

BEXLEY RETAIL & LEISURE STUDY: VOLUME 5 APPENDICES

for:

**London Borough
of Bexley**

May 2021



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Signed:

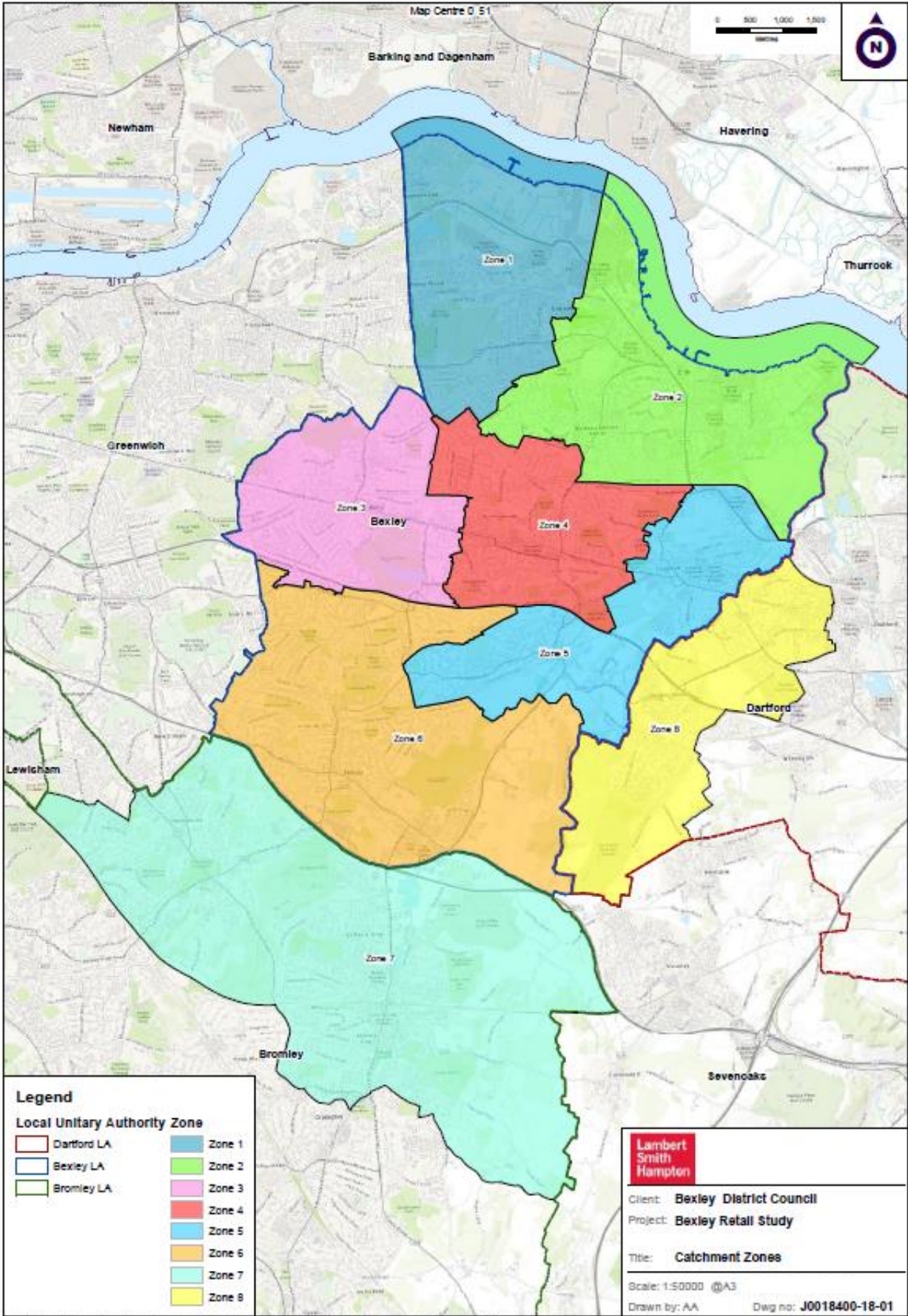
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For and on behalf of Lambert Smith Hampton

VOLUME 5: APPENDICES

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**APPENDIX A1:
DEFINED CATCHMENT AREA & ZONES**



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

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

Including Internet Shopping and other Special Forms of Trading

	ZONES:								TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH AREA Zones 1 to 6
	1	2	3	4	5	6	7	8		
BEXLEYHEATH - STRATEGIC CENTRE										
Asda, The Broadway, Bexleyheath	7.1%	12.9%	12.1%	21.5%	4.5%	6.2%	0.0%	1.3%	8.2%	10.6%
Iceland, Broadway, Bexleyheath	0.0%	0.0%	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
Lidl, Broadway, Bexleyheath	0.0%	0.0%	0.9%	0.3%	3.6%	0.7%	0.4%	0.2%	0.6%	0.7%
Marks & Spencer, Broadway, Bexleyheath	3.6%	2.4%	2.0%	2.3%	2.1%	1.8%	0.0%	0.4%	1.8%	2.3%
Sainsbury's, Broadway, Bexleyheath	5.5%	3.6%	3.3%	3.4%	1.2%	1.3%	0.0%	0.3%	2.3%	3.0%
Other stores in Bexleyheath	0.0%	1.0%	0.1%	0.8%	0.0%	0.2%	0.0%	0.2%	0.3%	0.4%
BEXLEYHEATH: SUB-TOTAL	16.2%	20.0%	18.6%	28.5%	11.3%	10.3%	0.4%	2.3%	13.3%	17.1%
CRAYFORD - MAJOR DISTRICT CENTRE										
Aldi Roman Way, Dartford	0.0%	3.4%	1.2%	5.8%	8.6%	0.8%	0.1%	4.8%	2.4%	2.8%
Iceland, Crayford Road, Crayford	0.0%	0.1%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.1%	0.2%
Sainsbury's, Stadium Way, Crayford	4.6%	10.5%	6.1%	13.6%	28.8%	2.3%	0.0%	18.4%	8.3%	9.3%
Other stores in Crayford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
CRAYFORD: SUB-TOTAL	4.6%	13.9%	7.2%	19.5%	38.7%	3.1%	0.1%	23.5%	10.9%	12.2%
ERITH - MAJOR DISTRICT CENTRE										
Farmfoods, Pier Road, Erith	0.2%	0.6%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Iceland, Town Square, Erith	0.0%	1.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Morrisons, James Watt Way, Erith	11.2%	28.3%	0.4%	7.8%	2.1%	0.0%	0.0%	1.9%	6.5%	8.4%
Local shops, Erith Town Centre	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
ERITH: SUB-TOTAL	11.6%	30.6%	0.4%	8.0%	2.1%	0.0%	0.0%	1.9%	6.9%	8.9%
SIDCUP - MAJOR DISTRICT CENTRE										
Iceland, Sidcup High Street, Sidcup	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.1%	0.0%	0.1%	0.1%
Little Waitrose, High Street, Sidcup	0.0%	0.0%	0.0%	3.6%	0.7%	6.0%	0.1%	0.0%	1.5%	2.0%
Morrisons, Jenner Close, Sidcup	0.0%	0.2%	0.3%	0.1%	0.9%	21.9%	2.1%	0.4%	4.5%	5.4%
Local shops, Sidcup Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.0%	0.2%	0.1%
SIDCUP: SUB-TOTAL	0.0%	0.2%	0.3%	3.7%	1.8%	28.8%	2.8%	0.4%	6.3%	7.6%
WELLING - MAJOR DISTRICT CENTRE										
Iceland, Welling High Street, Welling	0.2%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Lidl, Upper Wickham Lane, Welling	0.2%	0.1%	7.1%	0.1%	0.0%	0.0%	0.0%	0.2%	1.0%	1.3%
Morrisons, Welling High Street, Welling	1.2%	0.3%	15.0%	2.2%	0.1%	0.4%	0.0%	0.4%	2.6%	3.4%
Tesco Superstore, Welling High Street, Welling	0.9%	0.8%	15.2%	1.2%	1.2%	1.9%	0.4%	0.6%	3.0%	3.8%
Local shops, Welling Town Centre	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
WELLING: SUB-TOTAL	2.5%	1.2%	40.2%	3.5%	1.4%	2.3%	0.4%	1.2%	7.0%	9.0%
DISTRICT CENTRES:										
Belvedere (Nuxley Rd) (2)	11.5%	1.9%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	2.1%
Bexley Village (3)	0.0%	0.1%	0.5%	0.0%	2.5%	0.1%	0.0%	0.9%	0.4%	0.4%
Blackfen (4)	0.0%	0.0%	0.6%	0.0%	0.0%	6.8%	0.0%	0.0%	1.3%	1.7%
Northumberland Heath (5)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.01%	0.02%
DISTRICT CENTRES: SUB-TOTAL	11.5%	2.1%	1.2%	0.0%	2.5%	7.0%	0.0%	0.9%	3.3%	4.2%
NEIGHBOURHOOD CENTRES										
	1.3%	10.5%	15.8%	18.1%	11.8%	13.6%	5.8%	4.2%	10.4%	12.0%
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	15.3%	9.8%	0.5%	3.0%	0.5%	0.0%	0.0%	0.0%	3.6%	4.7%
Asda, Crook Log, Bexleyheath	1.2%	0.6%	3.1%	2.4%	3.6%	0.6%	0.0%	2.7%	1.5%	1.7%
Lidl, Eynsham Drive, Abbey Wood	3.2%	0.4%	0.0%	0.8%	0.0%	0.0%	0.1%	0.0%	0.5%	0.7%
Other	0.2%	0.1%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
OUT OF CENTRE: SUB-TOTAL	19.9%	10.8%	3.5%	8.5%	4.1%	0.6%	0.1%	2.7%	5.8%	7.4%
BEXLEY BOROUGH TOTAL RETENTION:										
	67.5%	89.4%	87.1%	89.7%	73.7%	65.6%	9.6%	37.2%	63.8%	78.5%
OUT OF BOROUGH:										
Tesco Superstore, Edgington Way, Foots Cray	0.0%	0.0%	0.9%	0.3%	8.9%	13.0%	10.8%	4.7%	5.4%	4.2%
Sainsbury's, Harow Manor Way, Abbey Wood	8.9%	0.8%	0.8%	0.0%	0.0%	0.1%	0.0%	0.0%	1.2%	1.6%
Bromley	0.0%	0.0%	0.0%	0.3%	0.2%	0.2%	2.1%	0.0%	0.4%	0.1%
Dartford	0.0%	1.8%	0.1%	1.8%	1.3%	0.1%	0.5%	13.6%	1.6%	0.8%
Orpington	0.0%	0.0%	0.0%	0.0%	0.2%	1.4%	37.0%	0.2%	6.7%	0.4%
Thamesmead	19.7%	0.9%	4.2%	1.3%	2.2%	1.1%	0.0%	0.0%	3.4%	4.5%
Other	1.5%	2.5%	2.7%	2.6%	6.3%	12.4%	34.3%	39.7%	12.5%	5.1%
ALL CENTRES / STORES OUTSIDE BOROUGH:	30.2%	6.0%	8.6%	6.3%	19.1%	28.2%	84.7%	58.2%	31.2%	16.7%
INTERNET / SPECIAL FORMS OF TRADING										
	2.4%	4.7%	4.2%	4.0%	7.3%	6.1%	5.7%	4.6%	4.9%	4.8%
TOTAL MARKET SHARE:										
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Household Telephone Survey (June 2018)

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

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

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

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

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

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

**APPENDIX A4:
POPULATION PROJECTIONS &
EXPENDITURE GROWTH**

GLA POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

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

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

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

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

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

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

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

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

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

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million)

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

GLA POPULATION & EXPENDITURE GROWTH FORECASTS, 2021-2038

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

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

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

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

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

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

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

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

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

ZONE:	2018	2021	2026	2031	2038
Zone 1	37,960	39,006	44,001	51,637	66,363
Zone 2	47,585	49,780	54,653	62,060	84,459
Zone 3	44,169	44,135	44,491	45,171	45,398
Zone 4	33,150	33,197	33,922	35,910	36,766
Zone 5	24,568	25,245	25,466	26,205	28,320
Zone 6	55,643	55,726	56,626	57,029	57,454
Zone 7	50,900	51,400	52,000	52,600	54,576
Zone 8	20,491	21,162	22,375	23,267	24,329
TOTAL CATCHMENT AREA:	314,466	319,651	333,534	353,880	397,665

BEXLEY BOROUGH AREA (ZONES 1-6):	243,075	247,089	259,159	278,013	318,760
REST OF CATCHMENT AREA (ZONES 7-8):	71,391	72,562	74,375	75,867	78,905

GROWTH 2021 - 2031:

%	No.
32.4%	12,631
24.7%	12,280
2.3%	1,036
8.2%	2,714
3.8%	960
2.3%	1,303
2.3%	1,200
9.9%	2,105
10.7%	34,229

GROWTH 2021 - 2038:

%	No.
70.1%	27,356
69.7%	34,679
2.9%	1,263
10.8%	3,569
12.2%	3,076
3.1%	1,728
6.2%	3,176
15.0%	3,167
24.4%	78,014

12.5%	30,924
4.6%	3,305

29.0%	71,671
8.7%	6,343

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

Notes: Population projections (2018 to 2036) for Zones 1 to 6 are derived from the London Borough of Bexley Council as informed by the Bexley Growth Strategy. Projections for Zones 7 are based on the GLA's 2016-based projections for London wards. Projections for Zone 8 is obtained from Experian's base year population figures at ward level, sourced by Experian from the ONS (mid-year) population figures.

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

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

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

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

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

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million)

	2018	2018	2021	2026	2031	2038
	INCLUDING SFT	EXCLUDING SPECIAL FORMS OF TRADING				
Zone 1	£78.2	£76.2	£78.0	£87.5	£102.7	£132.5
Zone 2	£100.8	£98.2	£102.3	£111.8	£126.9	£173.5
Zone 3	£96.3	£93.7	£93.3	£93.6	£95.0	£95.9
Zone 4	£74.8	£72.8	£72.6	£73.9	£78.2	£80.4
Zone 5	£57.2	£55.7	£57.0	£57.2	£58.8	£63.9
Zone 6	£125.3	£122.0	£121.7	£123.1	£124.0	£125.4
Zone 7	£124.4	£121.1	£121.8	£122.7	£124.1	£129.3
Zone 8	£47.9	£46.7	£48.0	£50.5	£52.5	£55.1
CATCHMENT AREA	£704.9	£686.3	£694.8	£720.5	£762.3	£855.9

GROWTH 2021 to 2031:

%	£m
31.7%	£24.7
24.1%	£24.6
1.8%	£1.7
7.6%	£5.6
3.3%	£1.9
1.8%	£2.2
1.8%	£2.2
9.4%	£4.5
9.7%	£67.5

GROWTH 2021 to 2038:

%	£m
71.7%	£54.6
72.5%	£71.1
2.8%	£2.6
10.6%	£7.7
12.4%	£6.9
3.0%	£3.7
6.1%	£7.4
15.3%	£7.1
23.5%	£161.2

11.6%	£60.8
4.0%	£6.8

28.3%	£146.6
8.6%	£14.6

BEXLEY BOROUGH COUNCIL AREA (ZONES 1-6):	£518.5	£524.9	£547.2	£585.7	£671.5
REST OF CATCHMENT AREA (ZONES 7-8):	£167.8	£169.8	£173.2	£176.6	£184.4

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

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

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

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

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

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

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

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

**APPENDIX A5:
CONVENIENCE GOODS TURNOVER FORECASTS**

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

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

Notes: Figures may not sum due to rounding

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
All Convenience Goods Expenditure Allocated to Existing Centres, Stores and Shopping Locations by Zone
Excluding Internet Shopping and other Special Forms of Trading

ZONE:	TOTAL AVAILABLE SPEND (excluding SFT)								TOTAL CATCHMENT (STUDY) AREA	BEXLEY BOROUGH
	1	2	3	4	5	6	7	8	Zones 1-8	Zones 1-6
	£78.8	£101.1	£96.4	£74.3	£57.1	£125.5	£121.1	£46.7	£701.0	£533.3
BEXLEYHEATH MAJOR CENTRE										
Asda, The Broadway, Bexleyheath	£5.72	£13.72	£12.13	£16.61	£2.78	£8.34	£0.00	£0.65	£59.94	£59.29
Iceland, Broadway, Bexleyheath	£0.00	£0.00	£0.09	£0.16	£0.00	£0.13	£0.00	£0.00	£0.39	£0.39
Lidl, Broadway, Bexleyheath	£0.00	£0.00	£0.89	£0.25	£2.21	£0.87	£0.48	£0.08	£4.78	£4.22
Marks & Spencer, Broadway, Bexleyheath	£2.88	£2.57	£2.05	£1.79	£1.29	£2.37	£0.00	£0.18	£13.12	£12.94
Sainsbury's, Broadway, Bexleyheath	£4.45	£3.83	£3.37	£2.60	£0.71	£1.72	£0.00	£0.16	£16.83	£16.68
Other stores in Bexleyheath	£0.00	£1.07	£0.15	£0.64	£0.00	£0.30	£0.00	£0.08	£2.23	£2.16
BEXLEYHEATH: SUB-TOTAL	£13.05	£21.18	£18.67	£22.05	£6.98	£13.73	£0.48	£1.14	£97.30	£95.67
CRAYFORD TOWN CENTRE										
Aldi Roman Way, Dartford	£0.00	£3.57	£1.16	£4.52	£5.27	£1.01	£0.14	£2.33	£18.02	£15.54
Iceland, Crayford Road, Crayford	£0.00	£0.10	£0.00	£0.00	£0.84	£0.00	£0.00	£0.00	£0.94	£0.94
Sainsbury's, Stadium Way, Crayford	£3.72	£11.11	£6.10	£10.54	£17.71	£3.13	£0.00	£9.00	£61.30	£52.30
Other stores in Crayford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.18	£0.00
CRAYFORD: SUB-TOTAL	£3.72	£14.78	£7.26	£15.06	£23.82	£4.14	£0.14	£11.51	£80.44	£68.78
ERITH TOWN CENTRE										
Farmfoods, Pier Road, Erith	£0.16	£0.65	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.88	£0.88
Iceland, Town Square, Erith	£0.00	£1.53	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£1.60	£1.60
Morrisons, James Watt Way, Erith	£9.08	£30.04	£0.40	£6.04	£1.28	£0.00	£0.00	£0.91	£47.75	£46.83
Local shops, Erith Town Centre	£0.13	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.38	£0.38
ERITH: SUB-TOTAL	£9.36	£32.46	£0.40	£6.20	£1.28	£0.00	£0.00	£0.91	£50.61	£49.69
SIDCUP TOWN CENTRE										
Iceland, Sidcup High Street, Sidcup	£0.00	£0.00	£0.00	£0.00	£0.09	£0.49	£0.17	£0.00	£0.75	£0.58
Little Waitrose, High Street, Sidcup	£0.00	£0.00	£0.00	£2.76	£0.45	£8.08	£0.17	£0.00	£11.45	£11.29
Morrisons, Jenner Close, Sidcup	£0.00	£0.25	£0.26	£0.07	£0.58	£29.32	£2.69	£0.21	£33.39	£30.49
Local shops, Sidcup Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.62	£0.56	£0.00	£1.19	£0.62
SIDCUP: SUB-TOTAL	£0.00	£0.25	£0.26	£2.83	£1.11	£38.51	£3.59	£0.21	£46.78	£42.98
WELLING TOWN CENTRE										
Iceland, Welling High Street, Welling	£0.15	£0.00	£1.94	£0.00	£0.00	£0.00	£0.00	£0.00	£2.09	£2.09
Lidl, Upper Wickham Lane, Welling	£0.15	£0.10	£7.13	£0.07	£0.00	£0.00	£0.00	£0.09	£7.54	£7.46
Morrisons, Welling High Street, Welling	£0.97	£0.35	£15.06	£1.73	£0.08	£0.58	£0.00	£0.20	£18.97	£18.78
Tesco Superstore, Welling High Street, Welling	£0.75	£0.82	£15.30	£0.90	£0.76	£2.53	£0.48	£0.29	£21.83	£21.05
Local shops, Welling Town Centre	£0.00	£0.00	£1.03	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£1.03
WELLING: SUB-TOTAL	£2.02	£1.27	£40.46	£2.71	£0.84	£3.11	£0.48	£0.58	£51.46	£50.40
DISTRICT CENTRES										
Belvedere	£9.25	£2.04	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£11.38	£11.38
Bexley	£0.00	£0.08	£0.48	£0.00	£1.53	£0.17	£0.00	£0.44	£2.70	£2.26
Blackfen	£0.00	£0.00	£0.65	£0.00	£0.00	£9.14	£0.00	£0.00	£9.79	£9.79
Northumberland Heath	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.09
ALL DISTRICT CENTRES: SUB-TOTAL	£9.25	£2.21	£1.23	£0.00	£1.53	£9.30	£0.00	£0.44	£23.96	£23.52
NEIGHBOURHOOD CENTRES										
	£1.01	£11.15	£15.86	£14.03	£7.24	£18.21	£7.44	£2.08	£77.00	£67.49
OUT OF CENTRE										
Asda, Picardy Manor Way, Station Road, Belvedere	£12.39	£10.35	£0.45	£2.36	£0.30	£0.00	£0.00	£0.00	£25.86	£25.86
Asda, Crook Log, Bexleyheath	£0.99	£0.65	£3.08	£1.88	£2.24	£0.75	£0.00	£1.30	£10.89	£9.59
Lidl, Eynsham Drive, Abbey Wood	£2.56	£0.37	£0.00	£0.64	£0.00	£0.00	£0.16	£0.00	£3.73	£3.57
Other	£0.15	£0.10	£0.00	£1.68	£0.00	£0.00	£0.00	£0.00	£1.92	£1.92
ALL OUT OF CENTRE: SUB-TOTAL	£16.09	£11.47	£3.53	£6.56	£2.54	£0.75	£0.16	£1.30	£42.40	£40.94
BEXLEY BOROUGH TOTAL RETENTION:										
	£54.50	£94.77	£87.65	£69.44	£45.34	£87.75	£12.30	£18.18	£469.94	£439.46
OUTSIDE OF BOROUGH										
Tesco Superstore, Edgington Way, Fooks Cray	£0.00	£0.00	£0.92	£0.23	£5.47	£17.33	£13.82	£2.31	£40.08	£23.96
Sainsbury's, Harow Mannor Way, Abbey Wood	£7.19	£0.80	£0.76	£0.00	£0.00	£0.13	£0.00	£0.00	£8.88	£8.88
Bromley	£0.00	£0.00	£0.00	£0.26	£0.10	£0.31	£2.67	£0.00	£3.33	£0.67
Dartford	£0.00	£1.91	£0.13	£1.41	£0.81	£0.11	£0.68	£6.66	£11.71	£4.37
Orpington	£0.00	£0.00	£0.00	£0.00	£0.10	£1.93	£47.57	£0.09	£49.69	£2.03
Thamesmead	£15.93	£0.98	£4.20	£0.99	£1.37	£1.41	£0.00	£0.00	£24.89	£24.89
Other	£1.24	£2.64	£2.69	£2.00	£3.90	£16.54	£44.08	£19.42	£92.50	£29.00
ALL OUT OF BOROUGH: SUB-TOTAL	£24.35	£6.33	£8.70	£4.90	£11.74	£37.77	£108.81	£28.48	£231.09	£93.80
STUDY AREA MARKET SHARE										
	£78.8	£101.1	£96.4	£74.3	£57.1	£125.5	£121.1	£46.7	£701.0	£533.3

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 6: 2038 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
Excluding Internet Shopping and other Special Forms of Trading

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

APPENDIX A6:
COMPARISON GOODS TURNOVER FORECASTS

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES
Excluding Internet Shopping and other Special Forms of Trading

ZONE:	1	2	3	4	5	6	7	8	CATCHMENT AREA (Zones 1-8)	BEXLEY BOROUGH (Zones 1-6)
TOTAL AVAILABLE EXPENDITURE (£m):	£97.9	£132.5	£137.9	£110.4	£83.1	£183.8	£176.4	£70.8	£992.8	£745.6
Bexleyheath Strategic Centre	£38.0	£47.0	£48.0	£51.8	£14.6	£35.7	£1.9	£3.6	£240.6	£235.1
Crayford Major Town Centre	£2.6	£9.6	£3.3	£5.0	£14.7	£6.0	£0.0	£5.9	£47.1	£41.2
Erith Major Town Centre	£2.1	£10.5	£0.0	£1.6	£0.1	£0.1	£0.0	£0.1	£14.6	£14.5
Sidcup Major Town Centre	£0.0	£0.1	£0.9	£0.2	£0.6	£24.7	£1.3	£0.7	£28.6	£26.6
Welling Major Town Centre	£1.1	£0.7	£14.7	£0.8	£0.3	£1.1	£0.2	£0.5	£19.2	£18.6
DISTRICT CENTRES:										
Belvedere (Nuxley Road)	£6.5	£1.7	£0.0	£1.9	£0.1	£0.0	£0.0	£0.0	£10.2	£10.2
Bexley Village	£0.4	£0.0	£0.1	£0.0	£1.1	£0.2	£0.0	£0.7	£2.4	£1.8
Blackfen	£0.0	£0.0	£0.1	£0.0	£0.0	£3.4	£0.0	£0.0	£3.5	£3.5
Northumberland Heath	£0.4	£3.5	£0.1	£0.4	£0.0	£0.0	£0.1	£0.1	£4.5	£4.4
NEIGHBOURHOOD CENTRES:	£0.2	£0.1	£0.1	£1.5	£0.2	£0.3	£0.1	£0.4	£2.8	£2.3
OUT OF CENTRE:										
Crittalls Corner Retail Park	£0.7	£0.2	£1.7	£0.4	£1.6	£8.2	£4.2	£0.5	£17.5	£12.8
Madford Retail Park	£0.5	£0.1	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8
Tower Retail Park	£5.3	£9.1	£9.1	£8.0	£9.2	£4.0	£0.2	£6.9	£51.7	£44.7
All Other Out of Centre in the Borough	£6.2	£10.1	£3.7	£5.3	£0.2	£0.2	£0.0	£0.1	£25.6	£25.5
OUT OF CENTRE: SUB-TOTAL	£12.7	£19.5	£14.4	£14.0	£11.0	£12.4	£4.3	£7.5	£95.7	£83.9
BEXLEY BOROUGH RETENTION LEVEL:	£64.0	£92.6	£81.9	£77.1	£42.6	£84.0	£7.9	£19.3	£469.4	£442.1
OUTSIDE OF BOROUGH:	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Bluewater	£14.1	£24.5	£37.3	£23.0	£26.7	£50.4	£18.8	£25.0	£219.8	£176.1
Bromley	£0.5	£0.5	£0.3	£0.6	£0.2	£7.2	£38.6	£0.3	£48.1	£9.2
Dartford	£2.6	£5.8	£1.9	£2.4	£6.9	£2.8	£0.8	£19.8	£43.1	£22.5
Orpington	£0.7	£1.1	£3.8	£1.4	£2.8	£18.5	£84.7	£1.3	£114.3	£28.3
Thamesmead	£7.1	£0.8	£2.0	£0.4	£0.0	£0.4	£0.0	£0.0	£10.7	£10.7
Westfield Stratford	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.4	£0.4
Other	£9.0	£7.2	£10.7	£5.6	£3.7	£20.2	£25.8	£5.0	£87.1	£56.3
OUTSIDE OF BOROUGH:	£33.9	£39.9	£56.0	£33.3	£40.5	£99.8	£168.5	£51.4	£523.4	£303.5
TOTAL MARKET SHARE:	£97.9	£132.5	£137.9	£110.4	£83.1	£183.8	£176.4	£70.8	£992.8	£745.6

TABLE 3: 2021 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 5: 2031 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES AND STORES
Excluding Internet Shopping and other Special Forms of Trading

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

TABLE 6: 2038 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES & STORES
Excluding Internet Shopping and other Special Forms of Trading

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

**APPENDIX A7:
RETAIL COMMITMENTS**

LONDON BOROUGH OF BEXLEY

NEW RETAIL FLOORSPACE - COMMITMENTS AND PLANNED DEVELOPMENT: 2018 - 2021

LOCATION	IN / OUT OF CENTRE	PLANNING REF:	DESCRIPTION OF DEVELOPMENT	UPDATE BY BEXLEY BOROUGH COUNCIL @ MAY 2021	ESTIMATED GROSS FLOORSPACE (sqm) ^{(1) / (2)}				2021: ESTIMATED TURNOVER (£m) ⁽³⁾		2026: ESTIMATED TURNOVER (£m)	
					TOTAL	TOTAL RETAIL	FOOD	NON-FOOD	FOOD	NON-FOOD	FOOD	NON-FOOD
MAJOR COMMITMENTS & PLANNED DEVELOPMENTS AT 2018												
Bexleyheath Former Civic Offices Broadway	IC	17/02745/FULM	Demolition of existing structures to provide 518 residential units and 3,150 sq m of flexible commercial floorspace comprising a mix of retail floorspace (Class A1 - A3); business (Class B1); leisure (Class D2) in new buildings, together with associated car parking and cycle storage, etc., and including the pedestrianisation of the northern section of Highlands Road.	Under construction	3,150	2,100	0	2,100			£0.0	£11.2
Erith Former Riverside Swimming Centre	IC	15/01084/FULM	Re-development of site to provide a mixed-use development comprising of 73 residential units (Class C3) and 139 square metres of flexible retail/commercial floorspace (Class A1-A3/B1/D1).	Completed 24 May 2019	139	28	0	28	£0.0	£0.1	£0.0	£0.1
Belvedere 28-32 Nuxley Rd	IC	16/02008/FULM	Redevelopment to provide a retail unit (Class A1) on the ground floor and 8 x 2 bed self-contained units on the first and second floors. Provision of car and cycle parking.	Completed 4 March 2020	274	274	0	274	£0.0	£1.2	£0.0	£1.5
Southmere Village Binsey Walk / Tavy Bridge	OOO	16/01251/FULM	Demolition of existing buildings to provide 525 new residential units and 3,691 sqm (GIA) of commercial floorspace with flexible A1-A3 floorspace, B1a (office), D1 (Non-residential institutions) and D2 (Assembly and leisure) and associated works.	Under construction	4,082	860	430	430			£3.3	£2.3
Abbey Wood Land to west Of Sedgemere Road And East Of Harrow Manorway London	OOO	16/01275/OUTM	Outline application for new residential development of up to 219 units and up to 3,225 sq metres of flexibly commercial floorspace and associated works.	Granted subject to S106 (Dec 2016) - Extant permission	3,225	1,935	968	968			£7.5	£5.2
Abbey Wood / Thamesmead Land At Coralline Walk Harrow Manorway	OOO	16/01288/OUTM	Outline application for demolition of existing buildings and hardstanding, residential development of upto 549 units and upto 3225 sq. metres of commercial floorspace and associated works	Granted subject to S106 (Dec 2016) - Extant permission	3,225	1,935	968	968			£7.5	£5.2
Thamesmead/Abbey Wood Land At Binsey Walk Adjacent To Harrow Manorway London	OOO	16/01287/OUTM	Outline application for new residential development of up to 329 units and up to 1,050 sq metres of commercial floorspace, with all matters reserved, and associated works.	Granted subject to S106 (Dec 2016) - Extant permission	1,050	630	315	315			£2.4	£1.7
MAJOR COMMITMENTS & PLANNED DEVELOPMENTS - POST 2018												
Welling Lord Kitchener Public House 21 Wrotham Road DA16 1LS	OOO	19/01997/FULM	Change of use of the ground floor of the existing public house (A4) to retail (A1), conversion of the existing first and second floor and alterations and extensions including a two storey (with accommodation in the roof) rear extension to form 19 apartments comprising of 10 x 2 bed and 9 x 1 bed apartments with associated car and cycle parking.	Permission granted - 2021	404	404	202	202			£1.6	£1.1
Belvedere Clydesdale Way, DA17 6FD	OOO	19/02328/FUL	Change of use from Office unit (Class B1) to form two retails units (Class A1) including new shopfronts, external alterations and the creation of 11 car parking spaces.	Permission granted - 2019	960	960	480	480			£3.7	£2.6
TOTAL COMMITTED & PLANNED FLOORSPACE:					16,509	9,126	3,362	5,764	£0.0	£1.4	£25.9	£30.8

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

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

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

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

**APPENDIX A8:
RETAIL CAPACITY FORECASTS –
GLA PROJECTIONS**

CONVENIENCE GOODS CAPACITY - GLA

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

Excluding SFT & 'Inflow' from outside Study Area

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

Notes: Assume constant market shares over forecast period.

TABLE 2: ALL CONVENIENCE GOODS - TOTAL TURNOVER

Including 'Inflow' from outside Study Area

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

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

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE ⁽¹⁾

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

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

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

TABLE 4: BEXLEY BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

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

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

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

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

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

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

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

COMPARISON GOODS CAPACITY - GLA

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

	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	£240.6	238.0	279.2	327.9	410.2
CRAYFORD - MAJOR DISTRICT CENTRE	£47.1	46.8	55.0	64.5	80.6
ERITH - MAJOR DISTRICT CENTRE	£14.6	14.6	17.2	20.3	25.7
SIDCUP - MAJOR DISTRICT CENTRE	£28.6	27.8	31.9	36.8	45.1
WELLING - MAJOR DISTRICT CENTRE	£19.2	18.9	22.1	25.8	31.6
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£350.2	£346.1	£405.4	£475.2	£593.2
BELVEDERE DISTRICT CENTRE	£10.2	£10.2	11.9	£13.9	£17.6
BEXLEY DISTRICT CENTRE	£2.4	£2.4	2.8	£3.3	£4.1
BLACKFEN DISTRICT CENTRE	£3.5	£3.4	3.9	£4.5	£5.5
NORTHUMBERLAND HEATH DISTRICT CENTRE	£4.5	£4.5	5.3	£6.3	£8.0
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:	£20.7	£20.5	£24.0	£28.0	£35.2
NEIGHBOURHOOD CENTRES	£2.8	£2.7	£3.3	£3.9	£4.9
OUT OF CENTRE RETAIL PARKS & STORES:					
Crittalls Corner Retail Park	£17.5	£17.1	£19.7	£22.7	£28.1
Tower Retail Park	£51.7	£51.3	£60.4	£70.9	£88.7
Other out of centre	£26.4	£26.3	£30.9	£36.4	£45.9
TOTAL SURVEY-DERIVED TURNOVER	£469.4	£464.1	£543.7	£637.2	£795.9

Notes: Assume constant market shares over forecast period.

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

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

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

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE ⁽¹⁾

LOCATION:	COMMITTED RETAIL FLOORSPACE (SQM) ⁽²⁾		2021: AVERAGE SALES DENSITY (£/sqm)	FORECAST TURNOVER (£M)			
	Gross	Net		2021	2026	2031	2038
TOWN CENTRE LOCATIONS:	2,402	1,681	£6,500	£1.4	£12.9	£14.8	£18.1
OUT OF CENTRE LOCATIONS:	6,724	2,353	£6,500	£0.0	£18.0	£20.8	£25.4
TOTAL	9,126	4,035		£1.4	£30.8	£35.6	£43.5

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

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

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

Assume Equilibrium at Base Year and Constant Market Shares

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

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

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

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

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

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

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

**APPENDIX A9:
RETAIL CAPACITY FORECASTS –
BGS PROJECTIONS**

CONVENIENCE GOODS CAPACITY - BEXLEY GROWTH STRATEGY

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

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

Notes: Assume constant market shares over forecast period.

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

	Estimated 'Inflow' from outside Study Area	2018	2021	2026	2031	2038
BEXLEYHEATH - STRATEGIC CENTRE	20%	£118.4	£119.9	£125.2	£134.7	£155.1
CRAYFORD - MAJOR DISTRICT CENTRE	15%	£92.5	£94.3	£97.7	£103.7	£117.2
ERITH - MAJOR DISTRICT CENTRE	10%	£54.6	£56.4	£61.2	£69.1	£90.0
SIDCUP - MAJOR DISTRICT CENTRE	15%	£53.6	£53.6	£54.3	£54.9	£56.0
WELLING - MAJOR DISTRICT CENTRE	25%	£66.8	£66.7	£67.5	£69.4	£72.0
TOWN CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:		£386.0	£390.9	£406.0	£431.8	£490.4
BELVEDERE DISTRICT CENTRE	5%	£11.6	£11.9	£13.3	£15.5	£20.1
BEXLEY DISTRICT CENTRE	5%	£2.8	£2.8	£2.9	£3.0	£3.2
BLACKFEN DISTRICT CENTRE	5%	£10.0	£10.0	£10.1	£10.2	£10.3
NORTHUMBERLAND HEATH DISTRICT CENTRE	5%	£0.1	£0.1	£0.1	£0.1	£0.2
DISTRICT CENTRES: TOTAL STUDY AREA EXPENDITURE ALLOCATED:		£24.5	£24.8	£26.4	£28.7	£33.8
NEIGHBOURHOOD CENTRES	5%	£79.2	£79.8	£81.8	£85.4	£93.1
ALL OUT OF CENTRE STORES	15%	£48.5	£49.5	£53.4	£59.7	£73.7
TOTAL STUDY AREA EXPENDITURE ALLOCATED TO STORES IN BOROUGH AREA:		£538.2	£545.1	£567.5	£605.6	£690.9

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

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE ⁽¹⁾

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

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

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

TABLE 4: BEXLEY BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

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

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

CONVENIENCE GOODS CAPACITY - BEXLEY GROWTH STRATEGY

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

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

Notes: Assume constant market shares over forecast period.

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

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

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

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE ⁽¹⁾

LOCATION:	COMMITTED RETAIL FLOORSPACE (SQM) ⁽²⁾		2021: AVERAGE SALES DENSITY (£/sqm)	FORECAST TURNOVER (£M)			
	Gross	Net		2021	2026	2031	2038
TOWN CENTRE LOCATIONS:	2,402	1,681	£6,500	£1.4	£12.9	£14.8	£18.1
OUT OF CENTRE LOCATIONS:	6,724	2,353	£6,500	£0.0	£18.0	£20.8	£25.4
TOTAL	9,126	4,035		£1.4	£30.8	£35.6	£43.5

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

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

TABLE 4: BEXLEY POPULATION GROWTH STRATEGY
COMPARISON GOODS CAPACITY ASSESSMENT - LOCAL AUTHORITY AREA
Assume Equilibrium at Base Year and Constant Market Shares

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

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

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

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

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

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

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

**APPENDIX A10:
HOUSING GROWTH AREAS –
RETAIL CAPACITY FORECASTS**

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

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

TABLE 1.1 LOWER BELVEDERE GROWTH AREA

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

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

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

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

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

TABLE 1.2 SLADE GREEN GROWTH AREA

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

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

(2) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 2.

TABLE 1.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

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

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

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

2. CONVENIENCE GOODS CAPACITY:

TABLE 2.1 LOWER BELVEDERE GROWTH AREA

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

TABLE 2.2 SLADE GREEN GROWTH AREA

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

TABLE 2.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

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

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

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

TABLE 1.1 LOWER BELVEDERE GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Lower Belvedere (1)	490	505	1,362	4,106	12,376
Population - sites within Thamesmead East New Development Area (2)	7	7	990	2,261	3,571
Total Population Uplift	497	512	2,351	6,367	15,947
Average Comparison Expenditure (£ per capita) (3)	£2,492	£2,396	£2,687	£3,027	£3,638
Available Expenditure (£m) (4)	£1.2	£1.2	£6.3	£19.3	£58.0

Sources & Notes: (1) Forecast population growth for Lower Belvedere derived from Bexley Growth Strategy and planned housing allocations.
 (2) The population from proposed housing sites in the Thamesmead ward is allocated on a 50:50 basis between Belvedere and Wilton Road/ Abbey Wood
 (3) Average expenditure per capita on convenience goods is derived from the Experian-based average expenditure for Zone 1 (the Belvedere Zone). All expenditure figures exclude spend on Special Forms of Trading, which includes online purchases not sourced directly from "physical" stores. All expenditure and turnover figures are expressed in 2019 prices.
 (4) Total available expenditure is derived by multiplying the total population with the average expenditure per capita

TABLE 1.2 SLADE GREEN GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Slade Green Growth Area (1)	14	14	1,729	7,394	19,636
Average Comparison Expenditure (£ per capita) (2)	£2,704	£2,600	£2,916	£3,285	£3,947
Available Expenditure (£m)	£0.04	£0.04	£5.0	£24.3	£77.5

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

TABLE 1.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

	2018	2021	2026	2031	2038
Population Projections - Lesnes Valley New Development (1)	388	1,410	3,545	6,033	6,916
Population Projections - Thamesmead East New Development Area (2)	7	7	990	2,261	3,571
Total Population Uplift	395	1,417	4,534	8,294	10,486
Average Comparison Expenditure (£ per capita) (2)	£2,492	£2,396	£2,687	£3,027	£3,638
Available Expenditure (£m)	£1.0	£3.4	£12.2	£25.1	£38.1

Sources & Notes: (1) Forecast population growth for Lesnes Valley Development derived from Bexley Growth Strategy and planned housing allocations.
 (2) Average expenditure is derived from the Experian-based average expenditure for Zone 1.

2. COMPARISON GOODS CAPACITY

TABLE 2.1 LOWER BELVEDERE GROWTH AREA

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

TABLE 2.2 SLADE GREEN GROWTH AREA

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

TABLE 2.3 ABBEY WOOD / WILTON ROAD GROWTH AREA

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

**APPENDIX A11:
LEISURE NEEDS ASSESSMENT –
EXPENDITURE GROWTH**

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

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

Growth: 2021 to 2031	
%	No.
6.2%	2,500
10.0%	5,100
8.5%	3,900
14.4%	5,050
9.2%	2,400
4.1%	2,350
2.3%	1,200
9.9%	2,105
9.9%	32,576

	2018	2021	2026	2031	2038
Zones 1-6 BEXLEY BOROUGH	250,000	256,800	267,650	278,100	288,430
Zones 6-8 OUTSIDE BOROUGH	71,391	72,562	74,375	75,867	78,905
STUDY AREA TOTAL:	321,391	329,362	342,025	353,967	367,335

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

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

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

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

TOTAL
£2,064
£2,195
£2,596
£2,788
£2,728
£2,756
£2,888
£2,834
£2,606
100%

Source: Average spend per capita estimates (2019 prices) are derived from Experian MMG3 'Retail Area Planner' Reports.
 Notes: (1) Includes spend on hotels, bed & breakfast accommodation, etc.
 (2) Includes spend on Museums, Theatres, Art Galleries, etc.
 (3) Includes spend on Bookmakers, Amusement Arcades, Bingo, Casinos, etc.
 (4) Includes spend on Hairdressers, Nail Parlours, Health & Beauty, etc.
 (5) Includes spend on Gyms, Golf, etc.
 (6) Includes spend on restaurants, cafés, takeaways, etc.

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

	2018	2019	2020	2021	2022-2026	2027-2038
LEISURE SPEND - GROWTH PER ANNUM	-1.5%	-0.5%	0.9%	1.0%	1.2%	1.1%

HISTORIC TREND: 1997-2018
-0.6%

Source: Experian 'Retail Planner Briefing Note 18 (October 2020). Figures 1a and 1b.

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

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

GROWTH (£m):

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

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

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

GROWTH (£m):

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

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

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

GROWTH (£m):

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

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

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

GROWTH (£m):

2021-2031	2031-38
£21.2	£36.7
£23.8	£41.3
£21.5	£37.4
£21.1	£36.7
£24.1	£41.9
£21.5	£37.4
£25.4	£44.1
£25.4	£44.1

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

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

GROWTH (£m):

2021-2031	2031-38
£10.9	£18.9
£12.4	£21.6
£16.7	£29.0
£18.9	£32.9
£17.1	£29.8
£18.5	£32.1
£18.5	£32.1
£20.4	£35.4

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

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

GROWTH (£m):

2021-2031	2031-38
£18.5	£32.0
£20.3	£35.2
£28.7	£49.8
£32.8	£56.9
£30.4	£52.7
£31.6	£54.8
£31.6	£54.8
£33.9	£58.8

TABLE 4f: TOTAL FORECAST GROWTH IN SPEND ON FOOD & BEVERAGE (£ per capita)

	2018	2021	2026	2031	2038
Zone 1	£1,198	£1,227	£1,302	£1,375	£1,485
Zone 2	£1,242	£1,272	£1,351	£1,426	£1,540
Zone 3	£1,479	£1,515	£1,608	£1,699	£1,834
Zone 4	£1,553	£1,591	£1,689	£1,784	£1,926
Zone 5	£1,512	£1,549	£1,644	£1,736	£1,874
Zone 6	£1,547	£1,584	£1,681	£1,776	£1,917
Zone 7	£1,600	£1,638	£1,739	£1,837	£1,983
Zone 8	£1,541	£1,578	£1,675	£1,769	£1,910

GROWTH (£m):

2021-2031	2031-38
£148.6	£258.0
£154.1	£267.7
£183.5	£318.7
£192.7	£334.7
£187.6	£325.8
£191.9	£333.2
£198.5	£344.6
£191.2	£332.0

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

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

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

GROWTH (£m):	
2021-2031	2031-38
£16.2	£29.2
£26.6	£45.5
£26.4	£40.0
£28.1	£48.3
£16.3	£26.5
£27.1	£46.2
£22.3	£43.1
£14.2	£23.9
£177.2	£302.7

GROWTH (£m):	
2021-31	
%	No.
21.4%	141
17.2%	36
25.0%	218

TABLE 5a: ACCOMMODATION SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

	2018	2021	2026	2031	2038
Zone 1	£6.1	£6.5	£7.1	£7.7	£8.7
Zone 2	£8.0	£8.5	£9.5	£10.5	£11.9
Zone 3	£10.0	£10.4	£11.5	£12.6	£13.8
Zone 4	£8.4	£8.9	£10.2	£11.4	£13.2
Zone 5	£5.9	£6.3	£7.1	£7.7	£8.6
Zone 6	£13.8	£14.2	£15.4	£16.6	£18.3
Zone 7	£12.1	£12.5	£13.5	£14.4	£16.1
Zone 8	£5.3	£5.6	£6.3	£6.9	£7.8
STUDY AREA - TOTAL:	£69.6	£73.0	£80.5	£87.9	£98.5

	2018	2021	2026	2031	2038
Zones 1-6 BEXLEY BOROUGH	£52.2	£54.8	£60.7	£66.6	£74.5
Zones 6-8 OUTSIDE BOROUGH	£17.4	£18.2	£19.8	£21.3	£23.9
STUDY AREA TOTAL:	£69.6	£73.0	£80.5	£87.9	£98.5

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

GROWTH (£m):	
2021-31	
%	No.
21.5%	12
17.4%	3
25.1%	18

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

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

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

GROWTH (£m):	
2021-2031	2031-38
£2.3	£4.2
£4.0	£6.8
£3.5	£5.3
£3.9	£6.7
£2.3	£3.8
£3.7	£6.4
£3.3	£6.4
£1.9	£3.2
£25.0	£42.8

GROWTH (£m):	
2021-31	
%	No.
21.5%	20
17.0%	5
25.0%	31

TABLE 5c: GAMES OF CHANCE - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

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

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

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

GROWTH (£m):	
2021-31	
%	No.
21.5%	10
17.2%	3
25.1%	16

TABLE 5d: PERSONAL GROOMING - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

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

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

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

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

TABLE 5e: RECREATION & SPORTING SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)

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

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

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

GROWTH (£m):	
2021-31	
%	No.
21.5%	12
17.3%	3
25.0%	19

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

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

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

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

GROWTH (£m):	
2021-31	
%	No.
21.4%	80
17.2%	20
25.0%	123