	**£2.9**	**£3.1**	**£3.3**	**£3.5**	**£3.8**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE:								
Asda, Station Road	**Sub-total**	10.0%	**£21.0**	**£21.2**	**£22.7**	**£24.3**	**£26.0**	**£27.8**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE								
Morrisons		15%	£53.2	£53.8	£57.4	£61.6	£65.8	£70.4
Other		5%	£2.3	£2.3	£2.5	£2.6	£2.8	£3.0
	Sub-total	15%	**£55.5**	**£56.1**	**£59.9**	**£64.2**	**£68.6**	**£73.4**
ZONE 2 - NORTHUMBERLAND HEATH: DISTRICT CENTRE								
All Shops (incl Tesco & Co-Op)	**Sub-total**	2%	**£10.3**	**£10.5**	**£11.2**	**£12.0**	**£12.8**	**£13.7**
ZONE 3- WELLING MAJOR DISTRICT CENTRE								
Morrisons		25%	£35.1	£35.5	£37.8	£40.5	£43.3	£46.2
Tesco		25%	£40.0	£40.4	£43.1	£46.1	£49.2	£52.6
Lidl		10%	£4.0	£4.1	£4.3	£4.7	£5.0	£5.3
Other		5%	£7.7	£7.8	£8.3	£8.9	£9.5	£10.2
	Sub-total	23%	**£86.9**	**£87.8**	**£93.6**	**£100.3**	**£107.0**	**£114.4**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE								
Asda		25%	£78.1	£78.9	£84.2	£90.3	£96.4	£103.1
Sainsbury's		15%	£20.0	£20.3	£21.6	£23.2	£24.8	£26.5
Marks & Spencer		5%	£12.9	£13.0	£13.9	£14.9	£15.9	£17.0
Other		5%	£1.9	£1.9	£2.0	£2.1	£2.3	£2.4
	Sub-total	21%	**£112.9**	**£114.1**	**£121.8**	**£130.5**	**£139.3**	**£149.0**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:								
Asda, Crook Log (former Netto)	**Sub-total**	5%	**£7.2**	**£7.3**	**£7.8**	**£8.4**	**£8.9**	**£9.6**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE								
Sainsbury's		25%	£74.0	£74.8	£79.8	£85.6	£91.3	£97.7
Other		15%	£2.0	£2.0	£2.1	£2.3	£2.4	£2.6
	Sub-total	25%	**£75.9**	**£76.8**	**£81.9**	**£87.8**	**£93.8**	**£100.3**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE								
Morrisons		40%	£51.6	£52.1	£55.6	£59.6	£63.5	£67.9
Waitrose		10%	£4.8	£4.8	£5.2	£5.5	£5.9	£6.3
Other		10%	£1.4	£1.4	£1.5	£1.6	£1.7	£1.8
	Sub-total	37%	**£57.8**	**£58.4**	**£62.3**	**£66.7**	**£71.1**	**£76.0**
ZONE 6 - BLACKFEN: DISTRICT CENTRE								
All Shops (incl Tesco Express)	**Sub-total**	10%	**£12.5**	**£12.7**	**£13.5**	**£14.5**	**£15.4**	**£16.5**
ALL NEIGHBOURHOOD CENTRES								
Zone 1: Abbey Wood		5%	£0.4	£0.4	£0.4	£0.4	£0.5	£0.5
Zone 1: Belvedere (incl Picardy Street)		5%	£3.8	£3.9	£4.1	£4.4	£4.7	£5.0
Zone 2: Erith		5%	£1.6	£1.7	£1.8	£1.9	£2.0	£2.2
Zone 3: Welling		5%	£10.3	£10.4	£11.1	£11.9	£12.7	£13.5
Zone 4: Bexleyheath (including Sainsbury's Brampton Road)		5%	£15.3	£15.5	£16.6	£17.8	£19.0	£20.3
Zone 5: Crayford & Old Bexley		5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Zone 6: Sidcup (incl Tesco Express & Co-Op)		5%	£7.8	£7.9	£8.4	£9.0	£9.6	£10.3
Zone 6: Foots Cray (incl Lidl)		5%	£3.2	£3.3	£3.5	£3.7	£4.0	£4.2
Zone 6: North Cray		5%	£1.4	£1.5	£1.6	£1.7	£1.8	£1.9
	Sub-total		**£44.0**	**£44.4**	**£47.4**	**£50.8**	**£54.3**	**£58.0**
ALL OTHER LOCAL STORES	**Sub-total**	2%	**£13.8**	**£14.0**	**£14.9**	**£16.0**	**£17.1**	**£18.3**
BEXLEY BOROUGH - TOTAL TURNOVER:			**£500.8**	**£506.1**	**£540.0**	**£578.9**	**£617.8**	**£660.7**

Notes: The 'inflow' of expenditure to the Borough's shops and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Gre Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB I

TABLE 15: NEW RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	In centre	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Neighbourhood Centre	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green:	Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre:	In Centre	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall:	In Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL:		**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**

TABLE 16a: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.6%	82.6%	82.6%	82.6%	82.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£405.5	£409.8	£437.3	£468.7	£500.2	£535.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£95.3	£96.3	£102.8	£110.1	£117.5	£125.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£500.8	£506.1	£540.0	£578.9	£617.8	£660.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£500.8	£498.8	£493.8	£496.3	£498.7	£501.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£7.4	£46.3	£82.6	£119.0	£159.5
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	All other	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£66.3**	**£65.5**	**£65.6**	**£66.0**	**£66.0**	**£66.4**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£66.3**	**-£58.1**	**-£19.4**	**£16.7**	**£53.0**	**£93.1**
STEP 11: !	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	-5,303	-4,669	-1,571	1,346	4,256	7,443
	(iii) Assumed Net / Gross Floorspace Ratio: !	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m): !	-7,576	-6,671	-2,244	1,923	6,080	10,633

STEP 1: Total available expenditure derived from Table 3. !

STEP 2: Retention level (%) for the study area at the base year (2015) derived from the revised market shares in Table 7a. Assume constant market shares over the forecast period. !

STEP 3: ! Retention level (£m) over the forecast period derived from Tables 7b, 7-12, assuming constant market shares.

STEP 4 & 5: Estimated 'inflow' (% and £m) from outside the study area is derived from Table 14. The 'inflow' (trade draw) to the Borough's main stores and centres is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, as well as other published retail assessments in support of planning applications, healthchecks and other survey evidence. It takes into account a range of factors, including the likely impact of commuting patterns on available retail

STEP 6: Total forecast 'potential' turnover has been informed by the (survey-derived) revised market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5).

STEP 10: ! For the purpose of this assessment it has been assumed that the convenience goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified stores and floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the available evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new convenience goods floorspace, informed by Experian's latest growth forecasts and current research. For the purpose of this strategic assessment an annual average growth rate ranging from -0.4% to 0.1% has been assumed over the forecast period

STEP 8: ! The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7), assuming 'equilibrium' and constant market shares over the study period.

STEP 9: ! This step makes an allowance for all major convenience goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted) as set out in Table 15. It is assumed that all other commitments will be open and trading by 2018. In the case of Sainsbury's at Abbey Wood, although the store is actually located within the LB Greenwich it has been assumed that approximately 50% of its turnover will be drawn from within the LB Bexley area for the purpose of the retail capacity assessment. It has also been assumed that the new foodstore commitments will achieve 80% of their forecast 'benchmark' turnovers based on the significant new retail floorspace that will open in the next 5 years in the Borough and the increased level of competition and choice that will inevitably occur. It is noted that Tesco are no longer taking forward the planning permission for a superstore in Bexleyheath and it is uncertain whether the site will be delivered for retail.

STEP 10: ! The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)).

STEP 11: ! The 'net' residual expenditure is converted into a net floorspace capacity estimate based on the assumed average sales performance of the main food/grocery retailer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and M&S) of approximately £12,500 per m^2. It is assumed for the purpose of this strategic assessment that other food supermarket retailers (e.g. Co-Op, Budgens, Iceland, etc.) and 'deep discount' food retailers (e.g. Aldi and Lidl) achieve average sales levels of approximately half that assumed for the 'top 6' food operators (i.e. circa £6,000 per sq m). However, the final capacity forecasts will vary depending on the individual operator, as some operators are achieving signficantly

TABLE 16b: LONDON BOROUGH OF BEXLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	82.6%	82.6%	82.6%	82.6%	82.6%	82.6%
STEP 3:	**EXPENDITURE RETAINED BY ALL STORES IN LB BEXLEY (£m):**	£405.5	£409.8	£437.3	£468.7	£500.2	£535.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	£0.2	£0.2	£0.2	£0.2	£0.2	£0.2
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£95.3	£96.3	£102.8	£110.1	£117.5	£125.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£500.8	£506.1	£540.0	£578.9	£617.8	£660.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£500.8	£498.8	£493.8	£496.3	£498.7	£501.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£7.4	£46.3	£82.6	£119.0	£159.5
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Abbey Wood	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	Tesco, Bexleyheath - assume no development in study	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Imperial Gateway	£10.8	£10.7	£10.7	£10.8	£10.8	£10.9
	TOTAL:	**£32.2**	**£31.9**	**£31.9**	**£32.1**	**£32.1**	**£33.3**
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£32.2**	**-£24.5**	**£14.3**	**£50.5**	**£86.9**	**£126.2**
STEP 11: !	**FORECAST CAPACITY FOR NEW SUPERSTORE-FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,580**	**-1,968**	**1,163**	**4,080**	**6,980**	**10,086**
	(iii) Assumed Net / Gross Floorspace Ratio: !	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m): !	-3,685	-2,811	1,661	5,829	9,971	14,409

TABLE 17: FOODSTORE & CONVENIENCE GOODS FLOORSPACE IN MAIN CENTRES & FORECAST 'BENCHMARK' TURNOVERS

			Estimated Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2015	2016	2021	2026	2031
ZONE 1 - BELVEDERE DISTRICT CENTRE									
	Co-Op	56-64 Nuxley Road	338	£7,700	£2.6	£2.6	£2.6	£2.6	£2.6
	Budgens	72 Nuxley Road	291	£5,800	£1.7	£1.7	£1.7	£1.7	£1.7
	TOTAL:		**628**	**£6,821**	**£4.3**	**£4.3**	**£4.2**	**£4.2**	**£4.3**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE:									
	Morrisons	James Watt Way	3,223	£12,800	£41.3	£41.1	£40.7	£40.9	£41.1
	Other		969	£5,000	£4.8	£4.8	£4.8	£4.8	£4.8
	TOTAL:		**4,192**	**£10,997**	**£46.1**	**£45.9**	**£45.5**	**£45.7**	**£45.9**
ZONE 3 -WELLING MAJOR DISTRICT CENTRE									
	Morrisons	High Street	2,969	£12,800	£38.0	£37.9	£37.5	£37.7	£37.9
	Tesco	Embassy Court	2,813	£11,500	£32.3	£32.2	£31.9	£32.1	£32.2
	Lidl	Upper Wickham Lane	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3
	Other		1,746	£5,579	£9.7	£9.7	£9.6	£9.7	£9.7
	TOTAL:		**8,378**	**£9,956**	**£83.4**	**£83.1**	**£82.2**	**£82.7**	**£83.1**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE									
	Asda	160 Broadway, Graham Road	3,063	£13,400	£41.0	£40.9	£40.5	£40.7	£40.9
	Sainsbury's	72 Broadway	1,464	£13,200	£19.3	£19.2	£19.1	£19.2	£19.2
	Other		3,091	£7,536	£23.3	£23.2	£23.0	£23.1	£23.2
	TOTAL:		**7,618**	**£10,982**	**£83.7**	**£83.3**	**£82.5**	**£82.9**	**£83.3**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE									
	Sainsbury's	Stadium Way	5,574	£13,200	£73.6	£73.3	£72.6	£72.9	£73.3
	Other		1,004	£5,795	£5.8	£5.8	£5.7	£5.8	£5.8
	TOTAL:		**6,578**	**£12,070**	**£79.4**	**£79.1**	**£78.3**	**£78.7**	**£79.1**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE									
	Morrisons	1 Jenner Close	1,840	£12,800	£23.6	£23.5	£23.2	£23.3	£23.5
	Waitrose	High Street	531	£12,500	£6.6	£6.6	£6.5	£6.6	£6.6
	Other		1,800	£6,596	£11.9	£11.8	£11.7	£11.8	£11.8
	TOTAL:		**3,640**	**£11,555**	**£42.1**	**£41.9**	**£41.5**	**£41.7**	**£41.9**
OTHER MAJOR SUPERMARKETS & CONVENIENCE STORES IN LB BEXLEY:									
Zone 1:	Former Tesco Express	21 Picardy Street, Belvedere	431	£6,000	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 1:	Asda	Station Road, Belvedere	2,170	£13,400	£29.1	£29.0	£28.7	£28.8	£29.0
Zone 2:	Co-Op	Bexley Road, Northumberland Heath	294	£7,700	£2.3	£2.3	£2.2	£2.2	£2.3
Zone 4:	Co-Op	Falconwood Parade	275	£7,700	£2.1	£2.1	£2.1	£2.1	£2.1
Zone 3:	Co-Op	301-303 Brampton Rd	175	£7,700	£1.3	£1.3	£1.3	£1.3	£1.3
Zone 4:	Asda	13-15 Crook Log, Bexleyheath	523	£13,400	£7.0	£7.0	£6.9	£6.9	£7.0
Zone 4:	Sainsbury's Local	81-87 Avenue Road, Bexleyheath	200	£13,200	£2.6	£2.6	£2.6	£2.6	£2.6
Zone 4:	Sainsbury's Local	287 Brampton Road	313	£13,200	£4.1	£4.1	£4.1	£4.1	£4.1
Zone 4:	Co-Op	4-12 Pickford Lane, Bexleyheath	250	£7,700	£1.9	£1.9	£1.9	£1.9	£1.9
Zone 4:	Co-Op	131-135 Long Lane	350	£7,700	£2.7	£2.7	£2.7	£2.7	£2.7
Zone 4:	Sainsbury's Local	Erith Rd, Barnehurst	300	£13,200	£4.0	£3.9	£3.9	£3.9	£3.9
Zone 6:	Tesco Express	Station Rd, Sidcup N/hood Centre	275	£11,500	£3.2	£3.1	£3.1	£3.1	£3.1
Zone 6:	Lidl	Footscray High Street	850	£3,900	£3.3	£3.3	£3.3	£3.3	£3.3
Zone 6:	Co-Op	Westwood Lane, Blackfen	425	£7,700	£3.3	£3.3	£3.2	£3.2	£3.3
	TOTAL:		**6,831**	**£10,174**	**£69.5**	**£69.2**	**£68.5**	**£68.9**	**£69.2**

Notes: The convenience goods sales areas for stores have been derived from a variety of sources, including: the 2008 joint Greenwich & Bexley Retail Study and the retail assessments prepared in support of various planning applications for new foodstores in LB Bexley.

The base year 'benchmark' average sales densities for individual stores and operators have been informed by the latest published research and a wide range of retail studies. Assume a 'productivity' growth rate for existing floorspace ranging from -0.4% to +0.1% per annum over the forecast period.

Tesco have announced plans to close the Tesco Express Belvedere store (press release on 28th January 2015). Therefore, we have assumed that the existing store will be occupied by a supermarket (e.g. Co-operative) or Symbol retailer (e.g. Nisa, Londis, etc.)

TABLE 18: DIFFERENCE BETWEEN 'POTENTIAL' & 'BENCHMARK' TURNOVERS

				DIFFERENCE (£ million)					
				2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE DISTRICT CENTRE									
	Co-Op	56-64 Nuxley Road		-£0.8	-£0.7	-£0.6	-£0.5	-£0.3	-£0.2
	Budgens	72 Nuxley Road		-£0.9	-£0.8	-£0.8	-£0.7	-£0.7	-£0.6
			Sub-total	**-£1.6**	**-£1.6**	**-£1.4**	**-£1.2**	**-£1.0**	**-£0.8**
ZONE 1 - BELVEDERE: OUT-OF-CENTRE									
	Asda	Station Road	**Sub-total**	**-£8.1**	**-£7.7**	**-£6.0**	**-£4.5**	**-£3.0**	**-£1.3**
ZONE 2 - ERITH MAJOR DISTRICT CENTRE									
	Morrisons	James Watt Way		£12.0	£12.7	£16.8	£20.7	£24.7	£29.1
	Other			-£2.6	-£2.5	-£2.3	-£2.2	-£2.0	-£1.8
			Sub-total	**£9.4**	**£10.2**	**£14.5**	**£18.6**	**£22.7**	**£27.2**
ZONE 3- WELLING MAJOR DISTRICT CENTRE									
	Morrisons	High Street		-£2.9	-£2.4	£0.4	£2.9	£5.4	£8.2
	Tesco	Embassy Court		£7.6	£8.2	£11.2	£14.1	£17.0	£20.2
	Lidl	Upper Wickham Lane		£0.7	£0.8	£1.1	£1.4	£1.7	£2.0
	Other			-£2.0	-£1.9	-£1.3	-£0.7	-£0.2	£0.4
			Sub-total	**£3.5**	**£4.7**	**£11.4**	**£17.6**	**£23.9**	**£30.9**
ZONE 4 - BEXLEYHEATH STRATEGIC CENTRE									
	Asda	160 Broadway, Graham Road		£37.0	£38.0	£43.7	£49.6	£55.5	£62.0
	Sainsbury's	72 Broadway		£0.7	£1.0	£2.6	£4.0	£5.5	£7.1
	Other			-£10.4	-£10.2	-£9.1	-£8.2	-£7.3	-£6.3
			Sub-total	**£27.4**	**£28.9**	**£37.3**	**£45.5**	**£53.7**	**£62.9**
ZONE 4 - BEXLEYHEATH: OUT-OF-CENTRE:									
	Asda, Crook Log (former Netto)		**Sub-total**	**£0.2**	**£0.3**	**£0.9**	**£1.4**	**£2.0**	**£2.6**
ZONE 5 - CRAYFORD MAJOR DISTRICT CENTRE									
	Sainsbury's			£0.4	£1.5	£7.3	£12.7	£18.1	£24.1
	Other			-£3.9	-£3.8	-£3.6	-£3.5	-£3.4	-£3.2
			Sub-total	**-£3.4**	**-£2.3**	**£3.6**	**£9.2**	**£14.7**	**£20.8**
ZONE 6 - SIDCUP MAJOR DISTRICT CENTRE									
	Morrisons			£28.0	£28.7	£32.4	£36.2	£40.1	£44.3
	Waitrose			-£1.8	-£1.8	-£1.4	-£1.0	-£0.7	-£0.3
	Other			-£10.5	-£10.4	-£10.2	-£10.2	-£10.1	-£10.1
			Sub-total	**£15.7**	**£16.5**	**£20.8**	**£25.0**	**£29.3**	**£33.9**
TOTAL:				**£43.0**	**£49.0**	**£81.0**	**£111.6**	**£142.2**	**£176.2**

Notes: The difference in turnover levels identified by Table 14 and Table 17.

TABLE 19a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	19.7%	19.7%	19.7%	19.7%	19.7%	19.7%
STEP 3:	**'RETENTION' LEVEL (£m):**	£96.5	£97.5	£104.1	£111.6	£119.1	£127.4
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	20%	20%	20%	20%	20%	20%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.6	£23.9	£25.5	£27.3	£29.2	£31.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£120.1	£121.4	£129.6	£138.9	£148.3	£158.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£120.1	£119.6	£118.5	£119.0	£119.6	£120.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.8	£11.1	£19.9	£28.6	£38.4
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Tesco, Bexleyheath	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£37.0**	**-£34.8**	**-£25.5**	**-£16.9**	**-£8.2**	**£1.4**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-2,959**	**-2,793**	**-2,068**	**-1,366**	**-659**	**108**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,227	-3,990	-2,954	-1,952	-941	155

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 19b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO STORE COMMITMENT

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	19.7%	19.7%	19.7%	19.7%	19.7%	19.7%
STEP 3:	**'RETENTION' LEVEL (£m):**	£96.5	£97.5	£104.1	£111.6	£119.1	£127.4
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19.7%	19.7%	19.7%	19.7%	19.7%	19.7%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£23.6	£23.9	£25.5	£27.3	£29.2	£31.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£120.1	£121.4	£129.6	£138.9	£148.3	£158.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£120.1	£119.6	£118.5	£119.0	£119.6	£120.2
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.8	£11.1	£19.9	£28.6	£38.4
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Lidl, The Broadway	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£2.9**	**-£1.1**	**£8.2**	**£16.9**	**£25.7**	**£35.4**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) Net Floorspace Capacity (sq m):	**-236**	**-91**	**666**	**1,368**	**2,064**	**2,832**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-337	-131	951	1,954	2,949	4,045

Notes: Turnover figures and forecasts include Asda at Crook Log.

TABLE 20: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	11.6%	11.6%	11.6%	11.7%	11.7%	11.7%
STEP 3:	**'RETENTION' LEVEL (£m):**	£57.15	£57.77	£61.65	£66.10	£70.55	£75.48
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.8	£19.0	£20.3	£21.7	£23.2	£24.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£75.9	£76.8	£81.9	£87.8	£93.8	£100.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£75.9	£75.6	£74.9	£75.3	£75.6	£76.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£7.0	£12.6	£18.1	£24.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.1**	**£7.0**	**£12.6**	**£18.1**	**£24.3**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**90**	**571**	**1,015**	**1,455**	**1,940**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	128	815	1,449	2,078	2,771

TABLE 21: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	'RETENTION' LEVEL (%):	9.7%	9.7%	9.7%	9.7%	9.7%	9.7%
STEP 3:	'RETENTION' LEVEL (£m):	£47.4	£47.9	£51.2	£54.9	£58.6	£62.7
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	15%	15%	15%	15%	15%	15%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£8.1	£8.2	£8.7	£9.4	£10.0	£10.7
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£55.5	£56.1	£59.9	£64.2	£68.6	£73.4
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£55.5	£55.3	£54.8	£55.0	£55.3	£55.6
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£0.8	£5.2	£9.2	£13.3	£17.8
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):						
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**£0.0**	**£0.8**	**£5.2**	**£9.2**	**£13.3**	**£17.8**
STEP 11:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**66**	**418**	**743**	**1,066**	**1,422**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	94	597	1,062	1,523	2,031

TABLE 22: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	'RETENTION' LEVEL (%):	13.7%	13.7%	13.7%	13.7%	13.7%	13.7%
STEP 3:	'RETENTION' LEVEL (£m):	£67.30	£68.01	£72.52	£77.68	£82.87	£88.61
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	23%	23%	23%	23%	23%	23%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£19.6	£19.8	£21.1	£22.6	£24.1	£25.8
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£86.9	£87.8	£93.6	£100.3	£107.0	£114.4
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£86.9	£86.5	£85.7	£86.1	£86.5	£86.9
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£1.3	£8.0	£14.2	£20.4	£27.4
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):						
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**£0.0**	**£1.3**	**£8.0**	**£14.2**	**£20.4**	**£27.4**
STEP 11:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**102**	**645**	**1,145**	**1,643**	**2,192**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	145	922	1,636	2,347	3,131

TABLE 23: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	'RETENTION' LEVEL (%):	7.4%	7.4%	7.4%	7.4%	7.4%	7.4%
STEP 3:	'RETENTION' LEVEL (£m):	£36.5	£36.9	£39.4	£42.2	£45.0	£48.1
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	37%	37%	37%	37%	37%	37%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£21.2	£21.5	£22.9	£24.5	£26.2	£28.0
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£57.8	£58.4	£62.3	£66.7	£71.1	£76.0
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£57.8	£57.5	£56.9	£57.2	£57.5	£57.8
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£0.8	£5.3	£9.5	£13.6	£18.2
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):						
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**£0.0**	**£0.8**	**£5.3**	**£9.5**	**£13.6**	**£18.2**
STEP 11:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**68**	**431**	**766**	**1,095**	**1,458**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	97	616	1,094	1,564	2,082

TABLE 24: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

ASSUME 'EQUILIBRIUM' AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£647.5
STEP 2:	**'RETENTION' LEVEL (%):**	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%
STEP 3:	**'RETENTION' LEVEL (£m):**	£25.6	£25.9	£27.7	£29.7	£31.7	£33.9
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	9%	9%	9%	9%	9%	9%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£2.4	£2.5	£2.6	£2.8	£3.0	£3.2
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£28.1	£28.4	£30.3	£32.5	£34.7	£37.1
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£28.1	£27.9	£27.7	£27.8	£27.9	£28.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£0.4	£2.6	£4.7	£6.7	£9.0
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	- Sainsbury's (Cross Quarter, Abbey Wood):	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
	- Imperial Gateway (Norman Park, Picardy Manorway):	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
	- Southmere Village, Tavy Bridge, Thamesmead	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£29.3**	**-£28.5**	**-£26.4**	**-£24.5**	**-£22.4**	**-£20.3**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**-2,344**	**-2,292**	**-2,140**	**-1,975**	**-1,802**	**-1,622**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-3,349	-3,274	-3,058	-2,821	-2,574	-2,317

TABLE 25: REST OF STUDY AREA: RESIDUAL FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£490.7	£496.0	£529.2	£567.3	£605.4	£0.2
STEP 2:	**'RETENTION' LEVEL FOR STUDY AREA (%):**	83%	83%	83%	83%	83%	83%
STEP 3:	**'RETENTION' LEVEL FOR STUDY AREA (£m):**	£75.0	£75.8	£80.8	£86.7	£92.5	£98.9
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	2%	2%	2%	2%	2%	2%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£1.5	£1.5	£1.6	£1.8	£1.9	£2.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£76.5	£77.3	£82.5	£88.4	£94.3	£100.9
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£76.5	£76.2	£75.4	£75.8	£76.2	£76.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.1	£7.1	£12.6	£18.2	£24.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.1**	**£7.1**	**£12.6**	**£18.2**	**£24.3**
STEP 11:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,450	£12,326	£12,388	£12,450	£12,512
	(ii) **Net Floorspace Capacity (sq m):**	**0**	**90**	**573**	**1,019**	**1,459**	**1,945**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	129	819	1,455	2,084	2,779

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Er

APPENDIX 5A: COMPARISON CAPACITY ASSESSMENT UPDATE – LOWER POPULATION GROWTH SCENARIO

COMPARISON GOODS CAPACITY - SCENARIO PH3 (LOWER POPULATION GROWTH)

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	37,130	37,580	37,487	52,434	66,780	66,098
ZONE 2	Erith	45,450	45,476	48,554	53,682	55,892	55,726
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,573	25,432	25,785	25,645
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350
STUDY AREA TOTAL:		**236,296**	**237,371**	**240,196**	**262,609**	**280,919**	**279,567**

Source: London Borough of Bexley (March 2015)
Notes: Scenario PH3 population projections are based on planned housing delivery by ward over the period 2011 to 2036.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£2,500	£2,774	£3,131	£3,683	£4,353	£5,120
ZONE 2	Erith	£2,635	£2,924	£3,300	£3,882	£4,588	£5,397
ZONE 3	Welling	£3,096	£3,436	£3,878	£4,561	£5,391	£6,341
ZONE 4	Bexleyheath	£3,120	£3,462	£3,908	£4,596	£5,432	£6,390
ZONE 5	Crayford/Old Bexley	£3,191	£3,541	£3,997	£4,701	£5,556	£6,535
ZONE 6	Sidcup	£3,203	£3,555	£4,013	£4,720	£5,578	£6,561

Source: Average spend per capita estimates for each zone are derived from Experian *'2015 - Retail Area Planner'* Reports (2013 prices)
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian *Retail Planner Briefing Note 12.1 (* October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL FORECAST GROWTH, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£92.8	£104.3	£117.4	£193.1	£290.7	£338.4	108.1%	264.6%
ZONE 2	Erith	£119.8	£133.0	£160.3	£208.4	£256.4	£300.7	74.0%	151.1%
ZONE 3	Welling	£134.8	£149.5	£168.0	£199.4	£236.2	£275.6	47.9%	104.5%
ZONE 4	Bexleyheath	£99.8	£110.9	£125.1	£151.0	£184.6	£219.0	51.3%	119.4%
ZONE 5	Crayford/Old Bexley	£76.1	£86.3	£98.2	£119.6	£143.3	£167.6	57.1%	120.2%
ZONE 6	Sidcup	£174.0	£193.4	£217.7	£257.2	£304.9	£356.6	47.8%	104.9%
TOTAL		**£697.3**	**£777.3**	**£886.6**	**£1,128.7**	**£1,416.1**	**£1,658.1**	**61.9%**	**137.8%**

Source: Expenditure calculated from Tables 1 & 2.

TABLE 4: ALL COMPARISON GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
			Belvedere	Erith	Welling	Bexleyheath	Crayford/ Old Bexley	Sidcup	
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.6%	1.4%	0.2%	0.3%	0.0%	0.0%	0.7%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		2.6%	5.2%	0.9%	0.6%	3.2%	0.1%	1.9%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.7%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.1%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		34.4%	30.4%	26.8%	37.4%	20.8%	14.5%	26.2%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		1.2%	3.7%	0.9%	2.8%	4.4%	2.6%	2.5%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.8%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	16.2%	14.1%	12.6%	12.9%	3.2%	0.5%	9.3%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Tower Retail Park	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Crittals Corner	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**60.7%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.6%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.5%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.3%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.0%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.0%
Thamesmead			5.6%	0.4%	0.5%	0.1%	0.0%	0.1%	0.9%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**39.3%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.4%**
	TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 5: 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	£92.8	£119.8	£134.8	£99.8	£76.1	£174.0	£697.3
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£2.4	£1.7	£0.2	£0.3	£0.0	£0.0	£4.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£2.4	£6.3	£1.2	£0.6	£2.4	£0.1	£13.0
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.2	£3.7	£0.3	£0.1	£0.1	£0.1	£4.5
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£0.6	£1.0	£10.8	£1.1	£0.1	£1.3	£14.9
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£32.0	£36.4	£36.1	£37.4	£15.8	£25.3	£183.0
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.1	£4.4	£1.2	£2.8	£3.4	£4.6	£17.5
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.4	£0.6	£1.4	£0.2	£1.4	£15.2	£19.2
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£15.0	£16.9	£17.0	£12.8	£2.4	£0.9	£65.0
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.4	£4.4	£2.8	£4.6	£9.3	£29.3
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.2	£0.6	£5.0	£10.3	£18.6
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.2
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£56.4**	**£78.0**	**£74.8**	**£59.6**	**£35.9**	**£69.4**	**£374.1**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.2	£17.6
Charlton			£2.2	£0.5	£2.8	£0.1	£0.1	£1.1	£6.8
Dartford			£1.1	£3.5	£1.0	£5.7	£9.6	£1.9	£22.8
Eltham			£0.0	£0.0	£3.2	£0.7	£0.8	£7.0	£11.7
Lakeside			£2.1	£2.1	£4.0	£2.3	£1.5	£3.2	£15.2
Bluewater			£14.9	£30.9	£38.7	£24.6	£23.0	£42.5	£174.5
Greenhithe			£1.4	£0.1	£1.8	£0.2	£0.0	£2.4	£6.0
Orpington			£0.9	£1.0	£1.8	£1.6	£2.0	£27.9	£35.2
Thamesmead			£5.2	£0.4	£0.6	£0.1	£0.0	£0.2	£6.6
West End			£0.6	£1.2	£2.2	£0.0	£1.0	£0.9	£5.9
Woolwich			£2.6	£1.2	£0.0	£0.0	£0.0	£0.0	£3.8
All Other Centres/ Stores			£5.0	£0.7	£3.4	£2.6	£1.3	£4.3	£17.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£36.5**	**£41.8**	**£60.0**	**£40.2**	**£40.2**	**£104.6**	**£323.2**
	TOTAL MARKET SHARE:		**£92.8**	**£119.8**	**£134.8**	**£99.8**	**£76.1**	**£174.0**	**£697.3**

TABLE 6: NEW COMPARISON RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	Turnover 2015	Estimated Trade Draw		
				Zone 1	Zone 2	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%
Asda Superstore, Station Road, Belevedere	1205	£9,201	£11.1	50%	15%	35%

Notes: Elsewhere equates to trade draw from outside of the Borough

TABLE 7a: REVISED 2015 MARKET SHARE ANALYSIS (%) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELEVEDERE AND WAITROSE SIDCUP

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.0%	1.4%	0.2%	0.3%	0.0%	0.0%	0.6%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		1.1%	4.3%	0.9%	0.6%	3.2%	0.1%	1.5%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.7%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.1%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		33.2%	30.0%	26.8%	37.4%	20.8%	14.5%	26.0%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		0.6%	3.7%	0.9%	2.8%	4.4%	2.6%	2.4%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.8%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	22.2%	15.5%	12.6%	12.9%	3.2%	0.5%	10.4%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Crittals Corner	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Tower Retail Park	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**62.8%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.9%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.5%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.3%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.0%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.0%
Thamesmead			3.5%	0.4%	0.5%	0.1%	0.0%	0.1%	0.7%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**37.2%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.1%**
TOTAL MARKET SHARE:			**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELEVEDERE

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		£92.8	£119.8	£134.8	£99.8	£76.1	£174.0	£697.3
ZONE 1:	**BELVEDERE DISTRICT CENTRE:**		£1.8	£1.7	£0.2	£0.3	£0.0	£0.0	£4.0
ZONE 2:	**ERITH MAJOR DISTRICT CENTRE:**		£1.0	£5.1	£1.2	£0.6	£2.4	£0.1	£10.4
ZONE 2:	**NORTHUMBERLAND HEATH DISTRICT CENTRE:**		£0.2	£3.7	£0.3	£0.1	£0.1	£0.1	£4.5
ZONE 3:	**WELLING MAJOR DISTRICT CENTRE:**		£0.6	£1.0	£10.8	£1.1	£0.1	£1.3	£14.9
ZONE 4:	**BEXLEYHEATH STRATEGIC CENTRE:**		£30.9	£35.9	£36.1	£37.4	£15.8	£25.3	£181.4
ZONE 5:	**CRAYFORD MAJOR DISTRICT CENTRE:**		£0.6	£4.4	£1.2	£2.8	£3.4	£4.6	£17.0
ZONE 5:	**BEXLEY VILLAGE DISTRICT CENTRE:**		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP MAJOR DISTRICT CENTRE:**		£0.4	£0.6	£1.4	£0.2	£1.4	£15.2	£19.2
ZONE 6:	BLACKFEN DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£20.6	£18.5	£17.0	£12.8	£2.4	£0.9	£72.2
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.4	£4.4	£2.8	£4.6	£9.3	£29.3
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.2	£0.6	£5.0	£10.3	£18.6
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.2
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£58.3**	**£78.0**	**£74.8**	**£59.6**	**£35.9**	**£69.4**	**£376.0**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.2	£17.6
Charlton			£2.2	£0.5	£2.8	£0.1	£0.1	£1.1	£6.8
Dartford			£1.1	£3.5	£1.0	£5.7	£9.6	£1.9	£22.8
Eltham			£0.0	£0.0	£3.2	£0.7	£0.8	£7.0	£11.7
Lakeside			£2.1	£2.1	£4.0	£2.3	£1.5	£3.2	£15.2
Bluewater			£14.9	£30.9	£38.7	£24.6	£23.0	£42.5	£174.5
Greenhithe			£1.4	£0.1	£1.8	£0.2	£0.0	£2.4	£6.0
Orpington			£0.9	£1.0	£1.8	£1.6	£2.0	£27.9	£35.2
Thamesmead			£3.3	£0.4	£0.6	£0.1	£0.0	£0.2	£4.7
West End			£0.6	£1.2	£2.2	£0.0	£1.0	£0.9	£5.9
Woolwich			£2.6	£1.2	£0.0	£0.0	£0.0	£0.0	£3.8
All Other Centres/ Stores			£5.0	£0.7	£3.4	£2.6	£1.3	£4.3	£17.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£34.5**	**£41.8**	**£60.0**	**£40.2**	**£40.2**	**£104.6**	**£321.3**
	TOTAL MARKET SHARE:		**£92.8**	**£119.8**	**£134.8**	**£99.8**	**£76.1**	**£174.0**	**£697.3**

TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		£104.3	£133.0	£149.5	£110.9	£86.3	£193.4	£777.3
ZONE 1:	**BELVEDERE** DISTRICT CENTRE**:**		£2.1	£1.8	£0.3	£0.3	£0.0	£0.0	£4.5
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE**:**		£1.1	£5.7	£1.3	£0.7	£2.7	£0.1	£11.7
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE**:**		£0.2	£4.1	£0.3	£0.2	£0.1	£0.1	£5.0
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE**:**		£0.6	£1.1	£12.0	£1.2	£0.1	£1.5	£16.5
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE**:**		£34.7	£39.9	£40.0	£41.5	£17.9	£28.1	£202.2
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE**:**		£0.6	£4.9	£1.4	£3.1	£3.8	£5.1	£19.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE**:**		£0.0	£0.1	£0.0	£0.2	£0.9	£0.0	£1.2
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE**:**		£0.4	£0.7	£1.5	£0.2	£1.6	£16.9	£21.4
ZONE 6:	**BLACKFEN** DISTRICT CENTRE**:**		£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.6
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£23.1	£20.6	£18.8	£14.3	£2.7	£0.9	£80.5
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 5:	**CRAYFORD**	Tower Retail Park	£2.1	£7.1	£4.9	£3.1	£5.2	£10.3	£32.7
ZONE 6:	**SIDCUP**	Crittals Corner	£0.3	£0.2	£2.5	£0.7	£5.7	£11.4	£20.8
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£65.5**	**£86.6**	**£82.9**	**£66.2**	**£40.8**	**£77.2**	**£419.2**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.7	£0.1	£0.5	£2.6	£0.9	£14.7	£19.5
Charlton			£2.5	£0.5	£3.1	£0.1	£0.2	£1.2	£7.6
Dartford			£1.3	£3.9	£1.1	£6.3	£10.9	£2.1	£25.6
Eltham			£0.0	£0.0	£3.6	£0.8	£0.9	£7.7	£13.0
Lakeside			£2.3	£2.4	£4.4	£2.5	£1.7	£3.5	£16.9
Bluewater			£16.7	£34.3	£42.9	£27.3	£26.1	£47.2	£194.5
Greenhithe			£1.5	£0.1	£2.0	£0.2	£0.0	£2.7	£6.7
Orpington			£1.0	£1.1	£2.0	£1.7	£2.3	£31.0	£39.1
Thamesmead			£3.7	£0.5	£0.7	£0.1	£0.0	£0.3	£5.2
West End			£0.6	£1.3	£2.4	£0.0	£1.1	£1.1	£6.6
Woolwich			£2.9	£1.3	£0.0	£0.0	£0.0	£0.0	£4.3
All Other Centres/ Stores			£5.6	£0.8	£3.8	£2.9	£1.5	£4.8	£19.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£38.8**	**£46.4**	**£66.5**	**£44.7**	**£45.6**	**£116.3**	**£358.2**
	TOTAL MARKET SHARE:		**£104.3**	**£133.0**	**£149.5**	**£110.9**	**£86.3**	**£193.4**	**£777.3**

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£117.4**	**£160.3**	**£168.0**	**£125.1**	**£98.2**	**£217.7**	**£886.6**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE**:**		£2.3	£2.2	£0.3	£0.3	£0.0	£0.0	£5.2
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE**:**		£1.3	£6.9	£1.5	£0.8	£3.1	£0.1	£13.6
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE**:**		£0.3	£5.0	£0.4	£0.2	£0.1	£0.1	£6.0
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE**:**		£0.7	£1.4	£13.4	£1.4	£0.2	£1.6	£18.7
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE**:**		£39.0	£48.1	£45.0	£46.8	£20.4	£31.7	£231.0
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE**:**		£0.7	£5.9	£1.5	£3.5	£4.4	£5.8	£21.8
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE**:**		£0.0	£0.1	£0.0	£0.3	£1.0	£0.0	£1.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE**:**		£0.5	£0.8	£1.7	£0.3	£1.8	£19.0	£24.1
ZONE 6:	**BLACKFEN** DISTRICT CENTRE**:**		£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£2.0
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.6
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.5	£0.0	£0.4	£0.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£26.0	£24.8	£21.1	£16.1	£3.1	£1.1	£92.2
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 5:	**CRAYFORD**	Tower Retail Park	£2.3	£8.6	£5.5	£3.5	£5.9	£11.6	£37.5
ZONE 6:	**SIDCUP**	Crittals Corner	£0.4	£0.2	£2.8	£0.8	£6.4	£12.8	£23.4
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£73.7**	**£104.4**	**£93.2**	**£74.7**	**£46.4**	**£86.8**	**£479.2**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.7	£0.2	£0.6	£3.0	£1.0	£16.5	£22.0
Charlton			£2.8	£0.6	£3.5	£0.1	£0.2	£1.3	£8.5
Dartford			£1.4	£4.7	£1.2	£7.1	£12.4	£2.4	£29.2
Eltham			£0.0	£0.0	£4.0	£0.9	£1.0	£8.7	£14.6
Lakeside			£2.6	£2.9	£5.0	£2.8	£2.0	£4.0	£19.2
Bluewater			£18.8	£41.3	£48.2	£30.8	£29.6	£53.2	£221.9
Greenhithe			£1.7	£0.2	£2.3	£0.3	£0.1	£3.0	£7.6
Orpington			£1.1	£1.4	£2.2	£2.0	£2.6	£34.9	£44.2
Thamesmead			£4.1	£0.6	£0.8	£0.2	£0.0	£0.3	£5.9
West End			£0.7	£1.6	£2.7	£0.0	£1.3	£1.2	£7.5
Woolwich			£3.3	£1.6	£0.1	£0.0	£0.0	£0.0	£5.0
All Other Centres/ Stores			£6.3	£1.0	£4.2	£3.2	£1.7	£5.4	£21.7
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£43.6**	**£55.9**	**£74.8**	**£50.4**	**£51.8**	**£130.8**	**£407.4**
	TOTAL MARKET SHARE:		**£117.4**	**£160.3**	**£168.0**	**£125.1**	**£98.2**	**£217.7**	**£886.6**

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£193.1**	**£208.4**	**£199.4**	**£151.0**	**£119.6**	**£257.2**	**£1,128.7**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE**:**		£3.8	£2.9	£0.3	£0.4	£0.0	£0.0	£7.5
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE**:**		£2.1	£8.9	£1.8	£0.9	£3.8	£0.1	£17.6
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE**:**		£0.4	£6.5	£0.4	£0.2	£0.1	£0.2	£7.8
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE**:**		£1.2	£1.8	£16.0	£1.7	£0.2	£1.9	£22.7
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE**:**		£64.2	£62.5	£53.4	£56.6	£24.8	£37.4	£298.9
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE**:**		£1.2	£7.6	£1.8	£4.3	£5.3	£6.8	£27.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE**:**		£0.0	£0.1	£0.0	£0.3	£1.2	£0.0	£1.7
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE**:**		£0.8	£1.1	£2.0	£0.3	£2.2	£22.4	£28.9
ZONE 6:	**BLACKFEN** DISTRICT CENTRE**:**		£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£2.3
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.6	£0.7
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.6	£0.0	£0.5	£1.0
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£42.8	£32.2	£25.1	£19.4	£3.8	£1.3	£124.7
ZONE 2:	**ERITH**	Madford Retail Park	£0.2	£0.5	£0.0	£0.0	£0.0	£0.1	£0.7
ZONE 5:	**CRAYFORD**	Tower Retail Park	£3.8	£11.1	£6.5	£4.3	£7.2	£13.8	£46.7
ZONE 6:	**SIDCUP**	Crittals Corner	£0.6	£0.3	£3.3	£1.0	£7.8	£15.2	£28.2
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.1	£0.0	£0.1	£0.4
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£121.3**	**£135.7**	**£110.7**	**£90.2**	**£56.5**	**£102.6**	**£616.9**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.2	£0.2	£0.7	£3.6	£1.3	£19.5	£26.5
Charlton			£4.6	£0.8	£4.2	£0.1	£0.2	£1.6	£11.5
Dartford			£2.4	£6.1	£1.4	£8.6	£15.1	£2.8	£36.4
Eltham			£0.0	£0.0	£4.8	£1.1	£1.2	£10.3	£17.3
Lakeside			£4.3	£3.7	£5.9	£3.4	£2.4	£4.7	£24.5
Bluewater			£31.0	£53.7	£57.2	£37.2	£36.1	£62.8	£278.0
Greenhithe			£2.8	£0.2	£2.7	£0.3	£0.1	£3.6	£9.8
Orpington			£1.8	£1.8	£2.7	£2.4	£3.2	£41.2	£53.0
Thamesmead			£6.8	£0.7	£0.9	£0.2	£0.0	£0.4	£9.0
West End			£1.2	£2.1	£3.2	£0.0	£1.6	£1.4	£9.5
Woolwich			£5.4	£2.1	£0.1	£0.0	£0.0	£0.0	£7.6
All Other Centres/ Stores			£10.3	£1.3	£5.0	£3.9	£2.0	£6.3	£28.8
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£71.8**	**£72.7**	**£88.7**	**£60.9**	**£63.1**	**£154.6**	**£511.8**
	TOTAL MARKET SHARE:		**£193.1**	**£208.4**	**£199.4**	**£151.0**	**£119.6**	**£257.2**	**£1,128.7**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£290.7**	**£256.4**	**£236.2**	**£184.6**	**£143.3**	**£304.9**	**£1,416.1**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£5.8	£3.6	£0.4	£0.5	£0.0	£0.0	£10.3
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£3.1	£11.0	£2.1	£1.2	£4.5	£0.2	£22.0
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.7	£8.0	£0.5	£0.3	£0.1	£0.2	£9.7
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£1.8	£2.2	£18.9	£2.0	£0.2	£2.3	£27.4
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£96.6	£76.9	£63.3	£69.1	£29.7	£44.4	£380.1
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.8	£9.4	£2.2	£5.2	£6.4	£8.1	£33.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.4	£1.5	£0.0	£2.0
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.2	£1.3	£2.4	£0.4	£2.7	£26.6	£34.6
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£2.7	£2.7
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.7	£0.9
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.7	£0.0	£0.5	£1.2
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£64.5	£39.7	£29.7	£23.8	£4.5	£1.5	£163.7
ZONE 2:	**ERITH**	Madford Retail Park	£0.3	£0.6	£0.0	£0.0	£0.0	£0.1	£1.0
ZONE 5:	**CRAYFORD**	Tower Retail Park	£5.8	£13.7	£7.7	£5.2	£8.6	£16.3	£57.3
ZONE 6:	**SIDCUP**	Crittals Corner	£0.9	£0.4	£3.9	£1.2	£9.4	£18.0	£33.7
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.5
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£182.6**	**£167.0**	**£131.1**	**£110.2**	**£67.6**	**£121.6**	**£780.2**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.8	£0.2	£0.8	£4.4	£1.5	£23.1	£32.0
Charlton			£7.0	£1.0	£4.9	£0.2	£0.3	£1.8	£15.2
Dartford			£3.5	£7.5	£1.7	£10.5	£18.1	£3.3	£44.7
Eltham			£0.0	£0.0	£5.7	£1.4	£1.4	£12.2	£20.6
Lakeside			£6.5	£4.6	£7.0	£4.2	£2.9	£5.5	£30.7
Bluewater			£46.6	£66.1	£67.7	£45.5	£43.2	£74.5	£343.7
Greenhithe			£4.3	£0.3	£3.2	£0.4	£0.1	£4.3	£12.5
Orpington			£2.7	£2.2	£3.1	£2.9	£3.8	£48.9	£63.6
Thamesmead			£10.2	£0.9	£1.1	£0.2	£0.0	£0.4	£12.8
West End			£1.8	£2.5	£3.8	£0.0	£1.9	£1.7	£11.7
Woolwich			£8.1	£2.6	£0.1	£0.0	£0.0	£0.0	£10.8
All Other Centres/ Stores			£15.5	£1.5	£5.9	£4.8	£2.4	£7.5	£37.7
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£108.1**	**£89.4**	**£105.1**	**£74.4**	**£75.6**	**£183.3**	**£636.0**
	TOTAL MARKET SHARE:		**£290.7**	**£256.4**	**£236.2**	**£184.6**	**£143.3**	**£304.9**	**£1,416.1**
			£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£338.4**	**£300.7**	**£275.6**	**£219.0**	**£167.6**	**£356.6**	**£1,658.1**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£6.7	£4.2	£0.5	£0.6	£0.0	£0.1	£12.0
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£3.6	£12.9	£2.4	£1.4	£5.3	£0.2	£25.8
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.8	£9.3	£0.6	£0.3	£0.2	£0.2	£11.4
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£2.1	£2.6	£22.0	£2.4	£0.3	£2.7	£32.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£112.5	£90.2	£73.8	£82.0	£34.8	£51.9	£445.2
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£2.1	£11.0	£2.5	£6.2	£7.4	£9.4	£38.7
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.5	£1.7	£0.0	£2.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.4	£1.6	£2.8	£0.5	£3.1	£31.1	£40.5
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£3.1	£3.2
ZONE 1:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.2	£0.0	£0.9	£1.0
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.8	£0.0	£0.6	£1.4
ZONE 1:									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£75.1	£46.5	£34.7	£28.2	£5.3	£1.7	£191.5
ZONE 2:	**ERITH**	Madford Retail Park	£0.4	£0.7	£0.0	£0.0	£0.0	£0.1	£1.1
ZONE 5:	**CRAYFORD**	Tower Retail Park	£6.7	£16.1	£9.0	£6.2	£10.1	£19.1	£67.1
ZONE 6:	**SIDCUP**	Crittals Corner	£1.1	£0.4	£4.5	£1.4	£11.0	£21.0	£39.5
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.6
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£212.6**	**£195.8**	**£153.0**	**£130.8**	**£79.1**	**£142.3**	**£913.6**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£2.1	£0.3	£1.0	£5.2	£1.8	£27.1	£37.4
Charlton			£8.1	£1.2	£5.8	£0.2	£0.3	£2.2	£17.7
Dartford			£4.1	£8.8	£2.0	£12.5	£21.1	£3.9	£52.4
Eltham			£0.0	£0.0	£6.6	£1.6	£1.7	£14.3	£24.1
Lakeside			£7.6	£5.4	£8.1	£5.0	£3.4	£6.5	£35.9
Bluewater			£54.3	£77.5	£79.1	£54.0	£50.6	£87.1	£402.5
Greenhithe			£5.0	£0.3	£3.8	£0.5	£0.1	£5.0	£14.6
Orpington			£3.2	£2.6	£3.7	£3.4	£4.5	£57.2	£74.5
Thamesmead			£11.9	£1.1	£1.2	£0.3	£0.0	£0.5	£15.0
West End			£2.0	£3.0	£4.5	£0.0	£2.2	£1.9	£13.7
Woolwich			£9.4	£3.0	£0.1	£0.0	£0.0	£0.0	£12.6
All Other Centres/ Stores			£18.1	£1.8	£6.9	£5.6	£2.8	£8.8	£44.1
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£125.8**	**£104.9**	**£122.7**	**£88.3**	**£88.5**	**£214.3**	**£744.5**
	TOTAL MARKET SHARE:		**£338.4**	**£300.7**	**£275.6**	**£219.0**	**£167.6**	**£356.6**	**£1,658.1**

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA (i.e. excluding 'inflow')

			TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY) £m					
			2015	**2016**	**2021**	**2026**	**2031**	
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£4.0	£4.5	£5.2	£7.5	£10.3	£12.0
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£10.4	£11.7	£13.6	£17.6	£22.0	£25.8
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£4.5	£5.0	£6.0	£7.8	£9.7	£11.4
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£14.9	£16.5	£18.7	£22.7	£27.4	£32.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£181.4	£202.2	£231.0	£298.9	£380.1	£445.2
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£17.0	£19.0	£21.8	£27.0	£33.0	£38.7
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£1.1	£1.2	£1.4	£1.7	£2.0	£2.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£19.2	£21.4	£24.1	£28.9	£34.6	£40.5
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£1.6	£1.7	£2.0	£2.3	£2.7	£3.2
NEIGHBOURHOOD CENTRES:								
ZONE 1:	**ABBEY WOOD**		£0.0	£0.0	£0.0	£0.1	£0.1	£0.1
ZONES 1-6:	**OTHER CENTRES:**		£0.5	£0.6	£0.6	£0.7	£0.9	£1.0
ALL OTHER LOCAL STORES			£0.7	£0.8	£0.8	£1.0	£1.2	£1.4
EDGE & OUT-OF-CENTRE STORES/SCHEMES								
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£72.2	£80.5	£92.2	£124.7	£163.7	£191.5
ZONE 2:	**ERITH**	Madford Retail Park	£0.4	£0.5	£0.5	£0.7	£1.0	£1.1
ZONE 5:	**CRAYFORD**	Tower Retail Park	£29.3	£32.7	£37.5	£46.7	£57.3	£67.1
ZONE 6:	**SIDCUP**	Crittals Corner	£18.6	£20.8	£23.4	£28.2	£33.7	£39.5
ZONES 1-6:	**OTHER**		£0.2	£0.3	£0.3	£0.4	£0.5	£0.6
BOROUGH TOTAL			**£376.0**	**£419.2**	**£479.2**	**£616.9**	**£780.2**	**£913.6**

Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

			ESTIMATED 'INFLOW'	TOTAL FORECAST TURNOVER (£ million)					
				2015	**2016**	**2021**	**2026**	**2031**	**2036**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		5%	£4.2	£4.7	£5.5	£7.9	£10.8	£12.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		25%	£13.9	£15.5	£18.1	£23.5	£29.4	£34.4
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		5%	£4.8	£5.3	£6.3	£8.2	£10.2	£12.0
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		25%	£19.9	£22.1	£24.9	£30.3	£36.5	£42.7
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		25%	£241.8	£269.5	£308.0	£398.5	£506.7	£593.7
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		25%	£22.6	£25.3	£29.0	£36.0	£44.0	£51.5
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		25%	£1.4	£1.6	£1.8	£2.2	£2.7	£3.2
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		40%	£32.0	£35.6	£40.2	£48.2	£57.7	£67.4
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		10%	£1.7	£1.9	£2.2	£2.6	£3.0	£3.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	**ABBEY WOOD**		50%	£0.1	£0.1	£0.1	£0.1	£0.2	£0.3
ZONES 1-6:	**OTHER CENTRES:**		10%	£0.6	£0.6	£0.7	£0.8	£1.0	£1.1
ALL OTHER LOCAL STORES			5%	£0.7	£0.8	£0.9	£1.1	£1.3	£1.5
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	20%	£90.2	£100.6	£115.3	£155.8	£204.6	£239.4
ZONE 2:	**ERITH**	Madford Retail Park	35%	£0.6	£0.7	£0.8	£1.1	£1.5	£1.7
ZONE 5:	**CRAYFORD**	Tower Retail Park	40%	£48.9	£54.5	£62.4	£77.8	£95.5	£111.9
ZONE 6:	**SIDCUP**	Crittals Corner	50%	£37.1	£41.5	£46.9	£56.3	£67.5	£78.9
ZONES 1-6:	**OTHER**		15%	£0.3	£0.3	£0.4	£0.5	£0.6	£0.7
BOROUGH TOTAL				**£521.0**	**£580.7**	**£663.5**	**£851.0**	**£1,073.2**	**£1,256.6**

Notes: ! The 'inflow' of expenditure to the Borough's centres and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Greenwich and Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB Bexley

TABLE 15: NEW COMPARISON RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	In centre	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Local shops	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green:	Out of Centre	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre:	In Centre	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre:	In Centre	£22.4	£24.8	£27.6	£30.8	£31.5	£35.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall:	In Centre	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
Crayford Retail Park		£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
TOTAL:		**£42.1**	**£46.6**	**£51.9**	**£57.8**	**£59.1**	**£65.9**

TABLE 16a: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT

ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	53.9%	53.9%	53.9%	53.9%	53.9%	53.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£376.0	£419.2	£479.2	£616.9	£780.2	£913.6
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	28%	28%	28%	28%	28%	28%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£144.9	£161.6	£184.3	£234.1	£293.0	£343.1
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£521.0	£580.7	£663.5	£851.0	£1,073.2	£1,256.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£521.0	£532.9	£588.4	£656.1	£731.5	£815.5
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£47.8	£75.1	£194.9	£341.7	£441.1
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£42.1	£46.6	£51.9	£57.8	£59.1	£65.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£42.1**	**£1.1**	**£23.2**	**£137.1**	**£282.6**	**£375.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	**-7,017**	**186**	**3,430**	**18,143**	**33,544**	**39,942**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-10,025	266	4,901	25,918	47,920	57,059

STEP 1: ! Total available expenditure derived from Table 3.

STEP 2: ! Retention level (%) for the study area at the base year (2015) derived from revised market shares in Table 7a. Assume constant market shares over the forecast period.

STEP 3: ! Retention level (£m) over the forecast period derived from Tables 7b, 8-12, assuming constant market shares.

STEPS 4&5: ! Estimated 'inflow' (% and £m) from outside the study area is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, other published retail assessments in support of planning applications, healthchecks and other survey evidence.

STEP 6: ! Total forecast 'potential' turnover has been informed by the (survey-derived) market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5)

STEP 7: ! For the purpose of this assessment it has been assumed that the comparison goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified comparison goods floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the avaialable evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new comparison goods floorspace, informed by Experian's latest growth forecasts and current research. Experian's annual average growth rate ranges from 2% to 3.8% over the forecast period.

STEP 8: ! The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7).

STEP 9: ! This step makes an allowance for all major comparison goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted).

STEP 10: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)). !

STEP 11: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace.

TABLE 16b: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH
ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	53.9%	53.9%	53.9%	53.9%	53.9%	53.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£376.0	£419.2	£479.2	£616.9	£780.2	£913.6
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	27.8%	27.8%	27.8%	27.8%	27.8%	27.8%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£144.9	£161.6	£184.3	£234.1	£293.0	£343.1
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£521.0	£580.7	£663.5	£851.0	£1,073.2	£1,256.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£521.0	£532.9	£588.4	£656.1	£731.5	£815.5
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£47.8	£75.1	£194.9	£341.7	£441.1
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£19.7	£21.8	£24.3	£27.1	£27.7	£30.8
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£19.7**	**£25.9**	**£50.8**	**£167.9**	**£314.0**	**£410.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,284	4,227	7,503	22,216	37,277	43,675
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,692	6,039	10,719	31,737	53,253	62,393

TABLE 17a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£181.38	£202.16	£230.99	£298.91	£380.06	£445.24
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£60.5	£67.4	£77.0	£99.6	£126.7	£148.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£241.8	£269.5	£308.0	£398.5	£506.7	£593.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£241.8	£247.4	£273.2	£304.5	£339.6	£378.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£22.1	£34.8	£94.0	£167.2	£215.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£23.0	£25.4	£28.3	£31.6	£32.2	£36.0
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£23.0**	**-£3.3**	**£6.5**	**£62.4**	**£134.9**	**£179.1**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,828	-536	964	8,264	16,018	19,070
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-5,468	-765	1,377	11,806	22,883	27,243

TABLE 17b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO BEXLEYHEATH

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£181.38	£202.16	£230.99	£298.91	£380.06	£445.24
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	28%	28%	28%	28%	28%	28%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£60.5	£67.4	£77.0	£99.6	£126.7	£148.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£241.8	£269.5	£308.0	£398.5	£506.7	£593.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£241.8	£247.4	£273.2	£304.5	£339.6	£378.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£22.1	£34.8	£94.0	£167.2	£215.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£0.6**	**£21.5**	**£34.1**	**£93.2**	**£166.4**	**£214.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-94	3,506	5,037	12,337	19,751	22,803
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-135	5,008	7,195	17,625	28,216	32,576

TABLE 18: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	6.6%	6.6%	6.6%	6.6%	6.6%	6.6%
STEP 3:	**'RETENTION' LEVEL (£m):**	£46.33	£51.68	£59.23	£73.70	£90.29	£105.78
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	35%	35%	35%	35%	35%	35%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£25.2	£28.1	£32.2	£40.1	£49.2	£57.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£71.6	£79.8	£91.5	£113.8	£139.5	£163.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£71.6	£73.2	£80.8	£90.1	£100.5	£112.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£6.6	£10.6	£23.7	£39.0	£51.4
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Retail units, Crayford Town Hall, Crayford:	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
	Crayford Retail Park - Roman Road, Crayford:	£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£7.6**	**-£1.8**	**£1.3**	**£13.3**	**£28.4**	**£39.5**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-1,261	-289	193	1,762	3,370	4,211
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-1,802	-413	276	2,518	4,814	6,015

Notes: Turnover forecasts include Tower Retail Park

TABLE 19: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
STEP 3:	**'RETENTION' LEVEL (£m):**	£10.43	£11.66	£13.60	£17.61	£22.03	£25.80
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£3.5	£3.9	£4.5	£5.9	£7.3	£8.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£13.9	£15.5	£18.1	£23.5	£29.4	£34.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£13.9	£14.2	£15.7	£17.5	£19.5	£21.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.3	£2.4	£6.0	£9.8	£12.6
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.3**	**£2.4**	**£6.0**	**£9.8**	**£12.6**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	0	213	358	790	1,168	1,344
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	305	511	1,128	1,668	1,919

TABLE 20: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	2.1%	2.1%	2.1%	2.1%	2.1%	2.1%
STEP 3:	**'RETENTION' LEVEL (£m):**	£14.90	£16.54	£18.69	£22.69	£27.40	£32.03
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£5.0	£5.5	£6.2	£7.6	£9.1	£10.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£19.9	£22.1	£24.9	£30.3	£36.5	£42.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£19.9	£20.3	£22.4	£25.0	£27.9	£31.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.7	£2.5	£5.2	£8.6	£11.6
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.2**	**£0.4**	**£1.0**	**£3.6**	**£7.0**	**£9.8**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-198	68	150	477	828	1,039
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-283	96	215	682	1,183	1,484

TABLE 21: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£19.2	£21.4	£24.1	£28.9	£34.6	£40.5
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	40%	40%	40%	40%	40%	40%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£12.8	£14.2	£16.1	£19.3	£23.1	£27.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£32.0	£35.6	£40.2	£48.2	£57.7	£67.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£32.0	£32.7	£36.1	£40.3	£44.9	£50.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£2.9	£4.1	£7.9	£12.8	£17.4
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£2.9**	**£4.1**	**£7.9**	**£12.8**	**£17.4**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	0	469	599	1,044	1,516	1,851
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	0	671	856	1,491	2,166	2,644

TABLE 22: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	10.9%	10.9%	10.9%	10.9%	10.9%	10.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£76.2	£85.0	£97.5	£132.2	£174.0	£203.6
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.3	£20.4	£23.4	£31.6	£41.6	£48.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£94.5	£105.4	£120.9	£163.9	£215.6	£252.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£94.5	£96.7	£106.8	£119.0	£132.7	£148.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£8.7	£14.1	£44.8	£82.9	£104.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
	No named operator - Imperial Gateway, Belvedere:	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
	Retail units - Southmere Village, Tavy Bridge, Thamemead:	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£8.9**	**-£1.2**	**£3.2**	**£32.6**	**£70.4**	**£90.4**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-1,477	-188	468	4,318	8,359	9,626
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-2,111	-268	668	6,169	11,941	13,751

Notes: Turnover forecasts include Belvedere District Centre, Abbey Wood Neighbourhood Centre & Lower Road/Picardy Manorway

TABLE 23: REST OF STUDY AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£697.3	£777.3	£886.6	£1,128.7	£1,416.1	£1,658.1
STEP 2:	**'RETENTION' LEVEL (%):**	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£27.6	£30.8	£35.1	£42.9	£51.8	£60.6
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	42%	42%	42%	42%	42%	42%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£19.7	£22.0	£24.9	£30.0	£36.0	£42.1
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£47.3	£52.8	£60.0	£72.9	£87.8	£102.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£47.3	£48.4	£53.4	£59.5	£66.4	£74.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.4	£6.6	£13.3	£21.4	£28.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Retail units - Howbury Centre, Slade Green (Zone 2):	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
	Retail units - Christopher House, Sidcup (Zone 6):	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.5**	**£2.8**	**£4.7**	**£11.2**	**£19.2**	**£26.3**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-253	448	698	1,488	2,285	2,802
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-361	640	997	2,125	3,264	4,004

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Erith and Crittals Co

APPENDIX 5B: COMPARISON CAPACITY ASSESSMENT UPDATE – HIGHER POPULATION GROWTH SCENARIO

COMPARISON GOODS CAPACITY - SCENARIO PH4 (HIGHER POPULATION GROWTH)

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	37,130	37,580	49,895	69,338	75,706	74,889
ZONE 2	Erith	45,804	45,918	51,467	52,956	66,181	65,853
ZONE 3	Welling	43,534	43,504	43,318	43,712	43,808	43,467
ZONE 4	Bexleyheath	32,003	32,022	32,014	32,857	33,990	34,282
ZONE 5	Crayford/Old Bexley	23,850	24,383	24,951	26,040	26,391	26,242
ZONE 6	Sidcup	54,329	54,406	54,248	54,492	54,665	54,350
STUDY AREA TOTAL:		**236,650**	**237,814**	**255,894**	**279,394**	**300,740**	**299,082**

Source: London Borough of Bexley (March 2015)
Notes: Scenario PH4 population projections are based on planned housing delivery by ward over the period 2011 to 2036.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£2,500	£2,774	£3,131	£3,683	£4,353	£5,120
ZONE 2	Erith	£2,635	£2,924	£3,300	£3,882	£4,588	£5,397
ZONE 3	Welling	£3,096	£3,436	£3,878	£4,561	£5,391	£6,341
ZONE 4	Bexleyheath	£3,120	£3,462	£3,908	£4,596	£5,432	£6,390
ZONE 5	Crayford/Old Bexley	£3,191	£3,541	£3,997	£4,701	£5,556	£6,535
ZONE 6	Sidcup	£3,203	£3,555	£4,013	£4,720	£5,578	£6,561

Source: Average spend per capita estimates for each zone are derived from Experian '*2015 - Retail Area Planner*' Reports (2013 prices)
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian *Retail Planner Briefing Note 12.1 (* October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL FORECAST GROWTH, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£92.8	£104.3	£156.2	£255.4	£329.5	£383.4	175.1%	313.1%
ZONE 2	Erith	£120.7	£134.3	£169.9	£205.6	£303.6	£355.4	70.3%	194.5%
ZONE 3	Welling	£134.8	£149.5	£168.0	£199.4	£236.2	£275.6	47.9%	104.5%
ZONE 4	Bexleyheath	£99.8	£110.9	£125.1	£151.0	£184.6	£219.0	51.3%	119.4%
ZONE 5	Crayford/Old Bexley	£76.1	£86.3	£99.7	£122.4	£146.6	£171.5	60.9%	125.4%
ZONE 6	Sidcup	£174.0	£193.4	£217.7	£257.2	£304.9	£356.6	47.8%	104.9%
TOTAL		**£698.3**	**£778.6**	**£936.6**	**£1,191.0**	**£1,505.6**	**£1,761.6**	**70.6%**	**152.3%**

Source: Expenditure calculated from Tables 1 & 2.

TABLE 4: ALL COMPARISON GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

			ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.6%	1.4%	0.2%	0.3%	0.0%	0.0%	0.7%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		2.6%	5.2%	0.9%	0.6%	3.2%	0.1%	1.9%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.7%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.1%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		34.4%	30.4%	26.8%	37.4%	20.8%	14.5%	26.2%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		1.2%	3.7%	0.9%	2.8%	4.4%	2.6%	2.5%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.8%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	16.2%	14.1%	12.6%	12.9%	3.2%	0.5%	9.3%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Tower Retail Park	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Crittals Corner	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**60.7%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.6%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.5%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.3%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.0%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.0%
Thamesmead			5.6%	0.4%	0.5%	0.1%	0.0%	0.1%	0.9%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**39.3%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.4%**
	TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 5: 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	£92.8	£120.7	£134.8	£99.8	£76.1	£174.0	£698.3
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£2.4	£1.7	£0.2	£0.3	£0.0	£0.0	£4.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£2.4	£6.3	£1.2	£0.6	£2.4	£0.1	£13.0
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.2	£3.7	£0.3	£0.1	£0.1	£0.1	£4.6
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£0.6	£1.0	£10.8	£1.1	£0.1	£1.3	£14.9
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£32.0	£36.7	£36.1	£37.4	£15.8	£25.3	£183.3
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.1	£4.4	£1.2	£2.8	£3.4	£4.6	£17.6
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.4	£0.6	£1.4	£0.2	£1.4	£15.2	£19.2
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£15.0	£17.0	£17.0	£12.8	£2.4	£0.9	£65.1
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.5	£4.4	£2.8	£4.6	£9.3	£29.4
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.2	£0.6	£5.0	£10.3	£18.6
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.2
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£56.4**	**£78.6**	**£74.8**	**£59.6**	**£35.9**	**£69.4**	**£374.7**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.2	£17.6
Charlton			£2.2	£0.5	£2.8	£0.1	£0.1	£1.1	£6.8
Dartford			£1.1	£3.5	£1.0	£5.7	£9.6	£1.9	£22.8
Eltham			£0.0	£0.0	£3.2	£0.7	£0.8	£7.0	£11.7
Lakeside			£2.1	£2.2	£4.0	£2.3	£1.5	£3.2	£15.2
Bluewater			£14.9	£31.1	£38.7	£24.6	£23.0	£42.5	£174.7
Greenhithe			£1.4	£0.1	£1.8	£0.2	£0.0	£2.4	£6.0
Orpington			£0.9	£1.0	£1.8	£1.6	£2.0	£27.9	£35.2
Thamesmead			£5.2	£0.4	£0.6	£0.1	£0.0	£0.2	£6.6
West End			£0.6	£1.2	£2.2	£0.0	£1.0	£0.9	£5.9
Woolwich			£2.6	£1.2	£0.0	£0.0	£0.0	£0.0	£3.9
All Other Centres/ Stores			£5.0	£0.7	£3.4	£2.6	£1.3	£4.3	£17.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£36.5**	**£42.1**	**£60.0**	**£40.2**	**£40.2**	**£104.6**	**£323.5**
	TOTAL MARKET SHARE:		**£92.8**	**£120.7**	**£134.8**	**£99.8**	**£76.1**	**£174.0**	**£698.3**

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TABLE 6: NEW COMPARISON RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	Turnover 2015	Estimated Trade Draw		
				Zone 1	Zone 2	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%
Asda Superstore, Station Road, Belevedere	1205	£9,201	£11.1	50%	15%	35%

Notes: Elsewhere equates to trade draw from outside of the Borough

TABLE 7a: REVISED 2015 MARKET SHARE ANALYSIS (%) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELEVEDERE AND WAITROSE SIDCUP

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.0%	1.4%	0.2%	0.3%	0.0%	0.0%	0.6%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		1.1%	4.3%	0.9%	0.6%	3.2%	0.1%	1.5%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.7%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.1%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		33.2%	30.0%	26.8%	37.4%	20.8%	14.5%	26.0%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		0.6%	3.7%	0.9%	2.8%	4.4%	2.6%	2.4%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.7%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	22.2%	15.5%	12.6%	12.9%	3.2%	0.5%	10.4%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Crittals Corner	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Tower Retail Park	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**62.8%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.9%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.5%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.3%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.0%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.0%
Thamesmead			3.5%	0.4%	0.5%	0.1%	0.0%	0.1%	0.7%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**37.2%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.1%**
TOTAL MARKET SHARE:			**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELVEDERE

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£92.8**	**£120.7**	**£134.8**	**£99.8**	**£76.1**	**£174.0**	**£698.3**
ZONE 1:	**BELVEDERE DISTRICT CENTRE:**		£1.8	£1.7	£0.2	£0.3	£0.0	£0.0	£4.0
ZONE 2:	**ERITH MAJOR DISTRICT CENTRE:**		£1.0	£5.2	£1.2	£0.6	£2.4	£0.1	£10.5
ZONE 2:	**NORTHUMBERLAND HEATH DISTRICT CENTRE:**		£0.2	£3.7	£0.3	£0.1	£0.1	£0.1	£4.6
ZONE 3:	**WELLING MAJOR DISTRICT CENTRE:**		£0.6	£1.0	£10.8	£1.1	£0.1	£1.3	£14.9
ZONE 4:	**BEXLEYHEATH STRATEGIC CENTRE:**		£30.9	£36.2	£36.1	£37.4	£15.8	£25.3	£181.7
ZONE 5:	**CRAYFORD MAJOR DISTRICT CENTRE:**		£0.6	£4.4	£1.2	£2.8	£3.4	£4.6	£17.0
ZONE 5:	**BEXLEY VILLAGE DISTRICT CENTRE:**		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP MAJOR DISTRICT CENTRE:**		£0.4	£0.6	£1.4	£0.2	£1.4	£15.2	£19.2
ZONE 6:	BLACKFEN DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£20.6	£18.7	£17.0	£12.8	£2.4	£0.9	£72.3
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.5	£4.4	£2.8	£4.6	£9.3	£29.4
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.2	£0.6	£5.0	£10.3	£18.6
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.2
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£58.3**	**£78.6**	**£74.8**	**£59.6**	**£35.9**	**£69.4**	**£376.7**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.2	£17.6
Charlton			£2.2	£0.5	£2.8	£0.1	£0.1	£1.1	£6.8
Dartford			£1.1	£3.5	£1.0	£5.7	£9.6	£1.9	£22.8
Eltham			£0.0	£0.0	£3.2	£0.7	£0.8	£7.0	£11.7
Lakeside			£2.1	£2.2	£4.0	£2.3	£1.5	£3.2	£15.2
Bluewater			£14.9	£31.1	£38.7	£24.6	£23.0	£42.5	£174.7
Greenhithe			£1.4	£0.1	£1.8	£0.2	£0.0	£2.4	£6.0
Orpington			£0.9	£1.0	£1.8	£1.6	£2.0	£27.9	£35.2
Thamesmead			£3.3	£0.4	£0.6	£0.1	£0.0	£0.2	£4.7
West End			£0.6	£1.2	£2.2	£0.0	£1.0	£0.9	£5.9
Woolwich			£2.6	£1.2	£0.0	£0.0	£0.0	£0.0	£3.9
All Other Centres/ Stores			£5.0	£0.7	£3.4	£2.6	£1.3	£4.3	£17.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£34.5**	**£42.1**	**£60.0**	**£40.2**	**£40.2**	**£104.6**	**£321.6**
	TOTAL MARKET SHARE:		**£92.8**	**£120.7**	**£134.8**	**£99.8**	**£76.1**	**£174.0**	**£698.3**

TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£104.3**	**£134.3**	**£149.5**	**£110.9**	**£86.3**	**£193.4**	**£778.6**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE**:**		£2.1	£1.9	£0.3	£0.3	£0.0	£0.0	£4.5
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE**:**		£1.1	£5.8	£1.3	£0.7	£2.7	£0.1	£11.7
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE**:**		£0.2	£4.2	£0.3	£0.2	£0.1	£0.1	£5.1
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE**:**		£0.6	£1.1	£12.0	£1.2	£0.1	£1.5	£16.6
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE**:**		£34.7	£40.3	£40.0	£41.5	£17.9	£28.1	£202.6
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE**:**		£0.6	£4.9	£1.4	£3.1	£3.8	£5.1	£19.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE**:**		£0.0	£0.1	£0.0	£0.2	£0.9	£0.0	£1.2
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE**:**		£0.4	£0.7	£1.5	£0.2	£1.6	£16.9	£21.4
ZONE 6:	**BLACKFEN** DISTRICT CENTRE**:**		£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£1.7
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.6
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£23.1	£20.8	£18.8	£14.3	£2.7	£0.9	£80.6
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 5:	**CRAYFORD**	Tower Retail Park	£2.1	£7.2	£4.9	£3.1	£5.2	£10.3	£32.8
ZONE 6:	**SIDCUP**	Crittals Corner	£0.3	£0.2	£2.5	£0.7	£5.7	£11.4	£20.8
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£65.5**	**£87.4**	**£82.9**	**£66.2**	**£40.8**	**£77.2**	**£420.0**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.7	£0.1	£0.5	£2.6	£0.9	£14.7	£19.5
Charlton			£2.5	£0.5	£3.1	£0.1	£0.2	£1.2	£7.6
Dartford			£1.3	£3.9	£1.1	£6.3	£10.9	£2.1	£25.6
Eltham			£0.0	£0.0	£3.6	£0.8	£0.9	£7.7	£13.0
Lakeside			£2.3	£2.4	£4.4	£2.5	£1.7	£3.5	£16.9
Bluewater			£16.7	£34.6	£42.9	£27.3	£26.1	£47.2	£194.8
Greenhithe			£1.5	£0.1	£2.0	£0.2	£0.0	£2.7	£6.7
Orpington			£1.0	£1.1	£2.0	£1.7	£2.3	£31.0	£39.2
Thamesmead			£3.7	£0.5	£0.7	£0.1	£0.0	£0.3	£5.2
West End			£0.6	£1.3	£2.4	£0.0	£1.1	£1.1	£6.6
Woolwich			£2.9	£1.3	£0.0	£0.0	£0.0	£0.0	£4.3
All Other Centres/ Stores			£5.6	£0.8	£3.8	£2.9	£1.5	£4.8	£19.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£38.8**	**£46.8**	**£66.5**	**£44.7**	**£45.6**	**£116.3**	**£358.6**
	TOTAL MARKET SHARE:		**£104.3**	**£134.3**	**£149.5**	**£110.9**	**£86.3**	**£193.4**	**£778.6**

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		£156.2	£169.9	£168.0	£125.1	£99.7	£217.7	£936.6
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£3.1	£2.4	£0.3	£0.3	£0.0	£0.0	£6.1
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£1.7	£7.3	£1.5	£0.8	£3.1	£0.1	£14.5
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.4	£5.3	£0.4	£0.2	£0.1	£0.1	£6.4
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£1.0	£1.4	£13.4	£1.4	£0.2	£1.6	£19.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£51.9	£51.0	£45.0	£46.8	£20.7	£31.7	£247.1
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.0	£6.2	£1.5	£3.5	£4.4	£5.8	£22.4
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.3	£1.0	£0.0	£1.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.7	£0.9	£1.7	£0.3	£1.9	£19.0	£24.3
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£2.0
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.6
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.5	£0.0	£0.4	£0.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£34.7	£26.3	£21.1	£16.1	£3.2	£1.1	£102.4
ZONE 2:	**ERITH**	Madford Retail Park	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.6
ZONE 5:	**CRAYFORD**	Tower Retail Park	£3.1	£9.1	£5.5	£3.5	£6.0	£11.6	£38.8
ZONE 6:	**SIDCUP**	Crittals Corner	£0.5	£0.2	£2.8	£0.8	£6.5	£12.8	£23.7
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£98.1**	**£110.6**	**£93.2**	**£74.7**	**£47.1**	**£86.8**	**£510.6**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.0	£0.2	£0.6	£3.0	£1.1	£16.5	£22.3
Charlton			£3.7	£0.7	£3.5	£0.1	£0.2	£1.3	£9.5
Dartford			£1.9	£5.0	£1.2	£7.1	£12.6	£2.4	£30.2
Eltham			£0.0	£0.0	£4.0	£0.9	£1.0	£8.7	£14.6
Lakeside			£3.5	£3.0	£5.0	£2.8	£2.0	£4.0	£20.3
Bluewater			£25.1	£43.8	£48.2	£30.8	£30.1	£53.2	£231.1
Greenhithe			£2.3	£0.2	£2.3	£0.3	£0.1	£3.0	£8.1
Orpington			£1.5	£1.4	£2.2	£2.0	£2.7	£34.9	£44.7
Thamesmead			£5.5	£0.6	£0.8	£0.2	£0.0	£0.3	£7.3
West End			£0.9	£1.7	£2.7	£0.0	£1.3	£1.2	£7.9
Woolwich			£4.4	£1.7	£0.1	£0.0	£0.0	£0.0	£6.1
All Other Centres/ Stores			£8.4	£1.0	£4.2	£3.2	£1.7	£5.4	£23.9
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£58.1**	**£59.3**	**£74.8**	**£50.4**	**£52.6**	**£130.8**	**£426.0**
	TOTAL MARKET SHARE:		**£156.2**	**£169.9**	**£168.0**	**£125.1**	**£99.7**	**£217.7**	**£936.6**

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		£255.4	£205.6	£199.4	£151.0	£122.4	£257.2	£1,191.0
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£5.1	£2.9	£0.3	£0.4	£0.0	£0.0	£8.7
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£2.8	£8.8	£1.8	£0.9	£3.9	£0.1	£18.3
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.6	£6.4	£0.4	£0.2	£0.1	£0.2	£7.9
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£1.6	£1.7	£16.0	£1.7	£0.2	£1.9	£23.1
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£84.9	£61.7	£53.4	£56.6	£25.4	£37.4	£319.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.6	£7.5	£1.8	£4.3	£5.4	£6.8	£27.4
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.3	£1.2	£0.0	£1.7
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.1	£1.1	£2.0	£0.3	£2.3	£22.4	£29.2
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£2.3
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.6	£0.7
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.6	£0.0	£0.5	£1.0
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£56.6	£31.8	£25.1	£19.4	£3.9	£1.3	£138.1
ZONE 2:	**ERITH**	Madford Retail Park	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.8
ZONE 5:	**CRAYFORD**	Tower Retail Park	£5.1	£11.0	£6.5	£4.3	£7.4	£13.8	£47.9
ZONE 6:	**SIDCUP**	Crittals Corner	£0.8	£0.3	£3.3	£1.0	£8.0	£15.2	£28.5
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.1	£0.0	£0.1	£0.4
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£160.4**	**£133.9**	**£110.7**	**£90.2**	**£57.8**	**£102.6**	**£655.5**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.6	£0.2	£0.7	£3.6	£1.3	£19.5	£26.9
Charlton			£6.1	£0.8	£4.2	£0.1	£0.2	£1.6	£13.0
Dartford			£3.1	£6.0	£1.4	£8.6	£15.4	£2.8	£37.4
Eltham			£0.0	£0.0	£4.8	£1.1	£1.2	£10.3	£17.4
Lakeside			£5.7	£3.7	£5.9	£3.4	£2.5	£4.7	£25.9
Bluewater			£41.0	£53.0	£57.2	£37.2	£36.9	£62.8	£288.1
Greenhithe			£3.8	£0.2	£2.7	£0.3	£0.1	£3.6	£10.7
Orpington			£2.4	£1.7	£2.7	£2.4	£3.3	£41.2	£53.7
Thamesmead			£9.0	£0.7	£0.9	£0.2	£0.0	£0.4	£11.2
West End			£1.5	£2.0	£3.2	£0.0	£1.6	£1.4	£9.8
Woolwich			£7.1	£2.1	£0.1	£0.0	£0.0	£0.0	£9.3
All Other Centres/ Stores			£13.7	£1.2	£5.0	£3.9	£2.1	£6.3	£32.2
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£95.0**	**£71.7**	**£88.7**	**£60.9**	**£64.6**	**£154.6**	**£535.5**
	TOTAL MARKET SHARE:		**£255.4**	**£205.6**	**£199.4**	**£151.0**	**£122.4**	**£257.2**	**£1,191.0**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	**£329.5**	**£303.6**	**£236.2**	**£184.6**	**£146.6**	**£304.9**	**£1,505.6**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£6.5	£4.2	£0.4	£0.5	£0.0	£0.0	£11.7
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£3.6	£13.0	£2.1	£1.2	£4.6	£0.2	£24.6
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.8	£9.4	£0.5	£0.3	£0.1	£0.2	£11.3
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£2.0	£2.6	£18.9	£2.0	£0.2	£2.3	£28.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£109.6	£91.1	£63.3	£69.1	£30.4	£44.4	£407.8
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£2.0	£11.1	£2.2	£5.2	£6.5	£8.1	£35.1
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.4	£1.5	£0.0	£2.1
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.4	£1.6	£2.4	£0.4	£2.7	£26.6	£35.1
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£2.7	£2.7
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.7	£0.9
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.7	£0.0	£0.5	£1.2
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£73.1	£47.0	£29.7	£23.8	£4.7	£1.5	£179.7
ZONE 2:	**ERITH**	Madford Retail Park	£0.3	£0.7	£0.0	£0.0	£0.0	£0.1	£1.1
ZONE 5:	**CRAYFORD**	Tower Retail Park	£6.5	£16.2	£7.7	£5.2	£8.8	£16.3	£60.8
ZONE 6:	**SIDCUP**	Crittals Corner	£1.1	£0.4	£3.9	£1.2	£9.6	£18.0	£34.1
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.5
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£207.0**	**£197.7**	**£131.1**	**£110.2**	**£69.2**	**£121.6**	**£836.9**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£2.1	£0.3	£0.8	£4.4	£1.6	£23.1	£32.3
Charlton			£7.9	£1.2	£4.9	£0.2	£0.3	£1.8	£16.3
Dartford			£4.0	£8.9	£1.7	£10.5	£18.5	£3.3	£46.9
Eltham			£0.0	£0.0	£5.7	£1.4	£1.4	£12.2	£20.7
Lakeside			£7.4	£5.4	£7.0	£4.2	£3.0	£5.5	£32.5
Bluewater			£52.8	£78.2	£67.7	£45.5	£44.2	£74.5	£363.1
Greenhithe			£4.8	£0.3	£3.2	£0.4	£0.1	£4.3	£13.1
Orpington			£3.1	£2.6	£3.1	£2.9	£3.9	£48.9	£64.5
Thamesmead			£11.6	£1.1	£1.1	£0.2	£0.0	£0.4	£14.4
West End			£2.0	£3.0	£3.8	£0.0	£1.9	£1.7	£12.4
Woolwich			£9.2	£3.0	£0.1	£0.0	£0.0	£0.0	£12.3
All Other Centres/ Stores			£17.6	£1.8	£5.9	£4.8	£2.5	£7.5	£40.1
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£122.5**	**£105.9**	**£105.1**	**£74.4**	**£77.4**	**£183.3**	**£668.6**
	TOTAL MARKET SHARE:		**£329.5**	**£303.6**	**£236.2**	**£184.6**	**£146.6**	**£304.9**	**£1,505.6**

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	**£383.4**	**£355.4**	**£275.6**	**£219.0**	**£171.5**	**£356.6**	**£1,761.6**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£7.6	£4.9	£0.5	£0.6	£0.0	£0.1	£13.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£4.1	£15.2	£2.4	£1.4	£5.4	£0.2	£28.8
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.9	£11.0	£0.6	£0.3	£0.2	£0.2	£13.2
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£2.3	£3.0	£22.0	£2.4	£0.3	£2.7	£32.8
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£127.5	£106.6	£73.8	£82.0	£35.6	£51.9	£477.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£2.3	£13.0	£2.5	£6.2	£7.6	£9.4	£41.1
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.5	£1.7	£0.0	£2.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.6	£1.8	£2.8	£0.5	£3.2	£31.1	£41.0
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£3.1	£3.2
ZONE 1:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.2	£0.0	£0.9	£1.0
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.8	£0.0	£0.6	£1.4
ZONE 1:									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£85.0	£55.0	£34.7	£28.2	£5.4	£1.7	£210.0
ZONE 2:	**ERITH**	Madford Retail Park	£0.4	£0.8	£0.0	£0.0	£0.0	£0.1	£1.3
ZONE 5:	**CRAYFORD**	Tower Retail Park	£7.6	£19.0	£9.0	£6.2	£10.3	£19.1	£71.2
ZONE 6:	**SIDCUP**	Crittals Corner	£1.2	£0.5	£4.5	£1.4	£11.2	£21.0	£39.9
ZONES 1-6:	**OTHER**		£0.0	£0.3	£0.0	£0.2	£0.0	£0.1	£0.6
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£240.9**	**£231.4**	**£153.0**	**£130.8**	**£81.0**	**£142.3**	**£979.3**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£2.4	£0.3	£1.0	£5.2	£1.8	£27.1	£37.8
Charlton			£9.2	£1.4	£5.8	£0.2	£0.3	£2.2	£19.0
Dartford			£4.7	£10.4	£2.0	£12.5	£21.6	£3.9	£55.1
Eltham			£0.0	£0.0	£6.6	£1.6	£1.7	£14.3	£24.2
Lakeside			£8.6	£6.3	£8.1	£5.0	£3.5	£6.5	£38.0
Bluewater			£61.5	£91.6	£79.1	£54.0	£51.8	£87.1	£425.0
Greenhithe			£5.6	£0.4	£3.8	£0.5	£0.1	£5.0	£15.3
Orpington			£3.6	£3.0	£3.7	£3.4	£4.6	£57.2	£75.4
Thamesmead			£13.5	£1.2	£1.2	£0.3	£0.0	£0.5	£16.8
West End			£2.3	£3.5	£4.5	£0.0	£2.3	£1.9	£14.5
Woolwich			£10.7	£3.6	£0.1	£0.0	£0.0	£0.0	£14.4
All Other Centres/ Stores			£20.5	£2.1	£6.9	£5.6	£2.9	£8.8	£46.9
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£142.6**	**£124.0**	**£122.7**	**£88.3**	**£90.5**	**£214.3**	**£782.4**
	TOTAL MARKET SHARE:		**£383.4**	**£355.4**	**£275.6**	**£219.0**	**£171.5**	**£356.6**	**£1,761.6**

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA (i.e. excluding 'inflow')

			TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY) £m					
			2015	2016	2021	2026	2031	
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£4.0	£4.5	£6.1	£8.7	£11.7	£13.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£10.5	£11.7	£14.5	£18.3	£24.6	£28.8
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£4.6	£5.1	£6.4	£7.9	£11.3	£13.2
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£14.9	£16.6	£19.0	£23.1	£28.0	£32.8
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£181.7	£202.6	£247.1	£319.4	£407.8	£477.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£17.0	£19.0	£22.4	£27.4	£35.1	£41.1
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£1.1	£1.2	£1.4	£1.7	£2.1	£2.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£19.2	£21.4	£24.3	£29.2	£35.1	£41.0
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£1.6	£1.7	£2.0	£2.3	£2.7	£3.2
NEIGHBOURHOOD CENTRES:								
ZONE 1:	**ABBEY WOOD**		£0.0	£0.0	£0.1	£0.1	£0.1	£0.1
ZONES 1-6:	**OTHER CENTRES:**		£0.5	£0.6	£0.6	£0.7	£0.9	£1.0
ALL OTHER LOCAL STORES			£0.7	£0.8	£0.8	£1.0	£1.2	£1.4
EDGE & OUT-OF-CENTRE STORES/SCHEMES								
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£72.3	£80.6	£102.4	£138.1	£179.7	£210.0
ZONE 2:	**ERITH**	Madford Retail Park	£0.4	£0.5	£0.6	£0.8	£1.1	£1.3
ZONE 5:	**CRAYFORD**	Tower Retail Park	£29.4	£32.8	£38.8	£47.9	£60.8	£71.2
ZONE 6:	**SIDCUP**	Crittals Corner	£18.6	£20.8	£23.7	£28.5	£34.1	£39.9
ZONES 1-6:	**OTHER**		£0.2	£0.3	£0.3	£0.4	£0.5	£0.6
BOROUGH TOTAL			**£376.7**	**£420.0**	**£510.6**	**£655.5**	**£836.9**	**£979.3**

Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

			ESTIMATED 'INFLOW'	TOTAL FORECAST TURNOVER (£ million)					
				2015	2016	2021	2026	2031	2036
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		5%	£4.2	£4.7	£6.4	£9.2	£12.3	£14.4
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		25%	£14.0	£15.6	£19.3	£24.4	£32.8	£38.4
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		5%	£4.8	£5.3	£6.7	£8.3	£11.9	£13.9
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		25%	£19.9	£22.1	£25.3	£30.7	£37.4	£43.7
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		25%	£242.2	£270.1	£329.5	£425.8	£543.8	£636.6
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		25%	£22.7	£25.3	£29.9	£36.6	£46.8	£54.8
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		25%	£1.4	£1.6	£1.9	£2.3	£2.8	£3.3
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		40%	£32.0	£35.6	£40.6	£48.7	£58.5	£68.3
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		10%	£1.7	£1.9	£2.2	£2.6	£3.0	£3.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	**ABBEY WOOD**		50%	£0.1	£0.1	£0.1	£0.2	£0.2	£0.3
ZONES 1-6:	**OTHER CENTRES:**		10%	£0.6	£0.6	£0.7	£0.8	£1.0	£1.1
ALL OTHER LOCAL STORES			5%	£0.7	£0.8	£0.9	£1.1	£1.3	£1.5
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	20%	£90.4	£100.8	£128.0	£172.6	£224.6	£262.6
ZONE 2:	**ERITH**	Madford Retail Park	35%	£0.6	£0.7	£0.9	£1.2	£1.7	£2.0
ZONE 5:	**CRAYFORD**	Tower Retail Park	40%	£49.0	£54.7	£64.7	£79.9	£101.4	£118.6
ZONE 6:	**SIDCUP**	Crittals Corner	50%	£37.1	£41.5	£47.4	£57.1	£68.3	£79.9
ZONES 1-6:	**OTHER**		15%	£0.3	£0.3	£0.4	£0.5	£0.6	£0.7
BOROUGH TOTAL				**£521.8**	**£581.8**	**£704.9**	**£901.8**	**£1,148.3**	**£1,343.6**

Notes: ! The 'inflow' of expenditure to the Borough's centres and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Greenwich and Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB Bexley

TABLE 15: NEW COMPARISON RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre: !	In centre	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Local shops	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green: !	Out of Centre	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre: !	In Centre	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre: !	In Centre	£22.4	£24.8	£27.6	£30.8	£31.5	£35.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall: !	In Centre	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
Crayford Retail Park		£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
TOTAL:		**£42.1**	**£46.6**	**£51.9**	**£57.8**	**£59.1**	**£65.9**

TABLE 16a: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT

ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	53.9%	53.9%	53.9%	53.9%	53.9%	53.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£376.7	£420.0	£510.6	£655.5	£836.9	£979.3
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	28%	28%	28%	28%	28%	28%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£145.1	£161.8	£194.3	£246.3	£311.4	£364.3
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£521.8	£581.8	£704.9	£901.8	£1,148.3	£1,343.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£521.8	£533.8	£589.3	£657.1	£732.6	£816.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£48.1	£115.6	£244.7	£415.7	£526.8
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£42.1	£46.6	£51.9	£57.8	£59.1	£65.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£42.1**	**£1.4**	**£63.7**	**£186.9**	**£356.6**	**£460.9**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	**-7,017**	**234**	**9,398**	**24,735**	**42,325**	**49,068**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-10,025	334	13,425	35,336	60,465	70,097

STEP 1: ! Total available expenditure derived from Table 3.

STEP 2: ! Retention level (%) for the study area at the base year (2015) derived from revised market shares in Table 7a. Assume constant market shares over the forecast period.

STEP 3: ! Retention level (£m) over the forecast period derived from Tables 7b, 8-12, assuming constant market shares.

STEPS 4&5: ! Estimated 'inflow' (% and £m) from outside the study area is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, other published retail assessments in support of planning applications, healthchecks and other survey evidence.

STEP 6: ! Total forecast 'potential' turnover has been informed by the (survey-derived) market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5).

STEP 7: ! For the purpose of this assessment it has been assumed that the comparison goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified comparison goods floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the avaialable evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new comparison goods floorspace, informed by Experian's latest growth forecasts and current research. Experian's annual average growth rate ranges from 2% to 3.8% over the forecast period.

STEP 8: ! The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7).

STEP 9: ! This step makes an allowance for all major comparison goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted).

STEP 10: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)). !

STEP 11: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace.

TABLE 16b: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH

ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	53.9%	53.9%	53.9%	53.9%	53.9%	53.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£376.7	£420.0	£510.6	£655.5	£836.9	£979.3
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	27.8%	27.8%	27.8%	27.8%	27.8%	27.8%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£145.1	£161.8	£194.3	£246.3	£311.4	£364.3
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£521.8	£581.8	£704.9	£901.8	£1,148.3	£1,343.6
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£521.8	£533.8	£589.3	£657.1	£732.6	£816.8
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£48.1	£115.6	£244.7	£415.7	£526.8
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£19.7	£21.8	£24.3	£27.1	£27.7	£30.8
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£19.7**	**£26.2**	**£91.3**	**£217.7**	**£388.0**	**£495.9**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,284	4,275	13,470	28,808	46,059	52,802
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,692	6,107	19,243	41,155	65,798	75,431

TABLE 17a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	'RETENTION' LEVEL (%):	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%
STEP 3:	'RETENTION' LEVEL (£m):	£181.66	£202.55	£247.11	£319.36	£407.85	£477.43
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	25%	25%	25%	25%	25%	25%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£60.6	£67.5	£82.4	£106.5	£135.9	£159.1
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£242.2	£270.1	£329.5	£425.8	£543.8	£636.6
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£242.2	£247.8	£273.6	£305.0	£340.1	£379.2
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£22.3	£55.9	£120.8	£203.7	£257.4
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):	£23.0	£25.4	£28.3	£31.6	£32.2	£36.0
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**-£23.0**	**-£3.2**	**£27.6**	**£89.2**	**£171.5**	**£221.4**
STEP 11:	NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,828	-513	4,072	11,810	20,353	23,575
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-5,468	-733	5,817	16,872	29,076	33,679

TABLE 17b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO BEXLEYHEATH

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	'RETENTION' LEVEL (%):	26.0%	26.0%	26.0%	26.0%	26.0%	26.0%
STEP 3:	'RETENTION' LEVEL (£m):	£181.66	£202.55	£247.11	£319.36	£407.85	£477.43
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	28%	28%	28%	28%	28%	28%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£60.6	£67.5	£82.4	£106.5	£135.9	£159.1
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£242.2	£270.1	£329.5	£425.8	£543.8	£636.6
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£242.2	£247.8	£273.6	£305.0	£340.1	£379.2
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£22.3	£55.9	£120.8	£203.7	£257.4
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**-£0.6**	**£21.7**	**£55.2**	**£120.0**	**£202.9**	**£256.5**
STEP 11:	NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-94	3,528	8,145	15,883	24,086	27,309
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-135	5,040	11,636	22,690	34,409	39,012

TABLE 18: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	'RETENTION' LEVEL (%):	6.6%	6.6%	6.6%	6.6%	6.6%	6.6%
STEP 3:	'RETENTION' LEVEL (£m):	£46.42	£51.79	£61.26	£75.36	£95.90	£112.28
STEP 4:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):	35%	35%	35%	35%	35%	35%
STEP 5:	ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):	£25.3	£28.2	£33.4	£41.1	£52.2	£61.2
STEP 6:	TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£71.7	£80.0	£94.6	£116.5	£148.1	£173.4
STEP 7:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£71.7	£73.3	£81.0	£90.3	£100.7	£112.2
STEP 8:	TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£6.7	£13.7	£26.2	£47.5	£61.2
STEP 9:	FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):						
	Retail units, Crayford Town Hall, Crayford:	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
	Crayford Retail Park - Roman Road, Crayford:	£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
STEP 10:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**-£7.6**	**-£1.7**	**£4.3**	**£15.8**	**£36.9**	**£49.4**
STEP 11:	NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-1,261	-281	639	2,090	4,375	5,255
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-1,802	-402	913	2,985	6,250	7,507

Notes: Turnover forecasts include Tower Retail Park

TABLE 19: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
STEP 3:	**'RETENTION' LEVEL (£m):**	£10.48	£11.72	£14.49	£18.27	£24.60	£28.77
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£3.5	£3.9	£4.8	£6.1	£8.2	£9.6
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£14.0	£15.6	£19.3	£24.4	£32.8	£38.4
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£14.0	£14.3	£15.8	£17.6	£19.6	£21.9
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.3	£3.5	£6.8	£13.2	£16.5
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.3**	**£3.5**	**£6.8**	**£13.2**	**£16.5**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	0	217	522	894	1,563	1,755
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	0	309	746	1,278	2,233	2,507

TABLE 20: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	2.1%	2.1%	2.1%	2.1%	2.1%	2.1%
STEP 3:	**'RETENTION' LEVEL (£m):**	£14.91	£16.55	£19.01	£23.05	£28.05	£32.78
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£5.0	£5.5	£6.3	£7.7	£9.3	£10.9
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£19.9	£22.1	£25.3	£30.7	£37.4	£43.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£19.9	£20.3	£22.4	£25.0	£27.9	£31.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.7	£2.9	£5.7	£9.5	£12.6
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.2**	**£0.4**	**£1.4**	**£4.1**	**£7.8**	**£10.7**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	-198	68	212	539	928	1,142
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	-283	97	303	770	1,326	1,632

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TABLE 21: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	2.7%	2.7%	2.7%	2.7%	2.7%	2.7%
STEP 3:	**'RETENTION' LEVEL (£m):**	£19.2	£21.4	£24.3	£29.2	£35.1	£41.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	40%	40%	40%	40%	40%	40%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£12.8	£14.2	£16.2	£19.5	£23.4	£27.3
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£32.0	£35.6	£40.6	£48.7	£58.5	£68.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£32.0	£32.7	£36.1	£40.3	£44.9	£50.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£2.9	£4.5	£8.4	£13.5	£18.3
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£2.9**	**£4.5**	**£8.4**	**£13.5**	**£18.3**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	0	470	657	1,109	1,608	1,946
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	0	671	939	1,584	2,297	2,780

TABLE 22: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	10.9%	10.9%	10.9%	10.9%	10.9%	10.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£76.4	£85.2	£108.5	£146.9	£191.5	£223.8
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.3	£20.4	£26.0	£35.1	£45.7	£53.4
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£94.7	£105.6	£134.5	£182.0	£237.1	£277.2
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£94.7	£96.9	£107.0	£119.3	£133.0	£148.3
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£8.7	£27.5	£62.7	£104.1	£128.9
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
	No named operator - Imperial Gateway, Belvedere:	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
	Retail units - Southmere Village, Tavy Bridge, Thamemead:	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£8.9**	**-£1.1**	**£16.6**	**£50.5**	**£91.7**	**£115.1**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	-1,477	-176	2,452	6,685	10,885	12,250
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	-2,111	-252	3,503	9,550	15,550	17,501

Notes: Turnover forecasts include Belvedere District Centre, Abbey Wood Neighbourhood Centre & Lower Road/Picardy Manorway

TABLE 23: REST OF STUDY AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£698.3	£778.6	£936.6	£1,191.0	£1,505.6	£1,761.6
STEP 2:	**'RETENTION' LEVEL (%):**	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£27.6	£30.8	£35.8	£43.4	£54.0	£63.2
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	42%	42%	42%	42%	42%	42%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£19.7	£22.0	£25.2	£30.4	£36.6	£42.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£47.3	£52.8	£61.0	£73.8	£90.6	£106.0
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£47.3	£48.4	£53.4	£59.6	£66.4	£74.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.4	£7.6	£14.2	£24.1	£31.9
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Retail units - Howbury Centre, Slade Green (Zone 2):	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
	Retail units - Christopher House, Sidcup (Zone 6):	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.5**	**£2.8**	**£5.7**	**£12.2**	**£22.0**	**£29.5**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	-253	450	843	1,608	2,614	3,144
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	-361	643	1,204	2,297	3,734	4,492

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Erith and Crittals Co

APPENDIX 5C: COMPARISON CAPACITY ASSESSMENT UPDATE – EXPERIAN POPULATION GROWTH SCENARIO

COMPARISON GOODS CAPACITY - EXPERIAN POPULATION GROWTH

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2036)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	36,530	36,895	38,775	40,631	42,369	44,335
ZONE 2	Erith	46,279	46,734	49,056	51,364	53,557	56,022
ZONE 3	Welling	45,083	45,516	47,733	49,924	52,013	54,377
ZONE 4	Bexleyheath	32,843	33,175	34,860	36,531	38,113	39,893
ZONE 5	Crayford/Old Bexley	23,749	23,979	25,162	26,340	27,452	28,707
ZONE 6	Sidcup	56,619	57,165	59,989	62,788	65,385	68,326
STUDY AREA TOTAL:		**241,103**	**243,464**	**255,575**	**267,578**	**278,889**	**291,660**

Source: Experian MMG3 !
Notes: Population projections based the ONS's 2012-based Sub National Population Projections released in May 2014. !

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036
ZONE 1	Belvedere	£2,500	£2,774	£3,131	£3,683	£4,353	£5,120
ZONE 2	Erith	£2,635	£2,924	£3,300	£3,882	£4,588	£5,397
ZONE 3	Welling	£3,096	£3,436	£3,878	£4,561	£5,391	£6,341
ZONE 4	Bexleyheath	£3,120	£3,462	£3,908	£4,596	£5,432	£6,390
ZONE 5	Crayford/Old Bexley	£3,191	£3,541	£3,997	£4,701	£5,556	£6,535
ZONE 6	Sidcup	£3,203	£3,555	£4,013	£4,720	£5,578	£6,561

Source: Average spend per capita estimates for each zone are derived from Experian *'2015 - Retail Area Planner'* Reports (2013 prices)
Notes: Annual expenditure growth forecasts for comparison goods informed by Experian *Retail Planner Briefing Note 12.1 (* October 2014).
Expenditure on SFT has been deducted at the outset, and is also informed by Experian Business Strategies Retail Planner Briefing Note 12.1 (Appendix 3).

TABLE 3: TOTAL FORECAST GROWTH, 2015 - 2036 (£ million)

Zones & Broad Geographic Region:		2015	2016	2021	2026	2031	2036	2015-2026	2015-2036
ZONE 1	Belvedere	£91.3	£102.4	£121.4	£149.7	£184.4	£227.0	63.9%	148.6%
ZONE 2	Erith	£121.9	£136.7	£161.9	£199.4	£245.7	£302.3	63.5%	147.9%
ZONE 3	Welling	£139.6	£156.4	£185.1	£227.7	£280.4	£344.8	63.2%	147.0%
ZONE 4	Bexleyheath	£102.5	£114.9	£136.2	£167.9	£207.0	£254.9	63.9%	148.8%
ZONE 5	Crayford/Old Bexley	£75.8	£84.9	£100.6	£123.8	£152.5	£187.6	63.4%	147.6%
ZONE 6	Sidcup	£181.4	£203.2	£240.7	£296.3	£364.7	£448.3	63.4%	147.2%
TOTAL		**£712.4**	**£798.4**	**£945.9**	**£1,164.9**	**£1,434.8**	**£1,765.0**	**63.5%**	**147.7%**

Source: Expenditure calculated from Tables 1 & 2.

TABLE 4: ALL COMPARISON GOODS SHOPPING - 2015 MARKET SHARE ANALYSIS (%)

			ZONE 1 Belvedere	ZONE 2 Erith	ZONE 3 Welling	ZONE 4 Bexleyheath	ZONE 5 Crayford/ Old Bexley	ZONE 6 Sidcup	TOTAL
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.6%	1.4%	0.2%	0.3%	0.0%	0.0%	0.7%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		2.6%	5.2%	0.9%	0.6%	3.2%	0.1%	1.9%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.7%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.1%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		34.4%	30.4%	26.8%	37.4%	20.8%	14.5%	26.2%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		1.2%	3.7%	0.9%	2.8%	4.4%	2.6%	2.5%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.8%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	16.2%	14.1%	12.6%	12.9%	3.2%	0.5%	9.3%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Tower Retail Park	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Crittals Corner	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**60.7%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.6%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.5%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.3%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.0%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.0%
Thamesmead			5.6%	0.4%	0.5%	0.1%	0.0%	0.1%	0.9%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**39.3%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.4%**
	TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 5: 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	**£91.3**	**£121.9**	**£139.6**	**£102.5**	**£75.8**	**£181.4**	**£712.4**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£2.4	£1.7	£0.2	£0.3	£0.0	£0.0	£4.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£2.3	£6.4	£1.2	£0.6	£2.4	£0.1	£13.1
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.2	£3.8	£0.3	£0.1	£0.1	£0.1	£4.6
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£0.6	£1.0	£11.2	£1.1	£0.1	£1.4	£15.4
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£31.5	£37.1	£37.4	£38.4	£15.7	£26.4	£186.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.1	£4.5	£1.3	£2.9	£3.4	£4.8	£17.9
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.4	£0.6	£1.4	£0.2	£1.4	£15.8	£19.9
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£14.8	£17.2	£17.6	£13.2	£2.4	£0.9	£66.0
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.5	£4.6	£2.9	£4.6	£9.7	£30.0
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.3	£0.7	£5.0	£10.7	£19.1
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£55.5**	**£79.4**	**£77.5**	**£61.2**	**£35.8**	**£72.4**	**£381.6**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.8	£18.2
Charlton			£2.2	£0.5	£2.9	£0.1	£0.1	£1.1	£6.9
Dartford			£1.1	£3.6	£1.0	£5.8	£9.6	£2.0	£23.1
Eltham			£0.0	£0.0	£3.3	£0.8	£0.7	£7.3	£12.1
Lakeside			£2.1	£2.2	£4.1	£2.3	£1.5	£3.3	£15.5
Bluewater			£14.6	£31.4	£40.0	£25.2	£22.9	£44.3	£178.5
Greenhithe			£1.3	£0.1	£1.9	£0.2	£0.0	£2.5	£6.2
Orpington			£0.9	£1.0	£1.9	£1.6	£2.0	£29.1	£36.5
Thamesmead			£5.1	£0.4	£0.6	£0.1	£0.0	£0.3	£6.6
West End			£0.6	£1.2	£2.3	£0.0	£1.0	£1.0	£6.0
Woolwich			£2.5	£1.2	£0.0	£0.0	£0.0	£0.0	£3.8
All Other Centres/ Stores			£4.9	£0.7	£3.5	£2.6	£1.3	£4.5	£17.5
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£35.9**	**£42.5**	**£62.1**	**£41.3**	**£40.0**	**£109.0**	**£330.8**
	TOTAL MARKET SHARE:		**£91.3**	**£121.9**	**£139.6**	**£102.5**	**£75.8**	**£181.4**	**£712.4**

TABLE 6: NEW COMPARISON RETAIL FLOORSPACE TRADING SINCE 2013

	Estimated Sales Area	Average Sales Density	Turnover 2015	Estimated Trade Draw		
				Zone 1	Zone 2	Elsewhere
	(m^2 net)	(£ per m^2)	(£m)	%	%	%
Asda Superstore, Station Road, Belevedere	1205	£9,201	£11.1	50%	15%	35%

Notes: Elsewhere equates to trade draw from outside of the Borough

TABLE 7a: REVISED 2015 MARKET SHARE ANALYSIS (%) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELEVEDERE AND WAITROSE SIDCUP

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		2.0%	1.4%	0.2%	0.3%	0.0%	0.0%	0.6%
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		1.1%	4.3%	0.9%	0.6%	3.2%	0.1%	1.5%
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		0.2%	3.1%	0.2%	0.1%	0.1%	0.1%	0.6%
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		0.6%	0.8%	8.0%	1.1%	0.2%	0.8%	2.2%
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		33.2%	30.0%	26.8%	37.4%	20.8%	14.5%	25.9%
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		0.6%	3.7%	0.9%	2.8%	4.4%	2.6%	2.4%
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		0.0%	0.1%	0.0%	0.2%	1.0%	0.0%	0.2%
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		0.4%	0.5%	1.0%	0.2%	1.9%	8.7%	2.8%
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONES 1-6:	OTHER CENTRES:		0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%
ALL OTHER LOCAL STORES			0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.1%
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	22.3%	15.4%	12.6%	12.9%	3.2%	0.5%	10.3%
ZONE 2:	**ERITH**	Madford Retail Park	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%
ZONE 5:	**CRAYFORD**	Crittals Corner	2.0%	5.3%	3.3%	2.8%	6.0%	5.3%	4.2%
ZONE 6:	**SIDCUP**	Tower Retail Park	0.3%	0.1%	1.6%	0.6%	6.6%	5.9%	2.7%
ZONES 1-6:	**OTHER**		0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**62.9%**	**65.1%**	**55.5%**	**59.7%**	**47.2%**	**39.9%**	**53.8%**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			0.6%	0.1%	0.3%	2.4%	1.1%	7.6%	2.6%
Charlton			2.4%	0.4%	2.1%	0.1%	0.2%	0.6%	1.0%
Dartford			1.2%	2.9%	0.7%	5.7%	12.6%	1.1%	3.2%
Eltham			0.0%	0.0%	2.4%	0.7%	1.0%	4.0%	1.7%
Lakeside			2.2%	1.8%	2.9%	2.3%	2.0%	1.8%	2.2%
Bluewater			16.0%	25.8%	28.7%	24.6%	30.2%	24.4%	25.1%
Greenhithe			1.5%	0.1%	1.4%	0.2%	0.1%	1.4%	0.9%
Orpington			0.9%	0.9%	1.3%	1.6%	2.7%	16.0%	5.1%
Thamesmead			3.5%	0.4%	0.5%	0.1%	0.0%	0.1%	0.6%
West End			0.6%	1.0%	1.6%	0.0%	1.3%	0.5%	0.8%
Woolwich			2.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.5%
All Other Centres/ Stores			5.3%	0.6%	2.5%	2.6%	1.7%	2.5%	2.5%
SUB-TOTAL-OUTSIDE BOROUGH AREA			**37.1%**	**34.9%**	**44.5%**	**40.3%**	**52.8%**	**60.1%**	**46.2%**
	TOTAL MARKET SHARE:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 7b: REVISED 2015 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING - INCLUDING ASDA BELEVEDERE

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£91.3**	**£121.9**	**£139.6**	**£102.5**	**£75.8**	**£181.4**	**£712.4**
ZONE 1:	**BELVEDERE DISTRICT CENTRE:**		£1.8	£1.7	£0.2	£0.3	£0.0	£0.0	£4.0
ZONE 2:	**ERITH MAJOR DISTRICT CENTRE:**		£1.0	£5.2	£1.2	£0.6	£2.4	£0.1	£10.6
ZONE 2:	**NORTHUMBERLAND HEATH DISTRICT CENTRE:**		£0.2	£3.8	£0.3	£0.1	£0.1	£0.1	£4.6
ZONE 3:	**WELLING MAJOR DISTRICT CENTRE:**		£0.6	£1.0	£11.2	£1.1	£0.1	£1.4	£15.4
ZONE 4:	**BEXLEYHEATH STRATEGIC CENTRE:**		£30.3	£36.6	£37.4	£38.4	£15.7	£26.4	£184.8
ZONE 5:	**CRAYFORD MAJOR DISTRICT CENTRE:**		£0.5	£4.5	£1.3	£2.9	£3.4	£4.8	£17.3
ZONE 5:	**BEXLEY VILLAGE DISTRICT CENTRE:**		£0.0	£0.1	£0.0	£0.2	£0.8	£0.0	£1.1
ZONE 6:	**SIDCUP MAJOR DISTRICT CENTRE:**		£0.4	£0.6	£1.4	£0.2	£1.4	£15.8	£19.9
ZONE 6:	BLACKFEN DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£1.6
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.5
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.3	£0.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£20.3	£18.8	£17.6	£13.2	£2.4	£0.9	£73.2
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4
ZONE 5:	**CRAYFORD**	Crittals Corner	£1.8	£6.5	£4.6	£2.9	£4.6	£9.7	£30.0
ZONE 6:	**SIDCUP**	Tower Retail Park	£0.3	£0.2	£2.3	£0.7	£5.0	£10.7	£19.1
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£57.4**	**£79.4**	**£77.5**	**£61.2**	**£35.8**	**£72.4**	**£383.6**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.4	£0.8	£13.8	£18.2
Charlton			£2.2	£0.5	£2.9	£0.1	£0.1	£1.1	£6.9
Dartford			£1.1	£3.6	£1.0	£5.8	£9.6	£2.0	£23.1
Eltham			£0.0	£0.0	£3.3	£0.8	£0.7	£7.3	£12.1
Lakeside			£2.1	£2.2	£4.1	£2.3	£1.5	£3.3	£15.5
Bluewater			£14.6	£31.4	£40.0	£25.2	£22.9	£44.3	£178.5
Greenhithe			£1.3	£0.1	£1.9	£0.2	£0.0	£2.5	£6.2
Orpington			£0.9	£1.0	£1.9	£1.6	£2.0	£29.1	£36.5
Thamesmead			£3.2	£0.4	£0.6	£0.1	£0.0	£0.3	£4.6
West End			£0.6	£1.2	£2.3	£0.0	£1.0	£1.0	£6.0
Woolwich			£2.5	£1.2	£0.0	£0.0	£0.0	£0.0	£3.8
All Other Centres/ Stores			£4.9	£0.7	£3.5	£2.6	£1.3	£4.5	£17.5
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£33.9**	**£42.5**	**£62.1**	**£41.3**	**£40.0**	**£109.0**	**£328.9**
	TOTAL MARKET SHARE:		**£91.3**	**£121.9**	**£139.6**	**£102.5**	**£75.8**	**£181.4**	**£712.4**

TABLE 8: 2016 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£102.4**	**£136.7**	**£156.4**	**£114.9**	**£84.9**	**£203.2**	**£798.4**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE**:**		£2.0	£1.9	£0.3	£0.3	£0.0	£0.0	£4.5
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE**:**		£1.1	£5.9	£1.4	£0.7	£2.7	£0.1	£11.8
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE**:**		£0.2	£4.2	£0.3	£0.2	£0.1	£0.1	£5.2
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE**:**		£0.6	£1.2	£12.5	£1.3	£0.1	£1.5	£17.2
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE**:**		£34.0	£41.0	£41.9	£43.0	£17.6	£29.6	£207.1
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE**:**		£0.6	£5.0	£1.4	£3.2	£3.8	£5.4	£19.4
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE**:**		£0.0	£0.1	£0.0	£0.3	£0.9	£0.0	£1.2
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE**:**		£0.4	£0.7	£1.6	£0.3	£1.6	£17.7	£22.3
ZONE 6:	**BLACKFEN** DISTRICT CENTRE**:**		£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.8
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.6
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.4	£0.0	£0.4	£0.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£22.8	£21.1	£19.7	£14.8	£2.7	£1.0	£82.1
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.5
ZONE 5:	**CRAYFORD**	Tower Retail Park	£2.0	£7.3	£5.1	£3.2	£5.1	£10.9	£33.7
ZONE 6:	**SIDCUP**	Crittals Corner	£0.3	£0.2	£2.6	£0.7	£5.6	£12.0	£21.4
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£64.3**	**£89.0**	**£86.8**	**£68.6**	**£40.1**	**£81.1**	**£429.8**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.6	£0.1	£0.5	£2.7	£0.9	£15.4	£20.4
Charlton			£2.5	£0.5	£3.3	£0.1	£0.2	£1.2	£7.7
Dartford			£1.2	£4.0	£1.1	£6.5	£10.7	£2.2	£25.8
Eltham			£0.0	£0.0	£3.7	£0.8	£0.8	£8.1	£13.6
Lakeside			£2.3	£2.4	£4.6	£2.6	£1.7	£3.7	£17.4
Bluewater			£16.4	£35.2	£44.9	£28.3	£25.6	£49.6	£200.1
Greenhithe			£1.5	£0.1	£2.1	£0.3	£0.0	£2.8	£6.9
Orpington			£1.0	£1.2	£2.1	£1.8	£2.3	£32.6	£40.8
Thamesmead			£3.6	£0.5	£0.7	£0.2	£0.0	£0.3	£5.2
West End			£0.6	£1.4	£2.5	£0.0	£1.1	£1.1	£6.7
Woolwich			£2.9	£1.4	£0.0	£0.0	£0.0	£0.0	£4.3
All Other Centres/ Stores			£5.5	£0.8	£3.9	£3.0	£1.4	£5.0	£19.6
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£38.0**	**£47.7**	**£69.6**	**£46.3**	**£44.8**	**£122.2**	**£368.6**
	TOTAL MARKET SHARE:		**£102.4**	**£136.7**	**£156.4**	**£114.9**	**£84.9**	**£203.2**	**£798.4**

TABLE 9: 2021 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£121.4**	**£161.9**	**£185.1**	**£136.2**	**£100.6**	**£240.7**	**£945.9**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£2.4	£2.2	£0.3	£0.3	£0.0	£0.0	£5.4
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£1.3	£7.0	£1.6	£0.9	£3.2	£0.1	£14.0
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.3	£5.0	£0.4	£0.2	£0.1	£0.1	£6.1
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£0.7	£1.4	£14.8	£1.5	£0.2	£1.8	£20.4
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£40.3	£48.6	£49.6	£51.0	£20.9	£35.0	£245.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£0.7	£5.9	£1.7	£3.8	£4.5	£6.4	£23.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.3	£1.0	£0.0	£1.4
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.5	£0.8	£1.9	£0.3	£1.9	£21.0	£26.4
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£2.2
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.6	£0.7
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.5	£0.0	£0.4	£0.9
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£27.0	£25.0	£23.3	£17.5	£3.2	£1.2	£97.2
ZONE 2:	**ERITH**	Madford Retail Park	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.6
ZONE 5:	**CRAYFORD**	Tower Retail Park	£2.4	£8.7	£6.1	£3.8	£6.0	£12.9	£39.9
ZONE 6:	**SIDCUP**	Crittals Corner	£0.4	£0.2	£3.0	£0.9	£6.6	£14.2	£25.3
ZONES 1-6:	**OTHER**		£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.3
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£76.3**	**£105.4**	**£102.7**	**£81.3**	**£47.5**	**£96.0**	**£509.3**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.8	£0.2	£0.6	£3.2	£1.1	£18.3	£24.1
Charlton			£2.9	£0.6	£3.9	£0.1	£0.2	£1.5	£9.2
Dartford			£1.5	£4.7	£1.3	£7.8	£12.7	£2.6	£30.6
Eltham			£0.0	£0.0	£4.4	£1.0	£1.0	£9.6	£16.1
Lakeside			£2.7	£2.9	£5.5	£3.1	£2.0	£4.4	£20.6
Bluewater			£19.5	£41.7	£53.1	£33.6	£30.3	£58.8	£237.0
Greenhithe			£1.8	£0.2	£2.5	£0.3	£0.1	£3.4	£8.2
Orpington			£1.1	£1.4	£2.5	£2.1	£2.7	£38.6	£48.4
Thamesmead			£4.2	£0.6	£0.8	£0.2	£0.0	£0.3	£6.1
West End			£0.7	£1.6	£3.0	£0.0	£1.3	£1.3	£8.0
Woolwich			£3.4	£1.6	£0.1	£0.0	£0.0	£0.0	£5.1
All Other Centres/ Stores			£6.5	£1.0	£4.7	£3.5	£1.7	£5.9	£23.3
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£45.1**	**£56.5**	**£82.4**	**£54.9**	**£53.1**	**£144.7**	**£436.6**
	TOTAL MARKET SHARE:		**£121.4**	**£161.9**	**£185.1**	**£136.2**	**£100.6**	**£240.7**	**£945.9**

TABLE 10: 2026 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
	TOTAL AVAILABLE EXPENDITURE (£ million)		**£149.7**	**£199.4**	**£227.7**	**£167.9**	**£123.8**	**£296.3**	**£1,164.9**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£3.0	£2.8	£0.4	£0.4	£0.0	£0.0	£6.6
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£1.6	£8.6	£2.0	£1.0	£3.9	£0.2	£17.3
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.3	£6.2	£0.5	£0.2	£0.1	£0.2	£7.5
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£0.9	£1.7	£18.2	£1.8	£0.2	£2.2	£25.1
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£49.7	£59.8	£61.0	£62.9	£25.7	£43.1	£302.2
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£0.9	£7.3	£2.1	£4.7	£5.5	£7.8	£28.4
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.1	£0.0	£0.4	£1.3	£0.0	£1.8
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.6	£1.0	£2.3	£0.4	£2.3	£25.8	£32.5
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£2.6	£2.7
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.1	£0.0	£0.7	£0.8
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.6	£0.0	£0.5	£1.1
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£33.3	£30.8	£28.6	£21.6	£3.9	£1.5	£119.8
ZONE 2:	**ERITH**	Madford Retail Park	£0.2	£0.5	£0.0	£0.0	£0.0	£0.1	£0.7
ZONE 5:	**CRAYFORD**	Tower Retail Park	£3.0	£10.7	£7.4	£4.7	£7.4	£15.8	£49.1
ZONE 6:	**SIDCUP**	Crittals Corner	£0.5	£0.3	£3.7	£1.1	£8.1	£17.5	£31.2
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.4
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£94.1**	**£129.9**	**£126.4**	**£100.2**	**£58.5**	**£118.2**	**£627.2**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£0.9	£0.2	£0.8	£4.0	£1.3	£22.5	£29.7
Charlton			£3.6	£0.8	£4.8	£0.1	£0.2	£1.8	£11.3
Dartford			£1.8	£5.8	£1.7	£9.6	£15.6	£3.2	£37.7
Eltham			£0.0	£0.0	£5.5	£1.2	£1.2	£11.8	£19.8
Lakeside			£3.4	£3.6	£6.7	£3.8	£2.5	£5.4	£25.3
Bluewater			£24.0	£51.4	£65.3	£41.4	£37.4	£72.4	£291.8
Greenhithe			£2.2	£0.2	£3.1	£0.4	£0.1	£4.1	£10.1
Orpington			£1.4	£1.7	£3.0	£2.6	£3.3	£47.5	£59.6
Thamesmead			£5.2	£0.7	£1.0	£0.2	£0.0	£0.4	£7.6
West End			£0.9	£2.0	£3.7	£0.0	£1.6	£1.6	£9.8
Woolwich			£4.2	£2.0	£0.1	£0.0	£0.0	£0.0	£6.3
All Other Centres/ Stores			£8.0	£1.2	£5.7	£4.3	£2.1	£7.3	£28.7
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£55.6**	**£69.6**	**£101.3**	**£67.7**	**£65.4**	**£178.1**	**£537.6**
	TOTAL MARKET SHARE:		**£149.7**	**£199.4**	**£227.7**	**£167.9**	**£123.8**	**£296.3**	**£1,164.9**

TABLE 11: 2031 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	**£184.4**	**£245.7**	**£280.4**	**£207.0**	**£152.5**	**£364.7**	**£1,434.8**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£3.6	£3.4	£0.5	£0.5	£0.0	£0.1	£8.1
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£1.9	£10.6	£2.5	£1.3	£4.8	£0.2	£21.3
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.4	£7.6	£0.6	£0.3	£0.1	£0.2	£9.3
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£1.1	£2.1	£22.4	£2.3	£0.2	£2.8	£30.9
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£61.3	£73.7	£75.1	£77.5	£31.7	£53.0	£372.4
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.1	£9.0	£2.6	£5.8	£6.8	£9.7	£34.9
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.5	£1.6	£0.0	£2.2
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£0.8	£1.3	£2.8	£0.5	£2.8	£31.8	£40.0
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£3.2	£3.3
NEIGHBOURHOOD CENTRES:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.2	£0.0	£0.9	£1.0
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.8	£0.0	£0.6	£1.4
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£41.1	£38.0	£35.3	£26.6	£4.8	£1.8	£147.6
ZONE 2:	**ERITH**	Madford Retail Park	£0.2	£0.6	£0.0	£0.0	£0.0	£0.1	£0.8
ZONE 5:	**CRAYFORD**	Tower Retail Park	£3.7	£13.1	£9.2	£5.8	£9.2	£19.5	£60.5
ZONE 6:	**SIDCUP**	Crittals Corner	£0.6	£0.3	£4.6	£1.3	£10.0	£21.5	£38.4
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.5
BEXLEY BOROUGH - 'RETENTION' LEVEL:			**£115.9**	**£160.0**	**£155.6**	**£123.6**	**£72.0**	**£145.5**	**£772.7**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.2	£0.2	£1.0	£4.9	£1.6	£27.7	£36.6
Charlton			£4.4	£1.0	£5.9	£0.2	£0.3	£2.2	£13.9
Dartford			£2.2	£7.2	£2.0	£11.8	£19.2	£3.9	£46.5
Eltham			£0.0	£0.0	£6.7	£1.5	£1.5	£14.6	£24.3
Lakeside			£4.1	£4.4	£8.3	£4.7	£3.1	£6.6	£31.2
Bluewater			£29.6	£63.3	£80.4	£51.0	£46.0	£89.1	£359.5
Greenhithe			£2.7	£0.3	£3.8	£0.5	£0.1	£5.1	£12.4
Orpington			£1.7	£2.1	£3.7	£3.3	£4.1	£58.5	£73.3
Thamesmead			£6.4	£0.9	£1.3	£0.3	£0.0	£0.5	£9.3
West End			£1.1	£2.4	£4.5	£0.0	£2.0	£2.0	£12.1
Woolwich			£5.1	£2.5	£0.1	£0.0	£0.0	£0.0	£7.7
All Other Centres/ Stores			£9.9	£1.5	£7.1	£5.3	£2.6	£9.0	£35.3
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£68.5**	**£85.7**	**£124.8**	**£83.4**	**£80.5**	**£219.2**	**£662.2**
	TOTAL MARKET SHARE:		**£184.4**	**£245.7**	**£280.4**	**£207.0**	**£152.5**	**£364.7**	**£1,434.8**
			£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0

TABLE 12: 2036 MARKET SHARE ANALYSIS (£m) - ALL COMPARISON GOODS SHOPPING

			ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	TOTAL
		TOTAL AVAILABLE EXPENDITURE (£ million)	**£227.0**	**£302.3**	**£344.8**	**£254.9**	**£187.6**	**£448.3**	**£1,765.0**
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£4.5	£4.2	£0.6	£0.6	£0.0	£0.1	£10.0
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£2.4	£13.0	£3.1	£1.6	£5.9	£0.2	£26.2
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£0.5	£9.4	£0.7	£0.4	£0.2	£0.3	£11.4
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£1.4	£2.6	£27.6	£2.8	£0.3	£3.4	£38.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£75.4	£90.7	£92.3	£95.5	£38.9	£65.2	£458.1
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£1.4	£11.1	£3.2	£7.2	£8.3	£11.9	£43.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£0.0	£0.2	£0.0	£0.6	£1.9	£0.0	£2.7
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£1.0	£1.6	£3.5	£0.6	£3.5	£39.1	£49.2
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£0.0	£0.0	£0.1	£0.0	£0.0	£4.0	£4.0
ZONE 1:									
ZONE 1:	ABBEY WOOD		£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
ZONES 1-6:	OTHER CENTRES:		£0.0	£0.0	£0.0	£0.2	£0.0	£1.1	£1.3
ALL OTHER LOCAL STORES			£0.0	£0.0	£0.0	£0.9	£0.0	£0.8	£1.7
ZONE 1:									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£50.6	£46.7	£43.4	£32.8	£6.0	£2.2	£181.6
ZONE 2:	**ERITH**	Madford Retail Park	£0.2	£0.7	£0.0	£0.0	£0.0	£0.1	£1.0
ZONE 5:	**CRAYFORD**	Tower Retail Park	£4.5	£16.2	£11.3	£7.2	£11.3	£24.0	£74.4
ZONE 6:	**SIDCUP**	Crittals Corner	£0.7	£0.4	£5.7	£1.6	£12.3	£26.5	£47.2
ZONES 1-6:	**OTHER**		£0.0	£0.2	£0.0	£0.3	£0.0	£0.2	£0.6
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£142.7**	**£196.9**	**£191.4**	**£152.2**	**£88.6**	**£178.8**	**£950.5**
OTHER CENTRES AND STORES OUTSIDE BOROUGH									
Bromley			£1.4	£0.3	£1.2	£6.0	£2.0	£34.0	£45.0
Charlton			£5.4	£1.2	£7.2	£0.2	£0.3	£2.7	£17.1
Dartford			£2.8	£8.9	£2.5	£14.5	£23.7	£4.8	£57.2
Eltham			£0.0	£0.0	£8.3	£1.9	£1.9	£17.9	£29.9
Lakeside			£5.1	£5.4	£10.2	£5.8	£3.8	£8.1	£38.4
Bluewater			£36.4	£77.9	£98.9	£62.8	£56.6	£109.5	£442.1
Greenhithe			£3.3	£0.3	£4.7	£0.6	£0.1	£6.3	£15.3
Orpington			£2.1	£2.6	£4.6	£4.0	£5.0	£71.9	£90.2
Thamesmead			£7.9	£1.1	£1.6	£0.3	£0.0	£0.6	£11.5
West End			£1.4	£3.0	£5.6	£0.0	£2.5	£2.4	£14.9
Woolwich			£6.3	£3.0	£0.1	£0.0	£0.0	£0.0	£9.5
All Other Centres/ Stores			£12.1	£1.8	£8.7	£6.6	£3.2	£11.1	£43.4
SUB-TOTAL-OUTSIDE BOROUGH AREA			**£84.3**	**£105.5**	**£153.5**	**£102.7**	**£99.0**	**£269.5**	**£814.5**
	TOTAL MARKET SHARE:		**£227.0**	**£302.3**	**£344.8**	**£254.9**	**£187.6**	**£448.3**	**£1,765.0**

TABLE 13: MARKET SHARE ANALYSIS: TOTAL EXPENDITURE ALLOCATED TO STORES/CENTRES FROM STUDY AREA (i.e. excluding 'inflow')

			TOTAL ALLOCATED EXPENDITURE (FROM STUDY AREA ONLY) £m					
			2015	2016	2021	2026	2031	
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		£4.0	£4.5	£5.4	£6.6	£8.1	£10.0
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		£10.6	£11.8	£14.0	£17.3	£21.3	£26.2
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		£4.6	£5.2	£6.1	£7.5	£9.3	£11.4
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		£15.4	£17.2	£20.4	£25.1	£30.9	£38.0
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		£184.8	£207.1	£245.4	£302.2	£372.4	£458.1
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		£17.3	£19.4	£23.0	£28.4	£34.9	£43.0
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		£1.1	£1.2	£1.4	£1.8	£2.2	£2.7
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		£19.9	£22.3	£26.4	£32.5	£40.0	£49.2
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		£1.6	£1.8	£2.2	£2.7	£3.3	£4.0
NEIGHBOURHOOD CENTRES:								
ZONE 1:	**ABBEY WOOD**		£0.0	£0.0	£0.0	£0.1	£0.1	£0.1
ZONES 1-6:	**OTHER CENTRES:**		£0.5	£0.6	£0.7	£0.8	£1.0	£1.3
ALL OTHER LOCAL STORES			£0.7	£0.8	£0.9	£1.1	£1.4	£1.7
EDGE & OUT-OF-CENTRE STORES/SCHEMES								
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	£73.2	£82.1	£97.2	£119.8	£147.6	£181.6
ZONE 2:	**ERITH**	Madford Retail Park	£0.4	£0.5	£0.6	£0.7	£0.8	£1.0
ZONE 5:	**CRAYFORD**	Tower Retail Park	£30.0	£33.7	£39.9	£49.1	£60.5	£74.4
ZONE 6:	**SIDCUP**	Crittals Corner	£19.1	£21.4	£25.3	£31.2	£38.4	£47.2
ZONES 1-6:	**OTHER**		£0.3	£0.3	£0.3	£0.4	£0.5	£0.6
BOROUGH TOTAL			**£383.6**	**£429.8**	**£509.3**	**£627.2**	**£772.7**	**£950.5**

Derived from Tables 7-12

TABLE 14: TOTAL (SURVEY DERIVED) 'POTENTIAL' TURNOVER (including estimated 'inflow' from outside study area)

			ESTIMATED 'INFLOW'	TOTAL FORECAST TURNOVER (£ million)					
				2015	2016	2021	2026	2031	2036
ZONE 1:	**BELVEDERE** DISTRICT CENTRE:		5%	£4.2	£4.8	£5.6	£6.9	£8.6	£10.5
ZONE 2:	**ERITH** MAJOR DISTRICT CENTRE:		25%	£14.1	£15.8	£18.7	£23.0	£28.4	£34.9
ZONE 2:	**NORTHUMBERLAND HEATH** DISTRICT CENTRE:		5%	£4.9	£5.4	£6.5	£7.9	£9.8	£12.0
ZONE 3:	**WELLING** MAJOR DISTRICT CENTRE:		25%	£20.5	£23.0	£27.2	£33.5	£41.2	£50.7
ZONE 4:	**BEXLEYHEATH** STRATEGIC CENTRE:		25%	£246.4	£276.1	£327.2	£403.0	£496.5	£610.8
ZONE 5:	**CRAYFORD** MAJOR DISTRICT CENTRE:		25%	£23.1	£25.9	£30.7	£37.8	£46.6	£57.3
ZONE 5:	**BEXLEY VILLAGE** DISTRICT CENTRE:		25%	£1.4	£1.6	£1.9	£2.3	£2.9	£3.5
ZONE 6:	**SIDCUP** MAJOR DISTRICT CENTRE:		40%	£33.1	£37.1	£44.0	£54.1	£66.6	£81.9
ZONE 6:	**BLACKFEN** DISTRICT CENTRE:		10%	£1.8	£2.0	£2.4	£3.0	£3.6	£4.5
NEIGHBOURHOOD CENTRES:									
ZONE 1:	**ABBEY WOOD**		50%	£0.1	£0.1	£0.1	£0.1	£0.1	£0.2
ZONES 1-6:	**OTHER CENTRES:**		10%	£0.6	£0.6	£0.8	£0.9	£1.2	£1.4
ALL OTHER LOCAL STORES			5%	£0.7	£0.8	£1.0	£1.2	£1.5	£1.8
EDGE & OUT-OF-CENTRE STORES/SCHEMES									
ZONE 1:	**BELVEDERE**	Lower Rd/Picardy Manor Way	20%	£91.5	£102.6	£121.6	£149.7	£184.5	£227.0
ZONE 2:	**ERITH**	Madford Retail Park	35%	£0.6	£0.7	£0.9	£1.1	£1.3	£1.6
ZONE 5:	**CRAYFORD**	Tower Retail Park	40%	£50.1	£56.1	£66.5	£81.8	£100.8	£124.0
ZONE 6:	**SIDCUP**	Crittals Corner	50%	£38.2	£42.8	£50.6	£62.3	£76.8	£94.4
ZONES 1-6:	**OTHER**		15%	£0.3	£0.3	£0.4	£0.5	£0.6	£0.7
BOROUGH TOTAL				**£531.6**	**£595.8**	**£705.9**	**£869.3**	**£1,070.9**	**£1,317.3**

Notes: ! The 'inflow' of expenditure to the Borough's centres and stores from outside the study area has been informed by analysis of the trade draw patterns identified by the 2008 joint Greenwich and Bexley Retail Capacity Study which covered a wider study area, and also by CJ's judgements based on the the location, scale and quality of all existing stores/floorspace in the LB Bexley

TABLE 15: NEW COMPARISON RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	2015	2016	2021	2026	2031	2036
ZONE 1 - BELVEDERE							
Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre: !	In centre	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
No named operator - Imperial Gateway, Belvedere:	Out of Centre	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
Retail units - Southmere Village, Tavy Bridge, Thamemead:	Local shops	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
ZONE 2 - ERITH							
Retail units - Howbury Centre, Slade Green: !	Out of Centre	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
ZONE 3 - WELLING							
Retail units - 21-27 Upper Wickham Lane, Welling District Centre: !	In Centre	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
ZONE 4 - BEXLEYHEATH							
Tesco - Bexleyheath Major Centre: !	In Centre	£22.4	£24.8	£27.6	£30.8	£31.5	£35.1
Lidl - The Broadway, Bexleyheath Major Centre:	In Centre	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
ZONE 5 - CRAYFORD							
Retail units, Crayford Town Hall: !	In Centre	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
Crayford Retail Park		£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
ZONE 6 - SIDCUP							
Retail units - Christopher House, Sidcup:	Neighbourhood Centre	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
TOTAL:		**£42.1**	**£46.6**	**£51.9**	**£57.8**	**£59.1**	**£65.9**

TABLE 16a: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT

ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	53.8%	53.8%	53.8%	53.8%	53.8%	53.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£383.6	£429.8	£509.3	£627.2	£772.7	£950.5
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	28%	28%	28%	28%	28%	28%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£148.1	£165.9	£196.6	£242.1	£298.2	£366.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£531.6	£595.8	£705.9	£869.3	£1,070.9	£1,317.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£531.6	£543.9	£600.5	£669.5	£746.5	£832.3
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£51.9	£105.4	£199.8	£324.4	£485.1
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£42.1	£46.6	£51.9	£57.8	£59.1	£65.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£42.1**	**£5.3**	**£53.6**	**£142.0**	**£265.3**	**£419.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	**-7,017**	**863**	**7,902**	**18,791**	**31,493**	**44,627**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-10,025	1,233	11,289	26,845	44,990	63,753

STEP 1: ! Total available expenditure derived from Table 3.

STEP 2: ! Retention level (%) for the study area at the base year (2015) derived from revised market shares in Table 7a. Assume constant market shares over the forecast period.

STEP 3: ! Retention level (£m) over the forecast period derived from Tables 7b, 8-12, assuming constant market shares.

STEPS 4&5: ! Estimated 'inflow' (% and £m) from outside the study area is based on the best available evidence, including the market share and trade draw analysis identified by the 2008 GVA Joint Retail Study, other published retail assessments in support of planning applications, healthchecks and other survey evidence.

STEP 6: ! Total forecast 'potential' turnover has been informed by the (survey-derived) market share analysis (Steps 2 & 3) and the estimated 'inflow' of expenditure from outside the study area (Steps 4 & 5).

STEP 7: ! For the purpose of this assessment it has been assumed that the comparison goods retail market is in 'equilibrium' at the base year (i.e. the 'benchmark' turnover of all identified comparison goods floorspace is equivalent to the 'potential' turnover forecast). It is therefore assumed that existing floorspace is not 'under' or 'over' trading based on the avaialable evidence. An allowance has then been made for the growth in 'productivity' ('efficiency') of all existing and new comparison goods floorspace, informed by Experian's latest growth forecasts and current research. Experian's annual average growth rate ranges from 2% to 3.8% over the forecast period.

STEP 8: ! The forecast residual expenditure capacity (pre commitments) has been derived by deducting the forecast growth in 'potential' turnover levels (Steps 6) from the estimated 'benchmark' turnover levels (Step 7).

STEP 9: ! This step makes an allowance for all major comparison goods floorspace retail commitments at the base year (i.e. with planning permission, under construction or recently opened after the household survey was conducted).

STEP 10: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 8 minus Step 9)). !

STEP 11: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace.

TABLE 16b: LONDON BOROUGH OF BEXLEY - COMPARISON GOODS CAPACITY ASSESSMENT - DISCOUNTING TESCO BEXLEYHEATH

ASSUMES EQUILIBRIUM AT THE BASE YEAR & CONSTANT 'RETENTION LEVEL' & 'INFLOW' OVER THE FORECAST PERIOD

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE (£m):**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	53.8%	53.8%	53.8%	53.8%	53.8%	53.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£383.6	£429.8	£509.3	£627.2	£772.7	£950.5
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	27.9%	27.9%	27.9%	27.9%	27.9%	27.9%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£148.1	£165.9	£196.6	£242.1	£298.2	£366.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£531.6	£595.8	£705.9	£869.3	£1,070.9	£1,317.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£531.6	£543.9	£600.5	£669.5	£746.5	£832.3
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£51.9	£105.4	£199.8	£324.4	£485.1
STEP 9:	**COMMITTED FLOORSPACE TURNOVER (£m):**	£19.7	£21.8	£24.3	£27.1	£27.7	£30.8
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£19.7**	**£30.1**	**£81.2**	**£172.8**	**£296.8**	**£454.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,284	4,904	11,975	22,864	35,226	48,361
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-4,692	7,006	17,107	32,663	50,323	69,087

TABLE 17a: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	25.9%	25.9%	25.9%	25.9%	25.9%	25.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£184.79	£207.10	£245.40	£302.24	£372.36	£458.10
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£61.6	£69.0	£81.8	£100.7	£124.1	£152.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£246.4	£276.1	£327.2	£403.0	£496.5	£610.8
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£246.4	£252.1	£278.3	£310.3	£345.9	£385.7
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£24.1	£48.9	£92.7	£150.5	£225.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£23.0	£25.4	£28.3	£31.6	£32.2	£36.0
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£23.0**	**-£1.4**	**£20.6**	**£61.1**	**£118.3**	**£189.1**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECAST:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-3,828	-221	3,041	8,093	14,040	20,137
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-5,468	-316	4,344	11,561	20,058	28,767

TABLE 17b: BEXLEYHEATH STRATEGIC CENTRE: FLOORSPACE CAPACITY FORECASTS - DISCOUNTING TESCO BEXLEYHEATH

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	25.9%	25.9%	25.9%	25.9%	25.9%	25.9%
STEP 3:	**'RETENTION' LEVEL (£m):**	£184.79	£207.10	£245.40	£302.24	£372.36	£458.10
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	28%	28%	28%	28%	28%	28%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£61.6	£69.0	£81.8	£100.7	£124.1	£152.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£246.4	£276.1	£327.2	£403.0	£496.5	£610.8
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£246.4	£252.1	£278.3	£310.3	£345.9	£385.7
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£24.1	£48.9	£92.7	£150.5	£225.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£0.6**	**£23.4**	**£48.2**	**£91.9**	**£149.7**	**£224.2**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-94	3,820	7,114	12,166	17,774	23,870
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-135	5,457	10,163	17,380	25,391	34,100

TABLE 18: CRAYFORD MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	6.7%	6.7%	6.7%	6.7%	6.7%	6.7%
STEP 3:	**'RETENTION' LEVEL (£m):**	£47.38	£53.10	£62.91	£77.46	£95.41	£117.36
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	35%	35%	35%	35%	35%	35%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£25.8	£28.9	£34.3	£42.2	£52.0	£63.9
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£73.2	£82.0	£97.2	£119.7	£147.4	£181.3
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£73.2	£74.9	£82.7	£92.2	£102.8	£114.6
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£7.1	£14.5	£27.5	£44.6	£66.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Retail units, Crayford Town Hall, Crayford:	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
	Crayford Retail Park - Roman Road, Crayford:	£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£7.6**	**-£1.2**	**£5.2**	**£17.1**	**£34.0**	**£54.8**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-1,261	-201	763	2,261	4,034	5,839
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-1,802	-288	1,091	3,230	5,763	8,341

Notes: Turnover forecasts include Tower Retail Park

TABLE 19: ERITH MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
STEP 3:	**'RETENTION' LEVEL (£m):**	£10.56	£11.84	£14.02	£17.27	£21.28	£26.18
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£3.5	£3.9	£4.7	£5.8	£7.1	£8.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£14.1	£15.8	£18.7	£23.0	£28.4	£34.9
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£14.1	£14.4	£15.9	£17.7	£19.8	£22.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£1.4	£2.8	£5.3	£8.6	£12.9
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.4**	**£2.8**	**£5.3**	**£8.6**	**£12.9**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	0	224	412	700	1,021	1,369
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	0	320	589	1,001	1,458	1,956

TABLE 20: WELLING MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	2.2%	2.2%	2.2%	2.2%	2.2%	2.2%
STEP 3:	**'RETENTION' LEVEL (£m):**	£15.37	£17.23	£20.40	£25.10	£30.92	£38.02
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	25%	25%	25%	25%	25%	25%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£5.1	£5.7	£6.8	£8.4	£10.3	£12.7
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£20.5	£23.0	£27.2	£33.5	£41.2	£50.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£20.5	£21.0	£23.2	£25.8	£28.8	£32.1
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£2.0	£4.0	£7.7	£12.4	£18.6
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.2**	**£0.7**	**£2.6**	**£6.0**	**£10.8**	**£16.7**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	-198	111	381	797	1,278	1,783
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	-283	159	544	1,139	1,826	2,547

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TABLE 21: SIDCUP MAJOR DISTRICT CENTRE: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£19.9	£22.3	£26.4	£32.5	£40.0	£49.2
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	40%	40%	40%	40%	40%	40%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£13.3	£14.8	£17.6	£21.7	£26.7	£32.8
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£33.1	£37.1	£44.0	£54.1	£66.6	£81.9
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£33.1	£33.9	£37.4	£41.7	£46.5	£51.9
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£3.2	£6.6	£12.4	£20.1	£30.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£3.2**	**£6.6**	**£12.4**	**£20.1**	**£30.1**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
(ii)	Net Floorspace Capacity (sq m):	0	526	967	1,643	2,388	3,200
(iii)	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv)	Gross Floorspace Capacity (sq m):	0	752	1,381	2,347	3,412	4,571

TABLE 22: BELVEDERE AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	10.8%	10.8%	10.8%	10.8%	10.8%	10.8%
STEP 3:	**'RETENTION' LEVEL (£m):**	£77.3	£86.6	£102.6	£126.4	£155.8	£191.7
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	19%	19%	19%	19%	19%	19%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£18.6	£20.8	£24.6	£30.3	£37.4	£46.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£95.8	£107.4	£127.3	£156.8	£193.2	£237.7
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£95.8	£98.0	£108.2	£120.7	£134.6	£150.0
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£9.4	£19.0	£36.1	£58.6	£87.7
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Sainsbury's - Cross Quarter, Abbeywood Neighbourhood Centre:	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
	No named operator - Imperial Gateway, Belvedere:	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
	Retail units - Southmere Village, Tavy Bridge, Thamemead:	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£8.9**	**-£0.4**	**£8.1**	**£23.9**	**£46.2**	**£73.8**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-1,477	-73	1,198	3,166	5,482	7,858
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-2,111	-105	1,712	4,522	7,831	11,226

Notes: Turnover forecasts include Belvedere District Centre, Abbey Wood Neighbourhood Centre & Lower Road/Picardy Manorway

TABLE 23: REST OF STUDY AREA: FLOORSPACE CAPACITY FORECASTS

		2015	2016	2021	2026	2031	2036
STEP 1:	**TOTAL AVAILABLE EXPENDITURE IN STUDY AREA:**	£712.4	£798.4	£945.9	£1,164.9	£1,434.8	£1,765.0
STEP 2:	**'RETENTION' LEVEL (%):**	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
STEP 3:	**'RETENTION' LEVEL (£m):**	£28.3	£31.7	£37.5	£46.2	£56.9	£70.0
STEP 4:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (%):**	42%	42%	42%	42%	42%	42%
STEP 5:	**ESTIMATED 'INFLOW' FROM OUTSIDE STUDY AREA (£m):**	£20.2	£22.7	£26.8	£33.0	£40.7	£50.0
STEP 6:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):**	£48.5	£54.4	£64.4	£79.3	£97.6	£120.0
STEP 7:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):**	£48.5	£49.6	£54.8	£61.1	£68.1	£75.9
STEP 8:	**TOTAL FORECAST RESIDUAL EXPENDITURE:**	£0.0	£4.7	£9.6	£18.2	£29.5	£44.1
STEP 9:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£m):**						
	Retail units - Howbury Centre, Slade Green (Zone 2):	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
	Retail units - Christopher House, Sidcup (Zone 6):	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
STEP 10:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-£1.5**	**£3.1**	**£7.7**	**£16.1**	**£27.4**	**£41.7**
STEP 11:	**NEW COMPARISON GOODS FLOORSPACE CAPACITY FORECASTS:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,138	£6,777	£7,556	£8,424	£9,393
	(ii) Net Floorspace Capacity (sq m):	-253	498	1,140	2,131	3,250	4,442
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-361	711	1,629	3,045	4,642	6,345

Notes: Rest of Study Area includes turnover from smaller District Centres and local shops/ centres in Zones 2 to 6, as well as out of centre retail parks; including Madford Retail Park in Erith and Crittals Co

APPENDIX 6: COMMITTED RETAIL FLOORSPACE

TABLE 1: NEW RETAIL FLOORSPACE COMMITMENTS SINCE 2013 (incl. recently opened, with planning permission and/or under construction)

	Location	Gross Area	Estimated Sales Area	Average Sales Density	Catchment Retention	2015	2020	2025	2030	2031	2036
		(m^2)	(m^2 net)	(£ per m^2)							
SAINSBURY'S - CROSS QUARTER, ABBEY WOOD [1]:	NEIGHBOURHOOD CENTRE EXTENSION										
Convenience:		-	3,242	£13,200	50%	£21.4	£21.1	£21.2	£21.3	£21.3	£21.4
Comparison:		-	1,272	£8,000	50%	£5.1	£5.6	£6.3	£7.0	£7.1	£8.0
TOTAL:		**8,451**	**4,514**			**£26.5**	**£26.8**	**£27.5**	**£28.3**	**£28.5**	**£29.4**
TESCO - BEXLEYHEATH [2]:	IN CENTRE										
Convenience:		-	3,700	£11,500	80%	£34.0	£33.6	£33.7	£33.9	£33.9	£34.1
Comparison:		-	3,500	£8,000	80%	£22.4	£24.8	£27.6	£30.8	£31.5	£35.1
TOTAL:		**-**	**7,200**			**£56.4**	**£58.4**	**£61.3**	**£64.6**	**£65.4**	**£69.1**
LIDL - THE BROADWAY, BEXLEYHEATH:	IN CENTRE										
Convenience:		-	944	£3,900	80%	£2.9	£2.9	£2.9	£2.9	£2.9	£2.9
Comparison:		-	236	£3,000	80%	£0.6	£0.6	£0.7	£0.8	£0.8	£0.9
TOTAL:		**-**	**1,180**			**£3.5**	**£3.5**	**£3.6**	**£3.7**	**£3.7**	**£3.8**
NO NAMED OPERATOR - IMPERIAL GATEWAY (3):	OUT OF CENTRE										
Convenience:		-	1,540	£5,000	80%	£6.2	£6.1	£6.1	£6.1	£6.1	£6.2
Comparison:		-	385	£3,000	80%	£0.9	£1.0	£1.1	£1.3	£1.3	£1.4
TOTAL:		**-**	**1,925**			**£7.1**	**£7.1**	**£7.2**	**£7.4**	**£7.4**	**£7.6**
CRAYFORD RETAIL PARK - ROMAN ROAD, CRAYFORD (4):	IN CENTRE										
Convenience:		-	-	-		-	-	-	-	-	
Comparison:		3,000	1,950	£4,000	80%	£6.2	£6.9	£7.7	£8.6	£8.8	£9.8
TOTAL:		**3,000**	**1,950**			**£6.2**	**£6.9**	**£7.7**	**£8.6**	**£8.8**	**£9.8**
RETAIL UNIT - CHRISTOPHER HOUSE, SIDCUP	NEIGHBOURHOOD CENTRE										
Convenience:		-									
Comparison:		376.6	264	£4,000	80%	£0.8	£0.9	£1.0	£1.2	£1.2	£1.3
TOTAL:		**-**	**264**			**£0.8**	**£0.9**	**£1.0**	**£1.2**	**£1.2**	**£1.3**
NO NAMED OPERATOR - 21-27 UPPER WICKHAM LANE, WELLING	IN CENTRE										
Convenience:											
Comparison:		531	372	£4,000	80%	£1.2	£1.3	£1.5	£1.6	£1.7	£1.9
TOTAL:		**-**	**372**			**£1.2**	**£1.3**	**£1.5**	**£1.6**	**£1.7**	**£1.9**
NO NAMED OPERATOR - SOUTHMERE VILLAGE, TAVY BRIDGE, THAMESMEAD	LOCAL SHOPS										
Convenience:		566	396	£5,500	80%	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
Comparison:		566	396	£4,000	180%	£2.9	£3.2	£3.5	£3.9	£4.0	£4.5
TOTAL:		**-**	**792**			**£4.6**	**£4.9**	**£5.2**	**£5.7**	**£5.7**	**£6.2**
RETAIL UNITS, CRAYFORD TOWN HALL	IN CENTRE										
Convenience:		-									
Comparison:		593	415	£4,000	80%	£1.3	£1.5	£1.6	£1.8	£1.9	£2.1
TOTAL:		**-**	**415**			**£1.3**	**£1.5**	**£1.6**	**£1.8**	**£1.9**	**£2.1**
RETAIL UNITS, HOWBURY CENTRE, SLADE GREEN	OUT OF CENTRE										
Convenience:		-									
Comparison:		300	210	£4,000	80%	£0.7	£0.7	£0.8	£0.9	£0.9	£1.1
TOTAL:		**-**	**210**			**£0.7**	**£0.7**	**£0.8**	**£0.9**	**£0.9**	**£1.1**

Notes: The average sales density estimates (£ per sq m) for all named foodstore operators and non-food retail floorspace have been informed by the best and most robust available evidence; including retail assessments submitted in support of the planning applications (see below) and published information on company average turnover levels, where available. The 'benchmark' turnover levels at the base year (2015) have been derived by multiplying sales areas by average turnover levels. The growth in 'benchmark' turnovers over the study period is based on an annual allowance for the increased 'productivity' ('efficiency') of all commited convenience goods floorspace (of +0.5% per annum) and comparison goods retailing (+1.5% per annum) based on the latest available forecasts and research by Experian and other research bodies.

[1] The gross and net floor areas and turnover estimates have been informed by the December 2012 retail assessment prepared by Nathaniel Lichfield & Partners (Appendix 9, Table A9.18). The store has a gross area of 8,451 sqm (7,566 sqm GIA excluding atrium), to be served by 304 parking spaces at ground floor level beneath the store. The development will be located on land at Harrow Manorway and Felixstow Road and also includes full planning permission for A1-A3 retail, community use, hotel (C1), 31 residential units and a new public square. Outline permission was granted for up to 185 residential units, B1 start-ups, D1 nursery and associated works. NLP assumed Sainsbury's achieves a total convenience turnover of £40.9m in 2017 and a total comparison turnover of £10.9m.

[2] Planning permission granted by London Borough of Bexley on 29th October 2012 for the redevelopment of Bexley Civic Offices within the Town Centre Boundary of Bexleyheath for a large foodstore (A1), 3 retail/restaurant/cafe units (A1 and/or A3), community use (D1) and 494 parking spaces (reference: 11/01998/FULM). Sales area and turnover estimates for Tesco store informed by Town Centre & Retail Statement (TCRS) prepared by Nathaniel Lichfield & Partners (NLP, December 2011), as set out in Table A5.10 (Appendix 5).

[3] Outline permission originally granted for 743 sqm food retail, 604 sqm non-food retail and 384 sqm of A2/B1 use at ground level (Block B) with residential above as part of Imperial Gateway scheme (formerly Norman Retail Park), to south of A2016 at junction of Eastern Way, Belvedere (05/02780/OUTM). Permission subsequently granted by London Borough of Bexley in September 2012 for change of use to purely food retail, together with 124 car parking spaces (ref: 12/00267/FUL). The development consolidates extant planning permission for food and non-food retail on the site but did not have a named operator. The *Retail Impact Assessment* prepared by GVA Grimley in December 2011 identified a convenience sales area of 1,925 sqm and a total turnover of £19.25m in 2013 (2009 prices) (Appendix 2, Table 10).

[4] The former "BT Island Site" was subject to outline consent granted in July 2008 for 8 retail units, with 94 car parking spaces, one restaurant with car parking and a riverside walkway (ref: 06/03405/OUTM). A revised planning application was subsequently granted permission by London Borough of Bexley on March 2012 for 4 (Class A1) units with a ground floor area of 3,551 sq m, a mezzanine area of 1,493 sqm for retail/storage, and a further 566 sqm of mezzanine space for storage only. The application also comprised a restaurant (371 sqm) and landscaping, to be served by 119 parking spaces.

APPENDIX 7: LEISURE NEEDS ASSESSMENT

TABLE 1a: POPULATION PROJECTIONS BY ZONE - LOWER POPULATION GROWTH (PH3)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	37,130	45,450	43,534	32,003	23,850	54,329	236,296
2016	37,580	45,476	43,504	32,022	24,383	54,406	237,371
2021	37,487	48,554	43,318	32,014	24,573	54,248	240,196
2026	52,434	53,682	43,712	32,857	25,432	54,492	262,609
2031	66,780	55,892	43,808	33,990	25,785	54,665	280,919
2036	66,098	55,726	43,467	34,282	25,645	54,350	279,567

Source: Population projections from London Borough of Bexley Council

TABLE 1b: POPULATION PROJECTIONS BY ZONE - HIGHER POPULATION GROWTH (PH4)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	37,130	45,804	43,534	32,003	23,850	54,329	236,650
2016	37,580	45,918	43,504	32,022	24,383	54,406	237,814
2021	49,895	51,467	43,318	32,014	24,951	54,248	255,894
2026	69,338	52,956	43,712	32,857	26,040	54,492	279,394
2031	75,706	66,181	43,808	33,990	26,391	54,665	300,740
2036	74,889	65,853	43,467	34,282	26,242	54,350	299,082

Source: Population projections from London Borough of Bexley Council

TABLE 2: COMMERCIAL LEISURE EXPENDITURE PER HEAD BY ZONE (£) - 2013 PRICES

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
Accommodation services	£128	£136	£163	£164	£170	£180	£157
Cultural services	£285	£298	£342	£354	£351	£352	£330
Games of chance	£135	£146	£170	£181	£157	£166	£159
Hairdressing & personal grooming	£74	£77	£114	£119	£105	£123	£103
Recreational & sporting services	£110	£118	£147	£143	£159	£162	£140
Restaurants, cafes etc	£1,056	£1,121	£1,416	£1,434	£1,331	£1,514	£1,322

Source: Average spend per capita estimates for each zone are derived from Experian *'Retail Area Planner' Reports*.

TABLE 3: TOTAL LEISURE EXPENDITURE GROWTH 2011-2029 (%)

	2011	2012	2013	2014	2015	2016-20	2021-36
Expenditure growth per head (%)	-0.6	0	2.1	2.8	1.3	1.1	1.3

Notes: Annual expenditure growth forecasts are informed by Experian's *Retail Planner Briefing Note 12.1 (October 2014).*

TABLE 4: COMMERCIAL LEISURE EXPENDITURE PER HEAD BY ZONE (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£1,876	£1,990	£2,468	£2,514	£2,386	£2,621	£2,321
2016	£1,900	£2,015	£2,500	£2,547	£2,417	£2,655	£2,351
2021	£2,007	£2,129	£2,641	£2,690	£2,553	£2,804	£2,483
2026	£2,141	£2,271	£2,817	£2,870	£2,723	£2,991	£2,649
2031	£2,284	£2,422	£3,005	£3,061	£2,905	£3,190	£2,825
2036	£2,314	£2,454	£3,044	£3,101	£2,942	£3,232	£2,862

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Notes: Commercial leisure expenditure includes spend on cultural services, eating and drinking, sports/health, and games of chance.

TABLE 5a: TOTAL COMMERCIAL LEISURE EXPENDITURE BY ZONE (£M) - LOWER HOUSING GROWTH SCENARIO (PH3)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£69.7	£90.4	£107.5	£80.5	£56.9	£142.4	£547.3
2016	£71.4	£91.7	£108.8	£81.6	£58.9	£144.4	£556.8
2021	£75.2	£103.4	£114.4	£86.1	£62.7	£152.1	£594.0
2026	£112.3	£121.9	£123.1	£94.3	£69.2	£163.0	£683.8
2031	£152.5	£135.4	£131.6	£104.1	£74.9	£174.4	£772.9
2036	£161.0	£144.0	£139.3	£111.9	£79.5	£185.0	£842.6

Source: Expenditure calculated from Tables 1a and 3.

TABLE 5b: TOTAL COMMERCIAL LEISURE EXPENDITURE BY ZONE (£M) - HIGHER HOUSING GROWTH SCENARIO (PH4)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£69.7	£91.1	£107.5	£80.5	£56.9	£142.4	£548.0
2016	£71.4	£92.5	£108.8	£81.6	£58.9	£144.4	£557.7
2021	£100.2	£109.6	£114.4	£86.1	£63.7	£152.1	£626.0
2026	£148.5	£120.3	£123.1	£94.3	£70.9	£163.0	£720.0
2031	£172.9	£160.3	£131.6	£104.1	£76.7	£174.4	£820.0
2036	£182.5	£170.2	£139.3	£111.9	£81.3	£185.0	£901.4

Source: Expenditure calculated from Tables 1b and 3.

TABLE 6: EATING AND DRINKING OUT EXPENDITURE PER HEAD BY ZONE (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£1,108	£1,177	£1,486	£1,506	£1,397	£1,589	£1,387
2016	£1,123	£1,192	£1,505	£1,525	£1,415	£1,610	£1,406
2021	£1,186	£1,259	£1,590	£1,611	£1,495	£1,700	£1,485
2026	£1,265	£1,343	£1,696	£1,718	£1,594	£1,813	£1,584
2031	£1,349	£1,433	£1,809	£1,833	£1,701	£1,934	£1,689
2036	£1,367	£1,451	£1,833	£1,857	£1,723	£1,960	£1,711

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

TABLE 7a: TOTAL EATING AND DRINKING OUT EXPENDITURE BY ZONE (£M) - LOWER HOUSING GROWTH SCENARIO (PH3)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£41.2	£53.5	£64.7	£48.2	£33.3	£86.3	£327.9
2016	£42.2	£54.2	£65.5	£48.8	£34.5	£87.6	£333.6
2021	£44.5	£61.1	£68.9	£51.6	£36.7	£92.2	£356.6
2026	£66.3	£72.1	£74.1	£56.5	£40.5	£98.8	£415.9
2031	£90.1	£80.1	£79.3	£62.3	£43.9	£105.7	£474.5
2036	£95.1	£85.2	£83.9	£67.0	£46.5	£112.1	£503.8

Source: Calculated from Table 1a and 5.

TABLE 7b: TOTAL EATING AND DRINKING OUT EXPENDITURE BY ZONE (£M) - HIGHER HOUSING GROWTH SCENARIO (PH3)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
2015	£41.2	£53.9	£64.7	£48.2	£33.3	£86.3	£328.4
2016	£42.2	£54.7	£65.5	£48.8	£34.5	£87.6	£334.3
2021	£59.2	£64.8	£68.9	£51.6	£37.3	£92.2	£379.9
2026	£87.7	£71.1	£74.1	£56.5	£41.5	£98.8	£442.4
2031	£102.2	£94.8	£79.3	£62.3	£44.9	£105.7	£508.0
2036	£107.8	£100.6	£83.9	£67.0	£47.6	£112.1	£538.9

Source: Calculated from Table 1b and 5.

TABLE 8a: CAPACITY FOR NEW HEALTH AND FITNESS FACILITIES - LOWER POPULATION GROWTH (SCENARIO PH3)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
Population Growth 2015-2036	28,968	10,276	-68	2,278	1,795	21	43,271
Participation Rate (%)	31%	31%	34%	44%	34%	35%	35%
Participation - persons	8870	3205	-23	1012	616	7	14938
Capacity - Key Chain Gym	3	1	0	0	0	0	5
Capacity - Budget Gym	3	1	0	0	0	0	4

Source: Population growth based on the Council's lower housing growth scenario (PH3).
Participation rate identified from the Household Telephone Interview Survey, 2013 RLS.

Notes: Capacity for a new key chain gym(s) is based on an average membership of 2,897 persons per venue.
Capacity for a new budget gym(s) is based on an average membership of 3,452 persons per venue.

TABLE 8b: CAPACITY FOR NEW HEALTH AND FITNESS FACILITIES - HIGHER POPULATION GROWTH (SCENARIO PH4)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Borough
Population Growth 2015-2036	37,759	20,050	-68	2,278	2,392	21	62,432
Participation Rate (%)	31%	31%	34%	44%	34%	35%	35%
Participation - persons	11562	6252	-23	1012	821	7	21552
Capacity - Key Chain Gym	4	2	0	0	0	0	7
Capacity - Budget Gym	3	2	0	0	0	0	6

Source: Population growth based on the Council's higher housing growth scenario (PH4).
Participation rate identified from the Household Telephone Interview Survey, 2013 RLS.

Notes: Capacity for a new key chain gym(s) is based on an average membership of 2,897 persons per venue.
Capacity for a new budget gym(s) is based on an average membership of 3,452 persons per venue.