Lewisham Retail Capacity Study Update 2019

Final Report

September 2019

urban shape
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1. Introduction

1.1 Urban Shape have been instructed by the London Borough of Lewisham ('LBL') to provide a technical update to the London Borough of Lewisham Retail Capacity Study 2017 ('the 2017 Study'). This study – the **Lewisham Retail Capacity Study Update 2019** - provides LBL with an updated assessment of the quantitative 'need' for new retail (class A1) floorspace which the Borough will need to plan for in future years.

1.2 It is anticipated that this report will form part of the evidence base for the Council's emerging new Local Plan, which will provide the strategic framework for the Borough over the period 2020 to 2040, and accordingly this report provides updated 'need' figures for the duration of this new Plan period.

1.3 Alongside the updated forecasts of quantitative need, in this study we also provide an update to the development plan context within which the study is being prepared, taking into account key policy developments which have taken place in the period since the publication of the 2017 Study, such as the revised National Planning Policy Framework (NPPF) (2019) and Draft London Plan with Minor Suggested Changes (2018). We also provide an update to the 'market context' within which the study is being prepared, reflecting the rapidly-moving pace of change in the retail and leisure sector which is currently taking place.

1.4 The 2017 Study was supported by full 'health check' assessments of the Borough's network of Major Centres (Lewisham and Catford) and District Centres (Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross/New Cross Gate and Sydenham), and these have not been updated as part of this study. In addition, the household survey data which underpinned the assessment of shopping patterns and quantitative need in the 2017 Study has not been updated. The survey work which supported the 2017 Study was undertaken in late 2015; since this time there have been no major changes in shopping or leisure provision in the Borough which would warrant a new survey being undertaken; it therefore remains a robust and up-to-date assessment of patterns of shopping of residents in the Borough.

1.5 The 2017 Study concluded by setting out a series of strategic recommendations for LBL to take forward into their development plans to guide the future development of retail floorspace in Borough, and ensure the long term vitality and viability of the network of town and district centres. Whilst the scope of our instruction does not extend to the development of new strategic recommendations, at Appendix 5 we revisit the recommendations from the 2017 Study and provide comment on their continued suitability and robustness in light of the findings of this Update.

1.6 The remainder of this report is structured as follows:

- **Section 2** sets out a summary of the key findings of the 2017 Study.
- **Section 3** provides an update to the planning policy context framing the development of retail and town centre policy.
- **Section 4** updates the current market context for retail and town centres, also drawing reference to a number of critical thinking documents on the future of town centres and High Streets which have recently been published.
- **Section 5** sets out the 'technical inputs' which we have incorporated into the quantitative need update, such as population and expenditure forecasts, 'special forms of trading' growth, and commitments for new retail floorspace.

- **Section 6** sets out the revised ‘baseline’ assessments of class A1 retail need for the Borough, split between convenience (food) and comparison (non-food) floorspace, based on the updated technical inputs discussed in Section 5.
- **Section 7** sets out a series of ‘scenario tests’ to the baseline need figures identified in Section 6, namely testing need figures arising from adopting locally-derived rather than UK average estimates of online spend, and testing lower levels of per capita expenditure growth on comparison goods.
- **Section 8** sets out conclusions.

1.7 The main report is supposed by the following appendices:

- **Appendix 1 and 2** sets out data tables for the updated ‘baseline’ need forecasts for comparison and convenience goods respectively.
- **Appendix 3 and 4** set out data tables for the ‘scenario test’ need assessments.
- **Appendix 5** provides guidance on the continued suitability of the recommendations set out in the 2017 Study.

2. Key findings from the 2017 Study

Introduction

2.1 In this section we briefly summarise the key findings from the 2017 Study which are not the subject of a full update in this report, in order to provide context to the remaining sections of the report and the revisit of the strategic recommendations set out at Appendix 5.

Health check assessments of LBL's network of centres

2.2 The 2017 Study undertook a full assessment of the vitality and viability of the Borough's network of Major and District centres (as defined in the London Plan), against the 'health check' criteria set out in Planning Practice Guidance. A summary of the network of Major and District centres in LBL is shown in Table 2.1.

Table 2.1 Major and District Centres in LBL

'Major' town centres	'District' centres
Lewisham, Catford	Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross/New Cross Gate, Sydenham

Source: Draft London Plan (2018) / LBL Core Strategy (2012)

2.3 Below we provide a short summary of the findings of the 'health check' assessment of each of these centres which was undertaken in the 2017 Study. Where relevant, we have also provided a short qualitative update on key developments in the centres which have taken place subsequent to the publication of the 2017 Study.

Lewisham – Major town centre

2.4 Lewisham town centre is the highest-order comparison goods shopping destination in the Borough, and the 2017 Study identified it to be performing well both qualitatively and quantitatively. The household survey found that 77% of shoppers visit the centre for comparison goods shopping, and non-food floorspace in the town centre trades at £12,960 per sq.m, representing a strong trading performance. The centre has a low vacancy rate except in peripheral areas, although there is a large vacant former BHS store in the primary shopping area (which continues to remain vacant).

2.5 The retail offer is largely driven by lower-to-mid market retailers with a number of strong footfall-driving 'anchor' stores including M&S, TK Maxx and Primark. The Sainsbury's store within the covered Lewisham Centre is a further important anchor and trades at above company average levels. The street market is an additional key attractor, playing an important role in attracting footfall and enhancing the diversity of the centre.

2.6 The 2017 Study identified the principal qualitative gap in the offer of Lewisham town centre to be the relative lack of a commercial leisure offer, most notably the absence of a cinema. A shortfall of other dwell time-enhancing leisure uses (e.g. cafes, bars and restaurants) was also identified.

2.7 **2019 Update:** Subsequent to the publication of the 2017 Study, it has been announced that a new cinema is expected to form part of the second phase of the permitted Lewisham Gateway development, expected to commence construction later in 2019, with Empire Cinemas expected to be the operator. Should this come forward, this will address this qualitative gap in the leisure offer of the centre which the 2017 Study identified. Elsewhere in the centre, H&M have acquired the former BHS store and will commence trading in June 2019, upsizing from their existing small store in Lewisham Shopping Centre.

Catford – Major town centre

2.8 Catford is also classified as a 'Major' town centre, but has a different role and function to Lewisham, with an offer more focussed on meeting day-to-day rather than higher-order shopping needs. The household survey identified that users of the centre typically visit more frequently than is the case in Lewisham, but also spend less time in the centre. The household survey results identified that Catford has lost 'market share' from its local catchment for non-food shopping compared to previous evidence base studies.

2.9 Key retail anchors in the centre include Tesco, Aldi, Lidl, Argos, Boots, Iceland and Poundland, and the quality of the overall retail offer is predominantly orientated towards the lower/value end of the market. The centre also has an important leisure function (owing to the presence of the Broadway Theatre) and civic function (LBL offices), but there is little in the way of complementary facilities such as cafes and restaurants to support these uses.

2.10 **2019 Update**: A major new residential quarter adjacent to Catford and Catford Bridge stations, known as Catford Green, is approaching completion, offering potential for additional footfall and spend in Catford town centre from the new residential population. The development includes a new Sainsbury's Local store.

2.11 Elsewhere in the centre, planning permission has been granted to Really Local Group to turn the former large Poundland store in the Catford Centre into 'Catford Mews', a new cultural venue providing a three-screen cinema, live music venue and community workspace. If implemented, it will mean that alongside the approved proposals for Lewisham Gateway, that both of the Borough's major centres will have an enhanced cultural offer.

District centres

2.12 The Major town centres of Lewisham and Catford are supported by a network of seven district centres. The 2017 Study found that:

- **Blackheath** is a strong-performing district centre, with a particularly strong focus on food and drink, and upmarket comparison goods retailing. The centre is attractive and well-maintained, benefiting from its setting on the edge of Greenwich Park. There is little scope for outward expansion of the centre, and the absence of any convenience goods shopping provision represents a key qualitative gap.

- **Deptford** has a close functional and geographical relationship with New Cross/New Cross Gate, but has a more varied offer which is better able to meet local/day-to-day shopping needs. The centre is an important hub for the creative industries in south east London, through the concentration of art galleries and studio spaces around Creekside and facilities such as the Albany Centre and the community-run Deptford Cinema.

- **Downham** is a small district centre which plays a more limited role and function compared to the other district centres in the Borough, both in terms of its diversity and uses and the extent of its catchment area. Nevertheless, it is able to meet a range of local convenience shopping and retail services needs.

- **Forest Hill** is a strong-performing district centre, with a strong convenience function anchored by a large Sainsbury's supermarket, as well as a developing independent comparison goods quarter along Dartmouth Road. The Horniman Museum and Gardens to the north of the centre are an important cultural draw. The environmental quality of the centre is hampered by the centre's location on the busy South Circular.

- **Lee Green** is struggling for vitality and viability to a greater extent than other centres, on account of waiting for the long-planned redevelopment of the Leegate Centre to come forward, which should in turn act as a catalyst for the wider regeneration of the centre. The in-centre Sainsbury's store nevertheless performs well and is a strong retail anchor.
- **New Cross / New Cross Gate** is a bustling and diverse centre but one where there are several qualitative gaps in the retail offer, particularly in terms of comparison goods. There is a need for the physical appearance of the centre to be enhanced, as well as improvements to the movement of pedestrians through the centre. 10% of the units in the centre are occupied by hot food takeaways, double LBL's target identified its Core Strategy. New Cross Gate Retail Park represents a major opportunity for intensification.
- **Sydenham** is a strong performing centre with a good retail and leisure mix, including two strong-performing foodstores, and no major gaps in its comparison goods offer. There is potential for the centre to develop closer linkages with nearby Kirkdale, which is home to a more upmarket/specialist retail offer.

2.13 **2019 update:** we are aware of the following developments in the district centres:

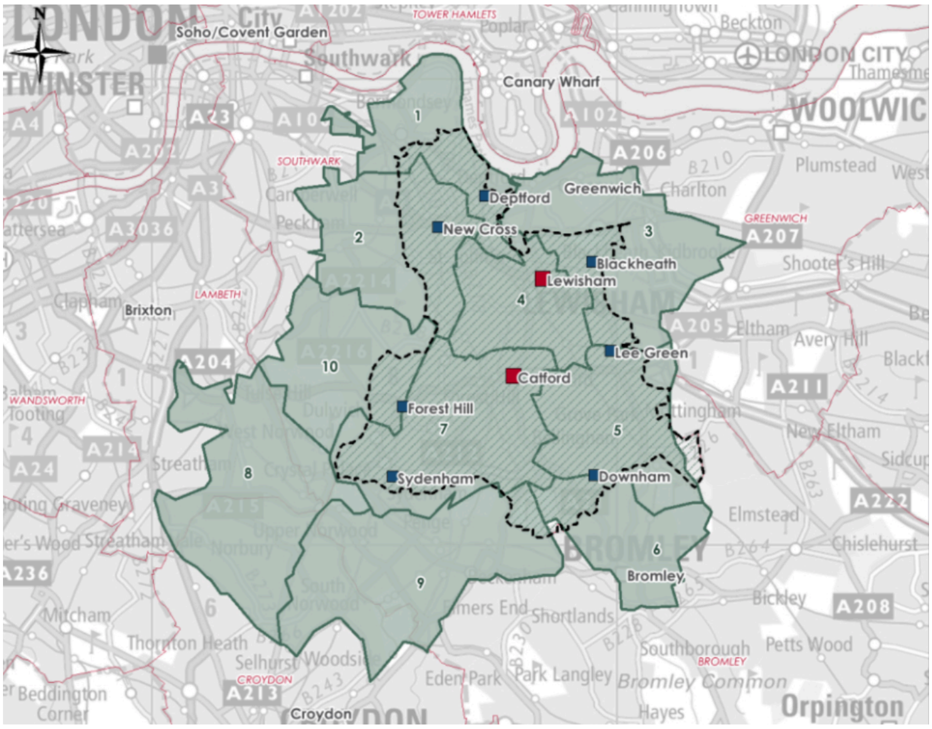
- In **Lee Green**, the planning application for the redevelopment of the Leegate Shopping Centre, which was undetermined at the time of preparation of the 2017 Study, has subsequently been approved. It is understood that revisions to the approved scheme could potentially come forward.
- In **Deptford**, the Deptford Market Yard development opened in November 2016. Set in the 14 railway arches adjacent to Deptford railway station, the arches have been development into commercial spaces for independent businesses, with a particular emphasis on food & beverage retail. The development links directly to Deptford High Street and the existing street and bric-a-brac market pitches, although the overall pitch of the offer in Deptford Market Yard is noticeably more upmarket.
- In **New Cross Gate**, public consultation has been held by Sainsbury's and Mount Anvil in respect of proposals to redevelop the site of the Sainsbury's supermarket adjacent to New Cross Gate station for a high-density, residential-led development of 1,500 new homes and a replacement Sainsbury's supermarket. No planning application has yet been submitted.
- In **Sydenham**, the former Co-Op/Budgens store at 74-78 High Street ceased trading in 2017. The closure has resulted in a highly prominent vacant unit on the High Street, although the district centre continues to be well-served by convenience stores.

Shopping patterns

2.14 As stated above, the 2017 Study was supported by a household telephone survey of shopping patterns, which identified where residents in the Borough and surrounding area ('the survey area') are undertaking their patterns of convenience (food), comparison (non-food) shopping, and visits to commercial leisure activities such as visits to cafes, bars, restaurants, cinema and so on. The household survey data was also used to inform the retail capacity projections set out in the 2017 Study and updated in this study.

2.15 The survey area covered LBL in its entirety alongside a surrounding 'buffer' area, in order to accurately capture 'inflow' of expenditure into the Borough from parts of neighbouring authorities. The survey area was also sub-divided into survey zones, in order to enable localised patterns of shopping to be captured. The survey area and zones are shown in Figure 2.1.

Figure 2.1 Survey area and zones



Zone 1 – Deptford
Zone 2 – New Cross
Zone 3 – Blackheath
Zone 4 – Lewisham TC
Zone 5 – Lee Green
Zone 6 – Bromley & Downham
Zone 7 – Catford & Sydenham
Zone 8 – Crystal Palace & West Norwood*
Zone 9 – Beckenham & South Norwood*
Zone 10 – Forest Hill

*denotes zone with no LBL town/district centres

Comparison (non-food) shopping patterns

2.16 The household survey found that of the total comparison goods spend available to the survey area, 52.8% is retained within the survey area (of which 27.4% is retained by centres in LBL, and 24.9% by other destinations within the survey area but outside LBL, e.g. Bromley and Peckham). The remaining 47.2% of spend goes to destinations outside the survey area, most notably Central London and Bluewater.

2.17 The household survey found that the most popular destinations for comparison goods shopping for residents in the survey area to be:

- Lewisham town centre (14.9% market share from survey area)
- Central London (12.9% market share from survey area)
- Bromley town centre (12.5% market share from survey area)
- Croydon town centre (6.7% market share from survey area)
- Bluewater (4.5% market share from survey area).

2.18 Reflecting their more limited comparison goods shopping offer, aside from Lewisham town centre other destinations in LBL do not feature prominently in the household survey results as comparison shopping destinations; for example Catford town centre has market share from the study area of 1.9%, Sydenham district centre has a market share of 1.7% and Forest Hill district centre has a market share of 1.4%. LBL's two main concentrations of out-of-centre retail warehousing, at Bromley Road (between Catford and Bellingham) and Bell Green (near Lower Sydenham) attract market shares of 2.7% and 2.0% respectively from the survey area.

Convenience (food) shopping patterns

2.19 Convenience goods shopping is a more localised activity, meaning a greater proportion of spend is typically captured at the local level. Most parts of the Borough are well-provided for in terms of foodstores (with the exception of the district centre at Blackheath), and any expenditure leakage outside the survey area which does take place is only to locations a short distance outside the survey area boundaries, such the large Asda, M&S and Sainsbury's store in Charlton.

2.20 The household survey found that the most popular destinations for convenience goods shopping for residents in the survey area are:

- Sainsbury's, Bell Green, Sydenham (out-of-centre)
- Sainsbury's, Lee Green (in-centre)
- Sainsbury's, Lewisham town centre (in-centre)
- Tesco, Lewisham (edge-of-centre)
- Sainsbury's, Forest Hill (in-centre)
- Sainsbury's, New Cross Gate (in-centre)
- Aldi, Catford (in-centre)
- Marks & Spencer, Lewisham town centre (in-centre).

2.21 The 2017 Study found that most foodstores in the Borough are trading strongly, and have turnovers which are substantially in excess of 'benchmark' levels. Foodstores are trading particularly strongly in the Lewisham, Lee Green, Sydenham and Forest Hill areas. The Tesco store in Catford is considered to be trading at below average company levels, as are foodstores in the Deptford and New Cross areas (although the difference to company average levels in these areas are less marked). The strong trading performance of foodstores in the Lewisham area is likely to have been tempered by the subsequent opening of a new Asda store at Loampit Vale, on the edge of the town centre.

Commercial leisure visit patterns

2.22 The household survey results identified that going to theatres, museums or arts centres was the most popular leisure activity for residents in survey area, with 60% of residents stating they undertake in this activity, followed by visiting the cinema (59% of respondents), visits to restaurants (56%), visits to cafes (42%) and using health and fitness clubs (33%). The absence of a multiplex cinema in the Borough and the poor range of cafes, restaurants and bars in Lewisham town centre represent the major qualitative gaps in the commercial leisure offer.

Quantitative need

2.23 The study identified the following quantitative need for additional class A1 retail floorspace in the Borough:

- **Comparison goods:** between **10,200 sq.m net and 17,100 sq.m net additional floorspace by 2026, i**ncreasing to (indicatively) between 28,800 sq.m net and 35,600 sq.m net additional floorspace by 2033.
- **Convenience goods:** between **9,300 sq.m net and 11,900 sq.m net additional floorspace by 2026,** increasing to (indicatively) between 10,100 sq.m net and 12,700 sq.m net additional floorspace by 2033.

2.24 For comparison goods, the forecasts set out above were split between requirements for Lewisham town centre, Catford town centre, and a combined requirement for district centres. For convenience goods, a Borough-wide capacity figure was identified. The range of need figures for each type of floorspace reflects the fact two major developments – the Lewisham Gateway and Leegate Centre redevelopments – had not secured planning permission at the time of preparation of the study. Accordingly, two scenarios were tested – one assuming the developments would be granted permission and therefore would act as 'claims' on the need for new floorspace, and the second testing the level of need which would arise if these developments did not come forward.

2.25 In this report, we provide a full update to the quantitative need figures summarised above, meaning these figures will be superseded.

3. Policy update

Introduction

3.1 In this section we provide a brief update to the national, regional and development plan position within which this Update study has been prepared.

National Planning Policy Framework (2019)

3.2 In 2019 Government released an updated version of the NPPF, with a focus on improving the delivery of high quality, well-designed homes in the areas where people want to live, as well as an increased emphasis on the requirement for local authorities to develop strategic policies which should 'as a minimum' provide for the objectively assessed needs of an area.

3.3 The thrust of the policies in NPPF2 in respect of its 'town centres first' approach, and requirement for planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period, remains unchanged. A presumption in favour of sustainable development remains at the heart of the Framework.

3.4 Paragraph 8d of the NPPF states that local planning authorities' planning policies should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead.

Draft London Plan (Minor Suggested Changes, 2018)

3.5 The Mayor of London published the Draft London Plan (DLP) for consultation in December 2017, with a 'Minor Suggested Change' draft following in July 2018. The DLP, as the overall strategic plan for London, sets out the economic, environmental, transport and social framework for the development of London over the next 20-25 years. This strategic framework in turn guides boroughs' development plans, to ensure that the Mayor and Boroughs are 'working towards a shared vision for London'.

Good Growth and Opportunity Areas

3.6 The concept of Good Growth – growth that is socially and economically inclusive and environmentally sustainable – underpins the DLP and ensures that it is focused on delivering sustainable development.

3.7 The DLP identifies a total of 47 'Ongoing Opportunity Areas' (OAs) across Greater London, which are the areas of the capital which will see the most significant change. OAs typically contain capacity for at least 5,000 net additional jobs or 2,500 net additional homes (or a combination of the two). There are two OAs which fall wholly or partly within LBL – New Cross/Lewisham/Catford OA and Deptford Creek/Greenwich Riverside OA. The northern boundary of the Borough also lies proximate to a further identified OA at Old Kent Road.

New Cross / Lewisham / Catford OA

3.8 This OA covers a large swathe of the northern part of the Borough, which the DLP identifies to have capacity for up to 13,500 new homes and 4,000 new jobs. The DLP identifies that there remain 'significant opportunities for redevelopment, especially around stations', which, in the case of New Cross Gate and Lewisham town centres, will be enabled by the proposed extension of the Bakerloo line (see below).

3.9 Paragraph 2.1.17 of the DLP confirms that Lewisham town centre will grow both in terms of function and its residential population, and that the centre has potential to become a Metropolitan centre over the lifetime of the Plan, and acknowledges the intensification of the town centre retail and commercial functions which are taking place, adding that 'Public realm and environmental enhancements of the town centre and surrounding employment, mixed-use and residential re-developments will continue to be delivered and will assist the continued transformation of Lewisham into a high performing and vibrant retail hub with excellent leisure services.'

3.10 Catford is identified as having 'potential for significant urban renewal', with large-scale redevelopment of five key opportunity sites – Catford Shopping Centre & Milford Towers, Laurence House, Town Hall & Civic Centre, Plassy Island retail park, and Wickes and Halford retail warehouse units – expected to transform the town centre by 2026. The DLP states that there is 'scope to restore the fractured town centre and to re-invigorate it by booting the existing civic and cultural facilities and by providing an improved retail, office and leisure offer'. The scope for 2,700 new dwellings to be accommodated in the town centre to support its regeneration is identified. The DLP also confirms the long-proposed re-alignment of the A205 South Circular to aid in the transformation of the town centre, and, in the long term, suggests that a phase 2 extension of the Bakerloo Line could unlock further development potential.

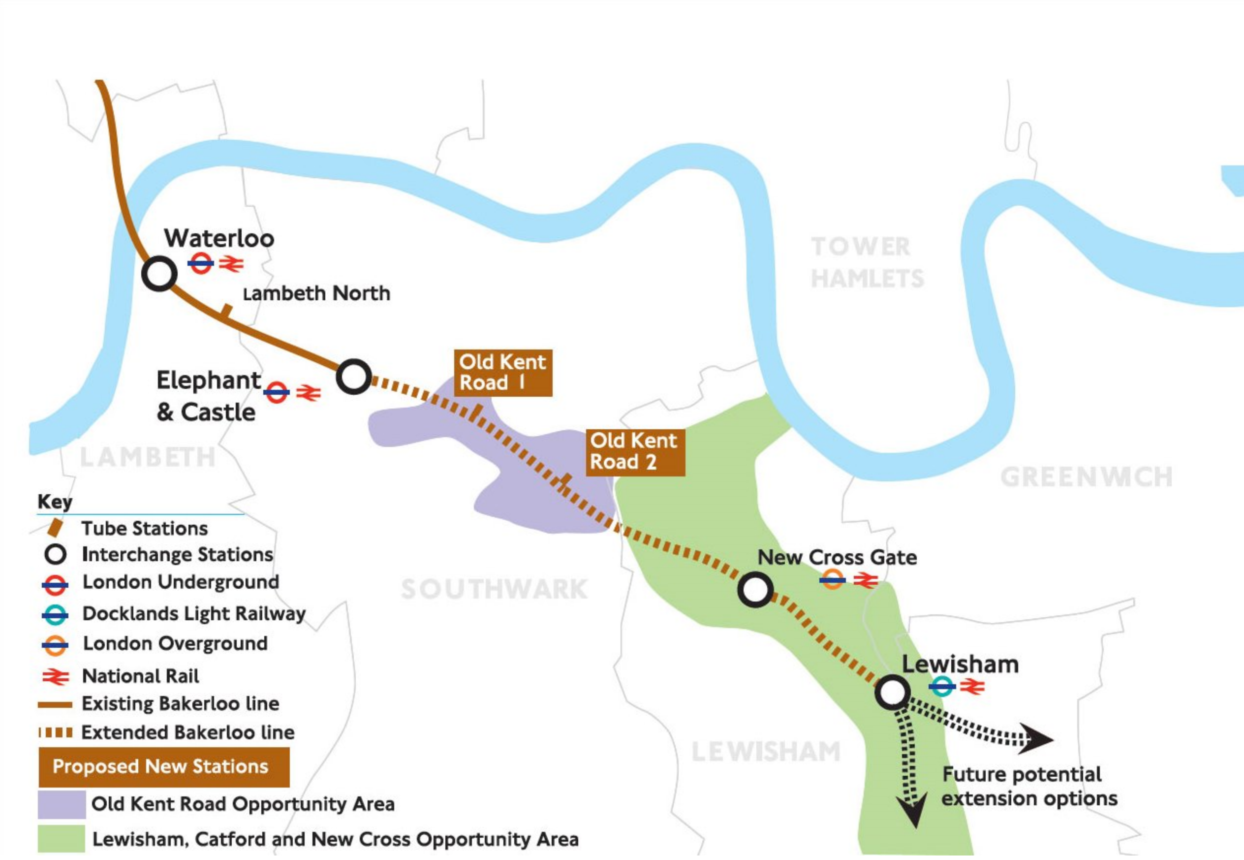
3.11 including three which fall wholly or partly within Brent -- Wembley, Burnt Oak/Colindale and Brent Cross/Cricklewood. A fourth – Old Oak and Park Royal – where a Mayoral Development Corporation is the local planning authority, covers parts of Brent, Ealing and Hammersmith and Fulham. It sits immediately to the south west of the Borough and offers potential for parts of Brent to benefit from the development which will occur here. The DLP states that the Opportunity Areas have potential to deliver a 'substantial number' of the new homes and jobs which London needs.

Bakerloo Line extension

3.12 The DLP confirms the intention of the Mayor to extend the Bakerloo Line southwards from its current terminus of Elephant & Castle to Lewisham. The route will run south-eastwards from Elephant & Castle via Old Kent Road (where there will be two new stations serving the Old Kent Road OA) to New Cross Gate before terminating at Lewisham town centre, at a new interchange station with existing public transport connections. Both new stations in Lewisham Borough will be in town centre locations.

3.13 The DLP also identifies that there is 'potential for future extensions of the scheme beyond Lewisham', but does not identify a preferred route for this. However, it states that 'planning frameworks should identify the development opportunities which are made possible as a result of the Bakerloo Line extension, as well as how this would be phased to reflect the connectivity and capacity benefits it unlocks'.

Figure 3.1 Route of proposed Bakerloo Line extension to LBL



The role of town centres

3.14 Policy SD6 of the DLP sets out the Mayor's approach to town centres across London, with the DLP making it clear that the vitality and viability of London's town centres should be promoted and enhanced by 'encouraging strong, resilient, accessible and inclusive hubs with a diverse range of uses that meet the needs of Londoners, including main town centre uses, night-time economy, civic, community, social infrastructure and residential development uses.' The role of town centres as a focal point for Londoners' sense of place and local identity should also be strengthened.

3.15 Reflecting the changes in shopping habits which the 2017 Study identified (as reviewed and updated in the previous section), the DLP states that the 'The adaption and diversification of town centres should be supported in response to the challenges and opportunities presented by multi-channel shopping and changes in technology and consumer behaviour, including improved management of servicing and deliveries'.

3.16 Policy SD6 also identifies the potential for new housing development within and on the edge of town centres should be realised through higher-density mixed use or residential development which makes best use of land. The particular suitability of town centres to accommodate a diverse range of housing should be considered and encouraged.

Development principles

3.17 The London Plan takes a strong town centres first approach, confirmed under Policy SD7, which reflects the approach of the NPPF in requiring applications for development not within a defined centre to demonstrate compliance with the sequential and impact tests. Policy SD7 also states that, inter alia, development plans should take a town centres approach by realising the potential of existing out of centre retail and leisure parks to deliver housing intensification through redevelopment (whilst not delivering a net increase in out-of-centre retail/leisure floorspace).

3.18 Policy SD7 continues to state that in preparing development plans, boroughs should:

- define the detailed boundary of town centres, along with specific policy-related designations such as primary shopping areas, primary and secondary frontages (the DLP does not reflect the most recent iteration of the NPPF in this respect) and the night-time economy.
- consider the protection of out-of-centre high streets as neighbourhood centres, local parades or business areas and develop appropriate policies to support and enhance the role of these high streets.
- Identify centres that have particular scope to accommodate new commercial development and higher density housing.
- identify sites suitable for intensification, which may include supermarket sites, surface car parks or edge of centre retail/leisure parks; town centre shopping frontages which are surplus to demand, and redevelopment of low-density town centre buildings which are not of heritage value, as well as delivering residential above existing commercial, social infrastructure and transport infrastructure uses.
- support flexibility for temporary or 'meanwhile' uses of vacant properties.

Town centre network

3.19 Policy SD8 of the DLP sets out the approach to the management of the town centre network across Greater London, and is supported by an updated classification of each centre in the town centre hierarchy at Appendix 1. The current classification of centres in Lewisham Borough remains unchanged from the extant London Plan (Consolidated with alterations since 2011) (2016), as reviewed in the 2017 Study, although an important change is the identification of Lewisham town centre as having 'future potential' as a Metropolitan Centre.

3.20 International, Metropolitan and Major Centres should be the focus for higher-order comparison goods retailing; district centres should focus on the 'consolidation of a viable range of functions', particularly convenience goods retailing, leisure, social infrastructure, local employment and workspace. District centres should also 'address the challenge of new forms of retailing and securing opportunities to realise their potential for higher-density mixed use residential development and improvements to their environment'.

Strategic Areas for Regeneration

3.21 Those parts of Greater London which fall within the 20% most deprived areas in England (based on the Index of Multiple Deprivation) are identified in the DLP as 'Strategic Areas for Regeneration' (SAFR). In a number of cases, SAFR overlap with town centres, and the majority of the Borough's town and district centres fall within SAFRs, namely Lewisham and Catford major town centres, and all of its district centres within the exception of Blackheath and Lee Green.

Lewisham Borough Development Plan

3.22 The current development plan for Lewisham Borough comprises the following documents:

- LBL Core Strategy (adopted 2011)
- Site Allocations Local Plan (adopted 2013)
- Lewisham Town Centre Local Plan (adopted 2014)
- Development Management Local Plan (adopted 2014)

3.23 There has been no change to the development plan position at the local level since the 2017 Study, and therefore we do not provide a summary of them as part of this Update; the relevant documents are reviewed in full in Section 2 of the 2017 Study.

3.24 The council has progressed work on preparing planning guidance to support implementation of the development plan policies and also evidence base documents to inform a Local Plan review, including:

Surrey Canal Triangle SPD

3.25 The Council will be preparing a Supplementary Planning Document (SPD) for the area known as the Surrey Canal Triangle. The Surrey Canal Triangle is a strategic site allocation in the Council's Core Strategy Document which was adopted in June 2011. The allocation includes ambitions for extending Millwall Football club's stadium, mixed use business space, new housing, a potential new train station and various other community facilities. A public consultation on a Design Framework and Strategic Environmental Assessment screening commenced in September 2019 and will inform preparation of the guidance document.

New Cross Area Framework and Station Opportunity Study (2019)

3.26 This study establishes an evidence base that allows insight into the life of New Cross, its economy and built environment and how that can be reinforced and improved. The study will be used by the council, the Greater London Authority and Transport for London as they work with local communities to plan for the future of New Cross through projects like the LB Lewisham Local Plan, the Mayor's London Plan, and the design of new Bakerloo line infrastructure. A Station Opportunity Study for New Cross Station and its surrounds is a key component of the study. This includes consideration of how a Bakerloo line station at New Cross Gate can complement the vision and opportunity for New Cross.

Other relevant publications

Planning reform: supporting the high street and increasing the delivery of new homes (Government consultation, 2018)

3.27 In October 2018, Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.

3.28 Part 1 of the consultation includes proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. Government is proposing new PD rights to allow existing premises in typical high street uses to change to a wider range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.

3.29 With the rise of internet shopping, and the change in how people use the high street, the consultation highlights that it is timely to consider how the operation of the Use Classes Order can support greater flexibility. It notes the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands. The changes to PD and use class order which were consulted on can be summarised as follows:

- Allowing class A1, A2, A5, betting shops (SG), payday loan shops (SG) and laundrettes (SG) to change to class B1 (office) use under PD;
- Allowing class A5 to change to class C3 (residential) under PD;
- Ensuring that the A1 (retail) use classification remains modern and current (i.e. whether the current range of goods listed as class A1 use remained fit for purpose); and
- Replacing A1, A2 and A3 with a single use class to cover shops, financial & professional services, restaurants and cafes.

3.30 The latter change has particularly important implications for the Borough's town centres. It would bring greater flexibility but reduce the ability of communities and local planning authorities to distinguish between shops and restaurant uses; given current PD rights, it effectively allows change of use from A1 shop to A3 café/restaurant without planning permission. A4 public houses and A5 take-aways would remain separate to this.

3.31 Government have indicated an intention to proceed with the changes set out in the consultation document (see below), meaning that an Article 4 direction to remove permitted development will potentially be required in order to protect defined A1 frontage within a centre, and avoid dilution of this type of town centre concentration. Further clarification from the Government on this point is expected, and the Council is advised to monitor for the publication of further advice and ensure appropriate development management controls are put in place, if required.

3.32 Government published their response to the consultation in May 2019. This confirmed:

- The intention to proceed with changes to PD set out above.
- The intention to 'amend the shops use class to ensure it captures current and future retail models, which will include clarification on the ability of the A use classes to diversify and incorporate ancillary uses without undermining the amenity of the area.' Further clarification on this point is yet to be published.

The High Street Report & Future High Streets Fund (2018)

3.33 In December 2018, the Government published 'The High Street Report', setting out the findings of the 'High Streets Expert Panel' which was established earlier in 2018. The Panel sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help.

3.34 The publication of the Report followed on from the announcement in the budget of Autumn 2018 of a £675m 'Future High Streets Fund', set up to help local areas respond and adapt to the changes facing town centres. The Fund will support local areas in preparing long term strategies for town centres, including funding a new High Streets Task Force to provide expertise and support to local areas. It will also co-fund investment projects in town centres, either in the form of physical infrastructure (including the regeneration of heritage high streets) or investment in land assembly, for example to support the densification of residential and workspace in town centres in place of under-used retail units.

3.35 The High Street Report provided recommendations on how the above measures should best be implemented to ensure town centres could maximise benefits. These included:

- making the Task Force the 'single voice' for town centres; facilitating cross-sector networking and skills building; and act as provider of access to expert help and support.
- That the Future High Streets Fund should interact with the Task Force to increase the impact of both; should fund places with community involvement in their town centre; and fund towns that demonstrate a clear vision and cross-sector leadership.
- In addition the report recommended a number of additional interventions to help facilitate town centre revitalisation, including that towns should improve the 'housekeeping' of their town centres, including creation of a 'National High Street Perfect Day'; that local authorities should 'use initiative' to encourage landlords and tenants to think innovatively about how to use empty properties; and that towns should ensure that parking restrictions/charges are not discouraging town centre use.

3.36 Alongside the High Street Report, a second report 'High Street 2030: Achieving Change' was published, setting out the findings of workshops undertaken by the Institute of Place Management to collect evidence to support the development of town centre policy.

High Streets For All (2017)

3.37 We Made That and LSE Cities were commissioned by the GLA to analyse the social value of London's high streets – i.e. their importance in economic, social and environmental terms (either singularly or combined). The study sought to identify how these different strands can be identified and expanded, in order to enable the GLA to make appropriate intervention and investments in London's network of high streets and town centres.

3.38 The study identified ten key findings:

- High streets are significant and growing places of employment – 47% of businesses outside central London are on a high street; 1.45m employees work on within 200metres of a high street – this number is growing.
- High streets offer local and accessible economic opportunities for an inclusive London
- High streets promote community and cultural exchange. Survey work undertaken in support of the report identified that 45% of users' primary high street use was non-retail related.
- High streets are important gathering spaces for marginalised and under-represented groups
- High streets provide crucial social infrastructure and social services.
- Nearly 70% of London's high streets do not fall within a town centre boundary, meaning that they have no formal policy designation and are therefore vulnerable to development pressures.
- High streets provide a range of work spaces which can meet the needs of newly-formed and long-standing businesses.
- High street businesses struggle to operate (nearly 70% of small businesses find rent to be unaffordable) and participate in 'collective efforts' e.g. collaborating with each other or the local community due to pressures such as rent, sales, competition and time commitments.
- High streets are local, walkable destinations and important points of connectivity, with 63% of survey respondents saying they walk to their local high street.
- Perceptions of urban change are perceived acutely on London's high streets.

4. Market context update

4.1 In Section 3 of the 2017 Study, we identified a number of trends in the retail and leisure sector which have influenced how people use town centres which, in turn, has important implications for the future spatial planning of centres and their long-term vitality and viability. Many of these trends have been well-documented in recent years and can broadly be summarised as follows:

- National/global economic trends;
- Growth in online shopping/multi-channel retailing;
- Changes in property/space requirements of retail and other town centre operators;
- An evolution in the role and function of many town centres away from retail and becoming more multi-dimensional 'destinations', with particular growth in the commercial leisure sector.
- Changes in the convenience goods sector, with a growth in discount retailers and switch towards 'little and often' food shopping.

4.2 The pace of change in the sector has continued since the publication of the 2017 Study, with extensive further evidence published that confirms that in order to remain vital and viable locations, town centres will need to continue to evolve and adapt. The trends support and reinforce the position in the Draft London Plan, as summarised in the previous section.

4.3 We present an update to each of the key sectoral changes summarised above in the sections below.

Economic trends

4.4 In the 2017 Study, we identified that the UK's decision to leave the EU could potentially impact on economic growth, although at the time of the publication of the study there had been no data published by our data provider, Experian, to confirm this.

4.5 Experian have subsequently published two updates to their 'Retail Planner Briefing Note', the most recent of which was published in December 2018. This report sets out guidance on forecast expenditure growth rates and forecasts of 'special forms of trading' (e.g. online shopping), which we have incorporated into our updated retail capacity forecasts. Further details of this are set out in the following section.

4.6 Experian forecast that the UK economy will remain on a 'sluggish growth trajectory' for the next couple of years, amid ongoing uncertainty over the final outcome of Brexit negotiations. Experian consider that this uncertainty '*is likely to keep businesses and households cautious, and hence growth in both investment and consumer spending is likely to remain lacklustre. The recent loosening in the Government's fiscal stance is unlikely to offset the drag on the domestic economy*'.

4.7 In the medium term, Experian forecast that if a 'soft' Brexit deal is successfully struck (i.e. one which the UK gaining similar access to the single market as it does currently), then a return to a 'long run average of growth' from 2023 onwards, with economic growth remaining constrained during the transition period. Experian advise that once a deal is struck, there is potential for a bounce-back in the economy as uncertainty clears, although this is likely to be dependent on the length of time it takes to conclude an agreement.

4.8 Should a 'soft' Brexit deal not be concluded, and a 'hard'/no deal Brexit prove to be the outcome of negotiations (or an agreement is not concluded within 4 years), this would result in a longer period whereby business plans and consumer spending are undermined by uncertainty, potentially reducing expenditure growth rates over the medium term. The long term economic consequences of Brexit will ultimately be dependent on the terms of the new UK-EU relationship.

Growth in online shopping & multi-channel retailing

4.9 As the 2017 Study set out, online shopping has become a firmly established method of shopping, and has delivered both challenges and opportunities for the traditional town centre. The boundaries of physical and online retail are becoming increasingly blurred as a result of mobile and app-based shopping, together with quasi-retail trends such as 'click & collect'.

4.10 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits In 2018:

- 90% of households now have Internet access, an increase from 83% in 2013 and 65% in 2008.
- 86% of adults use the Internet every day. Daily internet usage has more than doubled since 2008.
- 78% use mobile phones/smartphones to access the Internet. In certain age groups this figure is substantially higher: in the 25-34 year old age group, the figure is 99%; for 16-24 year olds it is 98%; and for 35-44 year olds it is 96%.
- 78% of adults have bought goods or services online in the last 12 months, up 1 percentage point since 2017 and 25 percentage points since 2008.
- 95% of adults in the 16-24 year old age group shop online, and 96% of adults in the 25-34 year old age group shop online. By contrast, only 48% of those over 65 years shop online – however this age group has shown the largest increase in online shopping uptake, increasing from 16% in 2008.

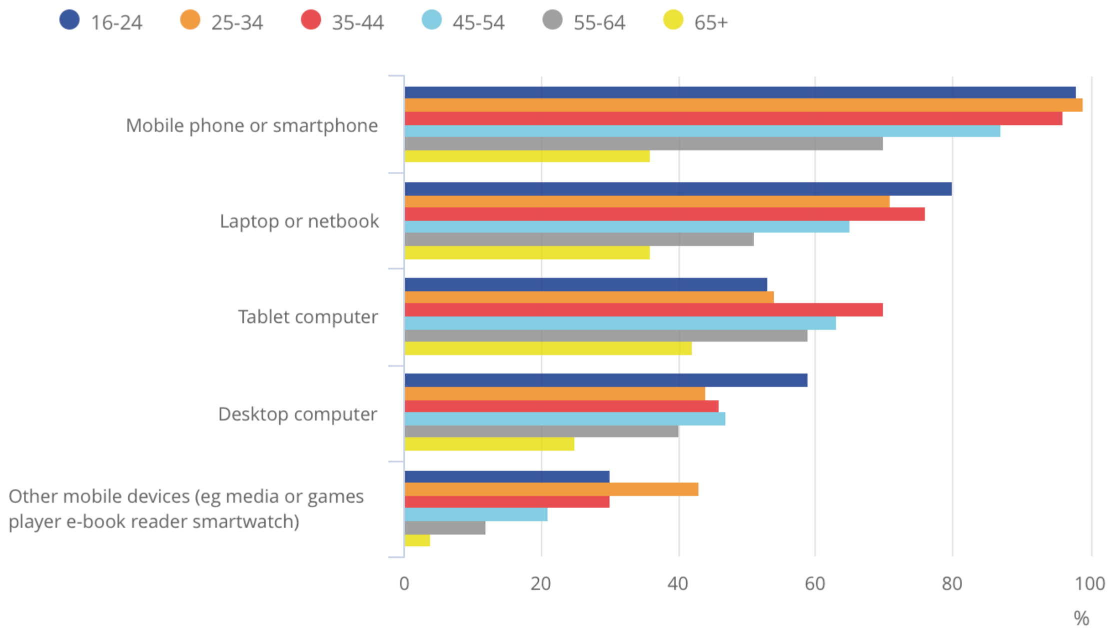
Frequency and nature of online shopping

4.11 When looking at the frequency of online shopping and the amount typically spent online, it can be seen that considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The ONS identifies that:

- Of those adults who purchased online in the last three months, adults aged 16-24 typically shopped online once or twice; however those in the 25-34, 35-44 and 45-54 age groups most typically shopped online at least ten times over a three month period. In the 35-44 age group, 48% shopped online more than ten times over the three month period.
- Across all age groups, shoppers typically spent between £100 and £499 online in the last three months. In the 35-44 year age group, 30% of adults spent over £1,000 online in the three month period.

4.12 In terms of the range of goods sold, the most popular categories for goods bought online are clothes and sports goods (purchased by 55% of adults within the last twelve months), followed by household goods (e.g furniture, toys); holiday accommodation; tickets for events; travel arrangements (e.g. train tickets, car hire); and films and music (including downloads). Figure 4.1 shows the frequency of purchase of each of these types of goods by age group.

Figure 4.1 Online purchases by age group in Great Britain, 2018



Source: Office of National Statistics

4.13 Four out of the six goods categories listed above (clothes/sports goods, household goods, holiday accommodation and films/music) are those which historically been purchased through physical stores, and the shift of spending to online platforms in these sectors has resulted in a number of operators ceasing trading, reducing their network of physical stores, or moving from a mixed physical/online to online only platform.

4.14 Online-only retailers selling fashion goods - such as ASOS, Amazon and Boohoo for example – now account for 38% of the UK online fashion market. These retailers do not have a physical high street presence, and are therefore able to be more responsive to new trends in the sector, and also do not have the overheads associated with 'bricks and mortar' stores, enabling them to be more price-competitive.

Clothing and homewares retailers

4.15 Trends in the clothing and homewares sectors are particularly important to monitor, as in higher-order centres ('major' centres or above in the London Plan retail hierarchy), clothing operators and department stores (for household goods) can act as retail 'anchors' and footfall drivers, and typically trade from amongst the largest units in town centres. The impact of a closure of these stores can therefore have wider implications on the vitality and viability of a centre. The health checks of centres in Lewisham Borough in the 2017 Study showed that the Borough's major centres had remained largely resilient.

4.16 Both clothing retailers and department store and general merchandise/homewares retailers have been impacted by the above shift towards multi-channel retailing, meaning that, when coupled with often high levels of business rates and rental agreements, the trading viability of stores has often become more marginal. For example, since the 2017 Study was published:

- the department store House of Fraser has closed a number of stores having entered administration in 2018, and Debenhams confirmed plans in April 2019 to close 22 underperforming stores. Neither retailer has any representation in Lewisham Borough.

- Marks & Spencer confirmed that it would close 100 stores by 2022, many of which would be its traditional 'clothing and home' branches. Other stores have been converted to food-only stores. The only full-line M&S branch in Lewisham Borough, in Lewisham town centre, currently remains unaffected.
- Arcadia Group (which owns fashion brands including Topshop, Topman, Burton and Dorothy Perkins) recently announced plans to close branches, and fashion retailer New Look has closed 60 of its branches, including its store in Lewisham Shopping Centre.
- 2018 saw a number of other long-standing retailers entering administration, in many cases resulting in extensive store closures. These included Poundworld, Maplin, Toys R Us and HMV, although the latter was subsequently acquired from administration and the majority of stores remained trading.
- Administrations to date in 2019 include value clothing retailer Select, upmarket clothing retailer LK Bennett, and café chain Patisserie Valerie.

4.17 However, other fashion and household/general merchandise retailers continue to perform well, particularly those at the middle to value end of the market. As identified previously, H&M are upsizing their presence in Lewisham town centre, taking over the former BHS unit, and the company has recently launched standalone 'H&M Home' stores in central London and Westfield London. Primark have recently opened their largest store to date in Birmingham city centre. Other retailers such as Next, TK Maxx, B&M, Sports Direct (and other brands owned by the same parent company such as Flannels and USC) and Wilko also continue to actively expand their store portfolio and invest in town centre locations.

4.18 Importantly for town centres however, Mintel's 'Online Fashion UK 2017' report found that only 15% of online shoppers buy all of their fashion items online - with the remaining 85% using both online and physical stores. Mintel state that this highlights the importance of having a 'joined up' shopping experience. Many retailers are embracing this - as well as 'click and collect' (discussed below), many retailers now offer the ability to check stock levels in a particular store on their website, thus avoiding a wasted trip if a customer wants to buy a specific item, and/or offer in-store kiosks or tablets which enable a wider range of products and sizes to be browsed and ordered by a customer.

Click & Collect

4.19 The click & collect sector continues to benefit from increasing levels of take-up, and research from GlobalData indicates the click & collect market will grow by a further 46% by 2023. Click & collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of the operator. The popularity of click & collect is clearly an important opportunity for town centres, as it can act as a footfall generator in its own right. GlobalData research identify that 39% of consumers make an additional purchase when collecting an item from a store.

4.20 Since the 2017 market the Click & Collect has continued to advance, as efficient delivery options become an expected norm for consumers. Delivery windows are shortening, with retailers such as Next now offering one hour delivery in certain areas. Most major retailers have also partnered with courier companies such as DPD and Collect+ to offer click & collect facilities at an ever-growing network of other collection points such as local newsagents, post offices or Amazon lockers.

The commercial leisure sector

4.21 The 2017 study identified the increasing role which commercial leisure is playing in the vitality and viability of town centres, as the nature of retail and high street shopping continues to evolve. In many new town centre schemes, leisure has replaced retail as the 'anchor' tenant to a scheme.

4.22 'Family dining' restaurants increased in popularity considerably in the years following the last recession, reflecting a wider trend for a higher proportion of consumer expenditure to be spent on socialising and leisure activities rather than shopping. These restaurants have also benefited from many new town centre development schemes having an increasing leisure-orientated focus, enabling them to play a complementary role to a nearby new cinema, for example, as part of the creation of an attractive leisure destination.

4.23 Long-time mainstays of the family dining sector such as Pizza Express, Nando's, Café Rouge and Zizzi expanded and generally continue to perform well. These were joined by a new wave of operators such as Byron, GBK, Franco Manca, Pho and Bill's, who have significantly expanded store numbers in recent years, often with the backing of private equity firms.

4.24 There are signs, however, that this sector of the market may be approaching saturation, and the increased competition in the sector is leading to causalities. Jamie's Italian has recently announced plans to close the majority of its branches; Byron is undergoing restructuring and has closed 20 outlets, and Strada has closed one third of its branches. Analysts suggest in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators' profits, whilst the Brexit decision has, as we have set out above, negatively impacted on consumer confidence and therefore spending.

4.25 The cinema market continues to perform strongly, benefiting from consumers choosing to spend more of their disposable income on leisure activities. As we have set out in the previous section, new cinemas are planned in Lewisham and Catford town centres. New cinemas have also opened in recent months just outside the Borough in West Norwood (Picturehouse) and Crystal Palace (Everyman) which have potential to attract custom from some residents in Lewisham Borough.

The convenience sector

4.26 The 2017 Study identified the scale of change that had taken place in the convenience sector in recent years, described by data providers Mintel as 'the trends of the whole of the post-war era [being] reversed'. To recap, the key changes in the sector are as follows:

- Superstores are seeing a reduction in market share;
- Convenience (small-format) stores of the market leaders (e.g. Sainsbury's Local, Tesco Express) and Co-Op are gaining market share;
- 'Discount retailers', principally Aldi and Lidl, are achieving strong levels of growth;
- Certain retailers which are classified as non-food retailers (for example Marks & Spencer, Home Bargains and Poundland) are increasing their share of food spending;
- Online demand is continuing to grow.

4.27 Since 2017, the above trends have continued:

- Marks & Spencer are predominantly focussing future growth on expanding their food sales, and in 2019 announced plans to open a number of larger-format foodhalls.
- Aldi and Lidl continue to grow their store numbers and attract an increasing share of the grocery market – Aldi's market share has increased from 3.0% in 2013 to 7.8% in 2018, and Lidl's has increased from 2.8% to 5.5% over the same period. Both operators are actively expanding in London, and Aldi have opened smaller-format 'metro' stores on high street locations in Kilburn, Tooting and Balham. In late 2018, Tesco opened its own discount-format retailer, Jack's, in a number of converted Tesco stores. It has yet to launch the brand in London.
- Convenience (small-format) stores continue to open, although not at the pace seen in recent years as availability of sites becomes exhausted. However Co-Op in particular are actively expanding their store portfolio as well as refurbishing existing stores.
- New larger-format supermarket developments are rare (except discount retailers), with the major operators instead focused on making their existing store networks trade more efficiently.

Banks & financial services

4.28 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in centres at all levels in the hierarchy, the presence of a wide range of banks and building societies formed an important part of a centre's mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.

4.29 The total number of branches operated by the 'big six' UK banks (Barclays, HBOS, HSBC, Lloyds, Natwest and Santander) declined from 11,240 in 1997 to 7,022 in 2014[1], although in some locations this decline has been partially offset by the emergence of 'challenger' banks such as Metro Bank, Virgin Money and TSB, with the former of these in particular rapidly expanding its High Street presence. The pace of closures has gathered pace in recent years however; for example in 2017, RBS announced plans to close one quarter of its branch network.

4.30 According to research from CACI, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017.

4.31 Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in primary shopping areas, which are in some instances challenging to let.

4.32 It would appear that, for the time being at least, banks and building societies are generally keen to retain a visible presence in larger/higher-order town centres, but smaller branches in lower-order centres with a more limited customer base appear more vulnerable.

[1] Parliament Research Briefing on bank closures, 2018 researchbriefings.files.parliament.uk/documents/SN00385/SN00385.pdf

5. Changes to data inputs

5.1 In this section we set out a summary of the changes to the key data inputs into the quantitative retail capacity modelling which we have made in order to update the Borough's quantitative retail need forecasts. These changes relate to the following principle data inputs:

- Population estimates
- Expenditure growth estimates
- 'Special forms of trading' e.g. online shopping
- 'Commitments' – extant planning permissions for new class A1 retail floorspace

Reporting years

5.2 The 2017 Study forecast quantitative need for the Borough over the period to 2033, with interval 'reporting years' at five years intervals of 2021, 2026 and 2031, along with a final shorter interval period to 2033. The new Lewisham Local Plan is expected to cover a timeframe of 2020-2040, and therefore for the purposes of this Update we have adjusted the interval 'reporting years' to 2025, 2030, 2035 and 2040. The study 'base year' is set at 2020.

5.3 As set out in the 2017 Study, it is recommended that forecasts beyond the short/medium term (which, for the purposes of this Update, should be considered to be beyond 2030) are considered indicative, owing to the difficulties associated with accurately forecasting long-term economic trends.

Population estimates

5.4 To calculate the population for each of the survey zones, the 2017 Study used bespoke population estimates provided by Experian at the zonal level for the study base year, which are past trends-based population estimates. To calculate the future population of each of the survey zones, we used 2014-based ward-level population projections provided by the Greater London Authority. This was done by assigning each ward within the study area to one of the ten survey zones, and calculating an aggregate growth population growth rate for all of the wards which fall within each zone.

5.5 For this Update, we have adopted the same approach to calculating future survey area population, but have updated the population forecasts using growth rates derived from 2016-based ward level population projections provided by the GLA. These have been applied to the base year population estimate and projected forward to the new study end period of 2038.

5.6 Table 1 of Appendix 1 shows that the population of the survey area is 751,002 persons at the study base year of 2020. This is forecast to increase to 811,703 persons by 2030 (an increase of 9.9% from 2020) and 880,163 persons by 2040 (an increase of 23.2% from 2020). The population of the survey area is therefore expected to increase by over one-fifth by 2040.

Expenditure growth estimates

5.7 As set out in the previous section, Experian anticipate that consumer spending is expected to be weaker in the short to medium term, as consumers continue to exert caution in light of the ongoing uncertainty over Brexit.

5.8 The per capita expenditure growth forecasts which we have applied to our updated retail capacity forecasts are Experian's 'central case' forecasts set out in the company's Retail Planner Briefing Note 16 (published December 2018)[2]:

- For comparison goods, the expenditure growth rates are marginally lower than those used in the 2017 Study in the short to medium term. Experian forecast that per capita expenditure growth on comparison goods will peak at 3.3% per annum between 2020 and 2025, before reducing to 3.0% per annum for the remainder of the Plan period.
- For convenience goods, the 2017 Study identified low levels of forecast expenditure growth of 0.1% per annum. Experian continue to forecast convenience goods expenditure growth of 0.1% per annum, and this figure is therefore unchanged for the purposes of this Update.

'Special forms of trading'

5.9 'Special forms of trading' (SFT) is the term given by Experian to retail purchases not undertaken in 'bricks and mortar' stores. Most of SFT is accounted for by online shopping. Experian's Retail Planner Briefing Note 16 provides estimates of current and future rates of SFT as far as 2037, and we have applied these to our updated baseline capacity forecasts[3].

5.10 For comparison goods, the proportion of total available expenditure which Experian forecast will be diverted to SFT has increased since the 2017 Study. For example, whereas the 2017 study applied an SFT rate of 15.0% at the first interval year of 2021, we now apply a figure of 20.7% at the revised first interval year of 2025. Over the longer term, the 2017 Study previously applied a SFT discount of 14.4% at 2033; in this study we apply a figure of 21.8% for the nearest equivalent reporting period, at 2035.. This means the amount of spending which Experian forecast is available to support physical retail floorspace has decreased since the 2017 Study.

5.11 Convenience goods SFT continues to account for a much smaller claim on total available expenditure, and the recent forecasts from Experian forecast convenience goods SFT to account for a marginally lower claim on total convenience spend than was the case in the 2017 Study.

5.12 Evidence from the household survey undertaken in support of the 2017 Study indicates that in some parts of the survey area, levels of online shopping are higher than the recently-published Experian figures shown in the table above. Therefore, as a scenario test, we have also modelled a higher level of SFT claim for the study area than the figures shown above. This is discussed further in Section 7.

Efficiency of existing floorspace

5.13 Built into the retail capacity analysis is an allowance for existing floorspace to improve its trading efficiency (i.e. sales density or turnover per sq.m) over the course of the new Local Plan period. Experian's Retail Planner Briefing Note advises that the company's forecasts for sales density have been revised upwards.

5.14 Experian state that 'ongoing budgetary pressures have pushed companies to increase sales efficiencies from current floorspace. Redevelopment of existing floorspace and new technology is assisting this trend. Weakened demand for retail property, stubborn levels of vacant units and a lull in retail construction point to limited prospects for expansion of retail floorspace over the next few years'.

5.15 For comparison goods, Experian forecast that existing retail floorspace will improve its sales density by 2.2% per annum over the period 2021-25 and 2.5% per annum thereafter. New floorspace will improve its sales density by 1.8% per annum and 1.5% per cent per annum over the periods 2021-25 and 2025 onwards respectively.

[2] Source: Experian Retail Planner 16 Figure 1a. Growth rates quoted at paragraph 5.7 reflect the Experian 'central case' forecasts

[3] For the final year of the study period at 2038 we have carried Experian's 2037 SFT figure forward to 2038

5.16 Lower levels of sales density growth are forecast for the convenience goods sector. For existing floorspace, Experian forecast that sales densities will grow by 0.4% per annum over the period to 2038, whilst new floorspace will achieve sales density growth of 0.2% per annum to 2025 and then no growth thereafter.

5.17 We have used the above figures in our updated capacity forecasts. For both comparison and convenience goods (in the case of existing floorspace), the efficiency rates are higher than were applied in the 2017 Study.

'Commitments' for new retail floorspace

Existing commitments

5.18 The 2017 Study made allowance for a number of 'commitments' for new class A1 retail floorspace in the Borough. Commitments are approved planning applications for new retail floorspace which were not trading at the time of the household survey, but once they do commence trading will act as a 'claim' on the amount of expenditure available to support new floorspace.

5.19 The 'commitments' identified in the 2007 Study are shown in **Table 5.1**. In the majority of cases, the approvals are for flexible floorspace, meaning a range of potential use classes could occupy the floorspace. We have, where necessary, made appropriate assumptions on the amount of A1 floorspace which could potentially come forward within each mixed-use permission.

5.20 The Council have confirmed that these permissions remain extant and therefore they have been carried forward into this study. Subsequent to the 2017 Study, some of the permissions have been built out and commenced trading; for example, the Asda store at Loampit Vale in Lewisham commenced trading at the end of 2016. However, as these developments were not accounted for in the household telephone survey, and there has been no new survey undertaken as part of this Update, we continue to treat the above as 'commitments'.

Table 5.1 Commitments for new class A1 retail floorspace

Application ref	Location	Floorspace	Status (June 2019)
TBC	Asda, Loampit Vale, Lewisham	A1 (convenience) only	Approved, completed
DC/06/062375 DC/18/105218	Lewisham Gateway, Lewisham town centre	7,725 sq.m (A1-A4)	Approved, under construction
DC/11/076357	New Bermondsey / Surrey Canal Triangle	3,000 sq.m (A1 and A2)	Approved, not started
DC/13/83358	Convoys Wharf, Deptford	5,810 sq.m (A1 and A2)	Approved (outline consent), not started
DC/15/092295	Oxestalls Road, Deptford	10,413 sq.m (A1-A5, B1, D1, D2)	Approved, under construction
DC/14/090032	Leegate Centre, Lee Green	3,847 sqm A1 foodstore + 1,588 sq.m A1-A3	Approved, not started. Scheme likely to be subject to amendment.

Source: Lewisham Council planning applications

5.21 At the time of preparation of the 2017 Study, two planning applications for major development at Lewisham Gateway and the redevelopment of the Leegate Centre (Lee Green district centre) were undetermined, and therefore retail capacity forecasts were presented both including and excluding these commitments. Both applications have subsequently been granted permission and therefore no equivalent scenario testing is presented as part of this update. The Lewisham Gateway site listed in the table above has been the subject of a subsequent approved Section 73 application (DC/18/105218) for a reduction in floorspace, and we have adjusted our turnover figures for this commitment accordingly.

New commitments

5.22 We have reviewed the London Development Database to identify any new permissions for net additional class A1 retail floorspace which have been granted subsequent to the publication of the 2017 Study. We have applied a threshold of 300 sq.m for new development, as development below this threshold is likely to be small/local-scale retail development.

5.23 From our analysis we have identified one additional commitment, which is the redevelopment of the Carpetright site at Loampit Vale, Lewisham (LPA ref DC/17/102049). This permissions seeks the redevelopment of the site for a mixed use, residential-led development which will include 960 sq.m of flexible retail floorspace for A1, A2, A3, B1 or D1 use. The quantum of floorspace proposed on the site is, in this instance, a net reduction from the existing retail warehouse unit (1,084 sq.m). However, as the approved floorspace is open A1 use, it is likely to generate a higher turnover than the bulky goods it is replacing; we have therefore factored a turnover uplift for this site into our analysis.

6. Updated 'baseline' quantitative need assessment

6.1 Having made the adjustments to the inputs to the capacity assessment set out in the previous section, below we set out the updated baseline quantitative 'need' forecasts for new convenience and comparison goods floorspace for Lewisham Borough over the timeframe of the new Local Plan period to 2038.

6.2 The quantitative need tabulations are set out in full at Appendix 1 (for comparison goods) and Appendix 2 (for convenience goods). The tables are structured as follows:

- **Table 1** shows the updated population projections for the survey area over the study period to 2038.
- **Table 2** shows the updated per capita expenditure projections for the survey area.
- **Table 3** multiples the population forecasts in Table 1 with the per capita expenditure forecasts in Table 2, to show the total available spend available to the survey area, including making allowance for SFT. It shows that total comparison goods spend in the survey area is £2,390.2m at 2020; this is expected to increase to £3,411.8m in 2028 and £5,014.6m in 2040. Table 3 of Appendix 2 shows that convenience goods spend available to the survey area is £1,463.2m at 2020; this is expected to increase to £1,569.9m at 2030 and indicatively £1,704.9m at 2040.
- **Table 4** shows the 'market shares' attracted to each comparison and convenience shopping destination within and surrounding the survey area, based on the findings of the household survey undertaken in support of the 2017 Study. As stated in Section 1, the existing household survey findings are considered to remain robust and no new survey work has been undertaken for the purposes of this Update.
- **Tables 5a, 5b, 5c and 5d** show the turnover of each comparison and convenience destination within and surrounding the survey year at the study base year of 2020 and the interval years.
- **Table 6** of Appendix 1 shows the existing comparison goods floorspace of each of the town and district centres within LB Lewisham as well as out-of-centre retail warehousing, and Table 6 of Appendix 2 shows the turnover of the principal foodstores in the Borough.
- **Table 7** shows the 'commitments' for new retail floorspace in the Borough which has been granted planning permission since the household survey. The commitments data has been updated as set out in Section 6.
- **Table 8 (and Table 9, for comparison goods in Appendix 1)** shows the updated forecasts of quantitative need for the Borough over the new Local Plan period to 2040. In line with the approach set out in the 2017 Study, for comparison goods the quantitative need forecasts are split between Lewisham town centre, Catford town centre, a combined need figure for the district centres, and need generated by 'other' floorspace e.g. out-of-centre retailing warehousing (see Tables 8a-8d, Appendix 1).

6.3 A summary of the revised 'baseline' need forecasts for the Borough are set out below.

Comparison goods need

6.4 Tables 8a-8e show the updated comparison goods need which LBL will need to plan for, which is summarised in Table 6.1.

Table 6.1 Comparison goods need for LBL to 2040

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Lewisham major town centre	-1,200	2,300	*7,300*	*13,300*
Catford major town centre	300	700	*1,300*	*2,100*
District centres (combined need)	-900	600	*2,600*	*4,900*
Other*	-2,900	-2,000	*-500*	*1,300*
Total	**-4,800**	**1,800**	***10,700***	***21,500***

*Source: Tables 8a-8d & Table 9, Appendix 1. *e.g. out-of-centre retail parks/non-town centre floorspace*

6.5 Table 6.1 shows that there is no requirement for any additional comparison goods floorspace in the Borough as a whole over the period to 2025, with a small positive need of 1,800 sq.m arising for the Borough by 2030. This need increases throughout the second half of the Plan period, with an indicative need for 10,700 sq.m net additional floorspace by 2035 and 21,500 sq.m net by 2040. Forecasts beyond the ten-year interval period (i.e. 2030) should be considered indicative, and regularly reviewed and updated throughout the Council's new Local Plan period.

6.6 As can be seen from Table 6.1, the majority of the identified comparison goods need arises in Lewisham town centre, which has a positive requirement of 2,300 sq.m net by 2030 and indicatively 13,300 sq.m net by 2040. This reflects the fact that Lewisham is the Borough's de-facto 'higher order' comparison goods shopping destination, with significantly the highest comparison goods turnover of any of the Borough's centres (forecast comparison goods turnover of £361.0m in 2020, compared to Catford £44.9m). Focussing the Borough's comparison goods need on delivering additional floorspace in Lewisham town centre will also support the Council's aspiration of Lewisham achieving Metropolitan Centre status.

6.7 For Catford town centre, there is a need to plan for up to 700 sq.m net additional comparison goods floorspace by 2030, and indicatively 2,100 sq.m net by 2040. For the district centres, there is a small requirement of 600 sq.m net over the first ten years of the plan period, with an indicative need of 4,900 sq.m net arising by 2040 (these are combined need figures for all of the district centres).

6.8 The need generated by other comparison goods retail floorspace in the Borough, e.g. out of centre retail parks, identifies a negative requirement over the majority of the plan period, with only a small requirement of 1,300 sq.m net arising at the end of the Plan period. This is because there is a substantial amount of 'committed' floorspace in non-town centre locations in the Borough, e.g. extant planning commitments at New Bermondsey, and Convoys Wharf and Oxestalls Road in Deptford. In line with the requirements of the NPPF this identified need should not be allocated to providing further floorspace of this nature. Instead, identified needs should be met by existing policy-defined centres and follow a sequential approach to site identification.

Convenience goods need

6.9 For convenience goods need, reflecting the approach set out in the 2017 Study, we identified needs at the Borough-wide level, in order to provide the Council with flexibility in ensuring that needs of existing and new communities are met sustainably at the local level. A summary of the convenience goods need which LBL should plan for over its new Local Plan period is shown in Table 6.2.

Table 6.2 Convenience goods need for LBL to 2040

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Borough-wide convenience goods need	6,800	7,700	*9,600*	*12,000*

Source: Table 8, Appendix 2

6.10 Table 6.2 shows that there is a need for the Council to plan for 7,700 sq.m net convenience goods floorspace by 2030, and indicatively 12,000 sq.m net by 2040. As set out in the previous section, expenditure growth in the convenience goods sector is forecast to remain low throughout the study period, however a positive requirement is identified on account of a combination of the forecast population growth and strong trading performance of existing convenience floorspace in parts of the Borough.

6.11 This is particularly apparent in the Lewisham area (where convenience goods floorspace is collectively 'over-trading' by £73.1m) as well as in Lee Green. However, the over-trading in the latter centre (driven largely by the strong performance of the in-centre Sainsbury's store) would be expected to be offset by the development of a new foodstore as part of the Leegate Centre redevelopment, should this come forward in line with the extant permission.

Comparative analysis

6.12 For both comparison and convenience goods, the amount of floorspace which the Borough should plan for has reduced relative to the 2017 Study. The reduction can be attributed to lower levels of forecast expenditure growth (in the case of comparison goods requirements), SFT accounting for a demonstrably greater 'claim' on total available spend, and Experian identifying an increased level of floorspace efficiency in existing retail floorspace.

7. Scenario testing

7.1 The need forecasts set out in Section 6 provide an updated 'baseline' set of forecasts which act as a direct update to the equivalent forecasts set out in the 2017 Study. In this section, we undertake two 'scenario tests' on these baseline forecasts, based on the following scenarios:

- Scenario A – using household survey-derived SFT forecasts in place of Experian UK average SFT forecasts.
- Scenario B – lower expenditure growth (comparison goods only)

7.2 We discuss the scenarios and the resultant floorspace requirements arising below. The accompanying data tables are provided at **Appendix 3** (for comparison goods) and **Appendix 4** (for convenience goods)

Scenario A – Household survey-derived SFT forecasts scenario

7.3 The 'baseline' scenario set out in the 2017 Study and Section 6 of this Update incorporate Experian UK average SFT figures as a 'claim' on total available convenience and comparison goods expenditure. Section 5 of this Update has shown that Experian's projections of the amount of total retail spend which is accounted for by SFT have, in the case of comparison goods, increased since the 2017 Study, and this has in part contributed to the lower baseline need forecasts identified in Section 6.

Comparison goods

7.4 The household survey undertaken in support of the 2015 Study identified that for comparison goods, rates of online shopping across the survey area are higher than the current UK average of 17.0% identified by Experian. On average, 25.0% of comparison goods shopping was undertaken online at the time of the household survey in 2015. At the zonal level, proportions of online comparison goods shopping ranged from 18.4% in zone 5 (Lee Green) to 29.8% in zone 3 (Blackheath).

7.5 Experian estimated that the total proportion of comparison goods shopping which was spent online increased by 6.3 percentage points between 2015 and 2020. On the assumption that the survey area has followed national trends, we have applied the same percentage point increase to the 2015 local online figure of 25.0%, meaning that at the 2020 study base year, online shopping accounted for 31.3% of total comparison goods spend.

7.6 At the national level, Experian forecast that comparison goods SFT will increase from 18.6% in 2020 to 20.7% in 2025 (+2.1 percentage points), 21.4% in 2030 (+1.2 percentage points from 2025), 21.7% in 2035 (+0.3 percentage points from 2030) and 21.8% in 2040 (+0.1 percentage points from 2035). On the assumption that the survey area will continue to follow national trends, we have applied the same percentage point increases to the base year SFT claim of 31.3%, meaning that by 2040, online shopping will account for 34.5% of total available comparison goods spend in the survey area. (**Table 7.1**). In other words, by the end of the Council's new Local Plan period, over one-third of spending on comparison goods will be spent through online channels.

Table 7.1 Comparison goods SFT deductions

	2020	2025	2030	2035	2040
Experian UK average comparison SFT (%)	18.6%	20.7%	21.4%	21.7%	21.8%*
Survey area average comparison SFT (%)	31.3%	33.4%	34.1%	34.4%	34.5%

*Source: Table 3, Appendix 3 (for survey area figures) / Experian RPBN (for UK averages). *Experian SFT forecast for 2038, the furthest date for which Experian projections are available*

Convenience goods

7.7 The survey results identify that the proportion of total available convenience goods expenditure which is spent online is more closely aligned to, but also above, the UK average. On average, 5.6% of convenience goods shopping across the survey area was undertaken online at the time of the 2015 household survey. The survey found that, on a zonal basis, SFT spend varies considerably, ranging from 1.6% in zone 9 (Beckenham & South Norwood) to 9.6% in zone 10 (Forest Hill).

7.8 Experian forecast that the proportion of convenience goods spend directed to SFT increased by 1.8 percentage points between 2015 and 2020, which would increase the survey-derived local SFT figure to 7.4% at the study base year of 2020. Reflecting the methodology set out for comparison goods SFT described above, and again assuming that the survey area will continue to follow national trends, the survey-derived convenience SFT figure increases to 8.7% in 2025, 9.2% in 2030, 9.5% in 2035 and 9.6% in 2040 (**Table 7.2**).

Table 7.2 Convenience goods SFT deductions

	2020	2025	2030	2035	2040
Experian UK average convenience SFT (%)	4.3%	5.0%	5.5%	5.8%	5.9%
Survey area average convenience SFT (%)	7.4%	8.7%	9.2%	9.5%	9.6%

Source: Table 3, Appendix 2 (for survey area figures) / Experian RPBN (for UK averages)

Scenario A need figures

7.9 Tables 7.3 and 7.4 shows the comparison and convenience goods floorspace need which LBL will need to plan for across the Borough under Scenario A. On a Borough-wide level there is no requirement to plan for any additional comparison goods floorspace in the first ten years of the Plan period (i.e. to 2030), but there is a positive requirement for additional floorspace arising in the second half of the plan period (2030-40) of indicatively 15,900 sq.m net by 2040.

7.10 For convenience goods, under this scenario there is a requirement to plan for additional floorspace throughout the duration of the Plan period, with a requirement for 5,800 sq.m net additional floorspace at the Borough-wide level by 2030, increasing indicatively to 9,900 sq.m net by 2040.

Table 7.3 Comparison goods need for LBL to 2040 (Scenario A)

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Lewisham major town centre	-1,800	1,100	*5,200*	*10,200*
Catford major town centre	200	600	*1,100*	*1,700*
District centres (combined need)	-1,200	100	*1,700*	*3,700*
Other*	-3,100	-2,300	*-1,100*	*400*
Total	**-5,800**	**-500**	***6,900***	***15,900***

*Source: Tables 1a-1d & Table 2, Appendix 3. *e.g. out-of-centre retail parks/non-town centre floorspace*

Table 7.4 Convenience goods need for LBL to 2038 (Scenario A)

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Borough-wide convenience goods need	**4,900**	**5,800**	***7,600***	***9,900***

Source: Table 1, Appendix 4

7.11 **Table 7.5** summarises the differences in need (at the Borough-wide level) arising under the baseline scenario and Scenario A. Given the higher claim on expenditure attributed to SFT under this scenario, the amount of new retail floorspace which the Borough needs to plan reduces under this scenario, by -2,300 sq.m net compared to the baseline at 2030 for comparison goods and -1,900 sq.m net compared to the baseline at 2030 for convenience goods.

Table 7.5 Summary of Borough-wide need to 2040 (Scenario A) and difference to baseline

	Comparison goods			Convenience goods		
	Scenario A (sq.m net)	Baseline (sq.m net)	Difference (sq.m net)	Scenario A (sq.m net)	Baseline (sq.m net)	Difference (sq.m net)
2025	-5,800	-4,800	-1,000	4,900	6,800	-1,900
2030	-500	1,800	-2,300	5,800	7,700	-1,900
*2035**	*6,900*	*10,700*	*-3,800*	*7,600*	*9,600*	*-2,000*
*2040**	*15,900*	*21,500*	*-5,600*	*9,900*	*12,000*	*-2,100*

**indicative, should be subject to further review during Local Plan period.*

Scenario B – Lower expenditure growth (comparison goods only) & Household survey-derived SFT forecasts scenario

7.12 The capacity forecasts set out in Section 6, and also under Scenario A above, use Experian's 'central case' forecasts of expenditure growth. Section 4 of this report discusses the parameters of the central case, and identifies that in the event of certain economic conditions, such as a disorderly Brexit, may lead to a reduced level of spending growth. The findings of Scenario B should therefore be considered by the Council as alternative need projections in the event of a sustained economic downturn.

7.13 Experian identify an overall (i.e combined comparison and convenience goods) 'central case' level of retail growth of 2.2% per annum between 2019 and 2037 (which we have assumed will continue until 2040). Under the lower growth scenario, this reduces to 1.6% per annum. We have applied a proportionate reduction to the comparison goods expenditure growth rates used in our baseline forecasts in order to calculate the lower comparison goods expenditure growth rate (this data is not provided by Experian). A summary of the lower comparison goods expenditure growth rates used in this scenario is shown in **Table 7.6.** We have assumed the lower levels of per capita expenditure growth will continue until 2025, after which time growth will revert to Experian's baseline projection of 3.2% per annum.

Table 7.6 Comparison goods expenditure growth under Scenario B

	2018-19	2019-20	2020-25	2025 onwards
Experian comparison goods exp growth rate (baseline/ scenario A)	+2.6%	+2.8%	+3.3% per annum	+3.2% per annum
Adjusted comparison exp growth rate	+1.9%	+2.0%	+2.4% per annum	n/a

Source: Experian Retail Planner 16 Table 1 (adjusted)

7.14 The resultant revised comparison goods need for the Borough arising under this scenario is shown in **Table 7.7.** The figures shown in Table 7.7 also incorporate the locally-derived levels of SFT identified under Scenario A. Table 7.7 shows that there would be a further reduction in the amount of comparison goods floorspace which the Borough will need to plan for, with again no requirement for new comparison goods floorspace until after 2030, and a reduced positive requirement of indicatively 14,200 sq.m net by 2040.

Table 7.7 Comparison goods need for LBL to 2040 (Scenario B) – incorporates locally-derived SFT forecasts

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Lewisham major town centre	-2,400	400	*4,400*	*9,200*
Catford major town centre	100	500	*900*	*1,500*

District centres (combined need)	-1,400	-200	*1,400*	*3,300*
Other*	-3,300	-2,500	*-1,300*	*100*
Total	**-6,900**	**-1,800**	***5,400***	***14,200***

*Source: Table 3a-3d & Table 4, Appendix 3. Note: for Scenario B we have applied a 20% reduction to the sales efficiency growth rates used in the baseline scenario and Scenario A. *e.g. out-of-centre retail parks/non-town centre floorspace*

7.15 We have not undertaken an equivalent scenario test for convenience goods, as expenditure growth in this category is already low (averaging at 0.2% per annum over the period 2018-38), and therefore any adjustments to this figure would have a marginal impact on the capacity forecasts identified under the baseline and Scenario A.

8. Conclusions

8.1 In this report, we have set out an updated assessment of the 'need' for new retail floorspace in Lewisham Borough which the Council will need to plan for over its new Local Plan period to 2040. The need figures set out in this Update supersede in full the equivalent figures set out in the London Borough of Lewisham Retail Capacity Study 2017 ('the 2017 Study').

8.2 In this Update, we have considered the policy position within which the Council will need to prepare its new Local Plan. Of particular significance is the Draft London Plan (2018), which places importance on the ability of sites within and on the edge of town centres to accommodate residential development of a variety of tenures, and also supports the intensification of low-density sites such as retail warehousing/retail parks to contribute towards meeting London's new housing needs.

8.3 The Update has been prepared to have regard to new data publications which have come forward since the 2017 Study, which combine to form an updated 'baseline' needs assessment. The data inputs which have been updated include GLA population projections, and new forecasts of expenditure growth and 'Special Forms of Trading' (i.e. online shopping) provided by Experian. The updated SFT forecasts point to online shopping accounting for a significantly larger claim on expenditure, particularly for comparison (non-food) goods. This in turn has reduced the amount of physical retail floorspace which the Council will need to plan for.

8.4 We have also undertaken a 'scenario test' which identifies the average proportion of comparison and convenience spend which was reported as being spent through online channels in the household telephone survey which was undertaken in support of the 2017 Study, and 'grown' this figure to 2040 in line with Experian guidance. The household survey found that online spend is higher across the Borough (and wider 'survey area') than the Experian averages, even allowing for the recent increase in Experian's forecasts. Online shopping is estimated to account for 29.7% of comparison goods spend in the survey area at 2018 (Experian UK average 17.0%), and 5.6% of convenience goods spend (Experian UK average 3.7%). Applying these percentage SFT claims serves to further reduce the need for new physical floorspace in the Borough.

8.5 We see no reason why the proportions of online spend identified in the survey are likely to have decreased in the interim period, or will decrease over the Plan period. On this basis, it is recommended that the need figures identified under Scenario A, which updates the revised baseline figures with locally-derived levels of online shopping, are taken forward into the Council's new Local Plan as the quantum of new comparison and convenience goods retail need which the Borough should plan for.

8.6 A summary of these forecasts is provided in Table 8.1; a breakdown of the comparison goods need figure between the principal centres in the Borough is provided at Table 7.3. Table 8.1 shows that:

- At the Borough-wide level, there is no overall requirement for new comparison goods floorspace over the period to 2030. However these figures are skewed by the fact that there is extant permission for a significant quantum of floorspace outside of the Borough's network of town and district centres, e.g. at New Bermondsey and Convoy's Wharf.
- In terms of individual centres, there are small positive requirements for new comparison goods floorspace by 2030 for Lewisham town centre (1,100 sq.m net), Catford town centre (600 sq.m net) and the district centres (100 sq.m net combined). The figure for Lewisham town centre incorporates the extant planning commitment for Phase 2 of Lewisham Gateway.
- the Council will need to plan for 5,800 sq.m net convenience goods floorspace across the Borough by 2030.

8.7 Owing to the greater uncertainties attached with longer-term forecasting, it is recommended that the Council take forward figures to 2030 into the new Local Plan. Such an approach is broadly consistent with para 85(d) of the NPPF (2019), which states that local planning authorities' planning policies should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead.

8.8 Table 8.1 identifies that over the longer term to 2040, there will be a requirement to plan for indicatively up to 15,900 sq.m net comparison goods floorspace and 9,900 sq.m net additional convenience goods floorspace. It is advised that forecasts beyond the ten-year interval period (i.e. 2030) are treated as indicative and are reviewed throughout the Council's new Local Plan period.

Table 8.1 Summary of Borough-wise comparison and convenience goods need to 2040 (Scenario A)

	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)	*2035 (indicative) (sq.m net, rounded)*	*2040 (indicative) (sq.m net, rounded)*
Borough-wide comparison goods need	**-5,800**	**-500**	***6,900***	***15,900***
Of which, Lewisham town centre	-1,800	1,100	*5,200*	*10,200*
Of which, Catford town centre	200	600	*1,100*	*1,700*
Of which, district centres (combined)	-1,200	100	*1,700*	*3,700*
*Of which, other**	-3,100	-2,300	*-1,100*	*400*
Borough-wide convenience goods need	**4,900**	**5,800**	***7,600***	***9,900***

**'Other' refers to need generated by floorspace which is not within a defined centre, e.g. retail parks.*

8.9 We have also undertaken a further 'scenario test' which identifies the quantitative needs resulting from a lower level of per capita expenditure growth in the comparison goods sector in the short to medium term, which Experian identify as a possibility in the event of certain economic conditions such as a 'disorderly' no deal Brexit. For this scenario (termed Scenario B) we have applied a lower level of per capita expenditure growth over the period to 2025, with a return to baseline per capita expenditure growth rates thereafter. These need figures are set out at paragraphs 7.12-7.15, but it is advised that they should <u>only be considered by the Council as alternative need projections in the event of a sustained economic downturn, and should only be considered up to 2030.</u>

8.10 When considering the quantitative need figures identified in this update, it should be remembered that need figures are not a 'ceiling' for development, and developers are entitled to test greater levels of floorspace against national policy tests (in instances where a site is not within a defined town centre). New development can also increase market share, in turn contributing to a greater level of need. Accordingly, it is recommended that the forecasts identified in this study are regularly refreshed throughout the Council's new Local Plan period.

8.11 The 2017 Study set out a series of strategic recommendations for the Council to inform their policy and development management approach to town centres. Whilst the terms of this instruction for this Update have not been to refresh these, at Appendix 5 we provide a 'sense check' of the continued robustness of each of the identified recommendations in light of the findings of this Update, and having regard to the revised NPPF and Draft London Plan.

Appendix 1
Comparison goods ‘baseline’ need

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
2015	74,583	108,353	61,360	61,725	55,165	28,659	90,980	96,748	90,153	46,475	**714,201**
2020	84,422	115,093	64,199	67,081	56,171	30,425	94,022	99,553	92,323	47,714	**751,002**
2025	93,559	125,615	65,598	69,165	60,869	32,756	95,440	100,264	94,332	47,598	**785,196**
2030	103,655	136,900	67,086	68,213	59,821	34,351	97,791	100,928	95,569	47,389	**811,703**
2035	111,011	149,664	68,356	70,610	60,865	35,542	100,353	102,627	98,128	47,523	**844,679**
2040	116,243	164,595	68,477	75,158	62,278	36,343	104,005	105,091	99,895	48,077	**880,163**
Change 2020-40	***31,821***	***49,502***	***4,278***	***8,078***	***6,107***	***5,918***	***9,983***	***5,538***	***7,573***	***363***	***129,161***

Source: Experian Micromarketer (October 2014) for 2015 projections; ward-based GLA population projections applied to base Experian forecasts for all remaining interval years.

Table 1a - Survey area postcode sectors

Zone	Postal Sectors
Zone 1	SE16 2/3/6/7, SE8 3/4/5
Zone 2	SE15 1/2/3/4/5/6, SE4 2/5/6
Zone 3	SE4 1, SE13 5/6/7
Zone 4	SE10 8/9, SE3 0/7/8/9, SE12 8
Zone 5	SE6 1, BR1 5, SE12 0/9
Zone 6	BR1 1/3/4
Zone 7	SE23 1/2, SE6 2/3/4, SE26 4/5/6
Zone 8	CR7 8, SE19 1/3, SW16 3, SE27 0/8/9, SW2 3
Zone 9	SE25 4/6, SE19 2, SE20 7/8, BR3 1/4/5
Zone 10	SE21 7, SE22 0/8/9, SE23 3

Source: Lewisham Household Survey, November 2015

Table 2 - Survey area per capita expenditure forecasts, comparison goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2020	3,321	3,294	4,877	4,046	3,798	4,339	3,793	3,960	3,930	4,887
2020 Minus SFT at 18.6%	**2,703**	**2,681**	**3,970**	**3,293**	**3,092**	**3,532**	**3,088**	**3,224**	**3,199**	**3,978**
2025	3,906	3,875	5,737	4,759	4,468	5,104	4,462	4,658	4,623	5,749
2025 Minus SFT at 20.7%	**3,098**	**3,073**	**4,549**	**3,774**	**3,543**	**4,047**	**3,538**	**3,694**	**3,666**	**4,559**
2030	4,573	4,536	6,716	5,571	5,230	5,975	5,223	5,453	5,411	6,729
2030 Minus SFT at 21.4%	**3,594**	**3,565**	**5,278**	**4,379**	**4,111**	**4,696**	**4,105**	**4,286**	**4,253**	**5,289**
2035	5,353	5,309	7,861	6,521	6,122	6,994	6,113	6,383	6,335	7,877
2035 Minus SFT at 21.7%	**4,191**	**4,157**	**6,155**	**5,106**	**4,794**	**5,476**	**4,787**	**4,998**	**4,960**	**6,168**
2040	6,266	6,215	9,202	7,633	7,166	8,187	7,156	7,472	7,415	9,220
2040 Minus SFT at 21.8%	**4,900**	**4,860**	**7,196**	**5,969**	**5,604**	**6,402**	**5,596**	**5,843**	**5,799**	**7,210**

Expenditure growth rates: 2018-19: 2.6%, 2019-20: 2.8%, 2020-25: 3.3% per annum, 2026 onwards: 3.2% per annum. 2013 prices.

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 16 (December 2018).

Table 3 - Survey retail expenditure, comparison goods

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)
2020	228.2	308.6	254.9	220.9	173.7	107.5	290.3	320.9	295.4	189.8	**2,390.2**
2025	289.8	386.0	298.4	261.0	215.7	132.6	337.7	370.4	345.8	217.0	**2,854.4**
2030	372.6	488.1	354.1	298.7	245.9	161.3	401.4	432.6	406.5	250.6	**3,411.8**
2035	465.3	622.2	420.7	360.5	291.8	194.6	480.4	512.9	486.7	293.1	**4,128.3**
2040	569.6	800.0	492.8	448.6	349.0	232.7	582.0	614.1	579.2	346.7	**5,014.6**
Change 2020-40	***341.4***	***491.3***	***237.9***	***227.7***	***175.3***	***125.2***	***291.7***	***293.1***	***283.9***	***156.8***	***2,624.4***

Source: Tables 1 & 2. 2013 prices.

Table 4 - Comparison goods % market share allocation (2015)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)
Compar son goods f oorspace n Lew sham										
Major town centres										
Lewisham town centre (zone 4)	13.45%	27.67%	21.07%	47.11%	12.03%	1.43%	16.99%	0.31%	0.18%	7.28%
Catford town centre (zone 7)	0.51%	0.69%	0.03%	2.41%	5.70%	2.76%	7.51%	0.00%	0.40%	0.20%
Sub-total, major town centres	**13.96%**	**28.36%**	**21.11%**	**49.53%**	**17.73%**	**4.18%**	**24.50%**	**0.31%**	**0.58%**	**7.48%**
District centres										
Deptford (zone 1)	2.34%	1.01%	0.79%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%
New Cross (zone 2)	0.18%	5.26%	0.00%	1.61%	0.08%	0.00%	0.00%	0.00%	0.00%	0.00%
Blackheath (zone 3)	0.06%	0.27%	1.59%	0.19%	1.03%	0.00%	0.00%	0.00%	0.00%	0.00%
Lee Green (zone 5)	0.09%	0.00%	5.11%	0.88%	3.57%	0.15%	0.00%	0.00%	0.13%	0.00%
of which, Lee Green District Centre	*0.00%*	*0.00%*	*2.22%*	*0.77%*	*3.34%*	*0.15%*	*0.00%*	*0.00%*	*0.13%*	*0.00%*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.09%*	*0.00%*	*2.89%*	*0.12%*	*0.23%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*
Downham (zone 6)	0.00%	0.00%	0.03%	0.00%	0.35%	1.36%	0.00%	0.00%	0.00%	0.00%
Sydenham (zone 7)	0.00%	0.22%	0.00%	0.21%	0.02%	0.49%	11.38%	0.44%	0.55%	1.32%
Forest Hill (zone 10)	0.00%	0.11%	0.00%	0.00%	0.00%	0.00%	5.88%	0.14%	0.00%	7.41%
Sub-total, district centres	**2.67%**	**6.86%**	**7.52%**	**2.89%**	**5.05%**	**2.00%**	**17.26%**	**0.59%**	**0.67%**	**8.95%**
Out-of-centre retail floorspace in Catford										
Bromley Road retail warehousing (zone 7)	0.08%	1.13%	1.12%	6.57%	8.18%	6.14%	4.83%	0.20%	1.07%	2.75%
Homebase, Beckenham Hill Road, Catford (zone 7)	0.11%	0.00%	0.00%	0.62%	0.32%	0.70%	0.06%	0.00%	0.02%	0.00%
Wickes, Catford Hill, Catford (zone 7)	0.02%	0.00%	0.00%	0.00%	0.15%	0.19%	0.14%	0.03%	0.02%	0.00%
Sub-total, Catford out-of-centre	***0.22%***	***1.13%***	***1.12%***	***7.19%***	***8.65%***	***7.04%***	***5.02%***	***0.23%***	***1.11%***	***2.75%***
Other out-of-centre retail floorspace										
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.00%	0.07%	0.00%	0.56%	1.05%	0.63%	10.35%	0.38%	1.85%	3.50%
Sub-total, out-of-centre retail floorspace	**0.22%**	**1.20%**	**1.12%**	**7.76%**	**9.70%**	**7.67%**	**15.37%**	**0.61%**	**2.96%**	**6.25%**
Sub-total, comparison goods floorspace in Lewisham (A)	**16.85%**	**36.43%**	**29.75%**	**60.18%**	**32.49%**	**13.85%**	**57.13%**	**1.50%**	**4.21%**	**22.67%**
Compar son goods f oorspace outs de Lew sham (w th n survey area)										
Surrey Quays / Canada Water (zone 1)	30.33%	4.15%	0.00%	3.35%	0.00%	0.00%	0.00%	0.00%	0.00%	1.18%
Peckham (zone 2)	1.93%	13.05%	0.00%	0.17%	0.00%	0.00%	0.00%	0.41%	0.13%	6.35%
Greenwich (zone 3)	3.88%	0.64%	9.65%	2.33%	1.29%	0.25%	0.64%	0.38%	0.89%	0.20%
Bromley (zone 6)	0.90%	3.08%	2.53%	4.04%	25.91%	66.40%	19.00%	3.52%	23.47%	9.18%
Penge (zone 9)	0.13%	0.10%	0.00%	0.00%	0.00%	0.13%	1.98%	0.89%	9.72%	1.03%
Beckenham (zone 9)	0.00%	0.05%	0.47%	0.08%	0.42%	0.15%	0.31%	1.18%	8.34%	0.15%
East Dulwich (zone 10)	0.00%	1.36%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%	0.00%	10.85%
Sub-total, other comparison goods floorspace in survey area (B)	**37.17%**	**22.44%**	**12.64%**	**9.97%**	**27.62%**	**66.92%**	**21.94%**	**7.16%**	**42.55%**	**28.93%**
Compar son goods f oorspace outs de Lew sham (outs de survey area)										
Central London (incl West End, City, Covent Garden, Shoreditch)	14.74%	14.07%	12.86%	11.77%	4.20%	7.24%	7.64%	22.93%	6.71%	22.09%
Croydon	0.99%	4.33%	0.50%	0.81%	0.40%	1.50%	6.32%	23.92%	33.99%	10.75%
of which, town centre	*0.00%*	*2.22%*	*0.15%*	*0.25%*	*0.05%*	*0.46%*	*3.63%*	*17.97%*	*21.73%*	*9.17%*
of which, Purley Way retail warehousing	*0.99%*	*2.11%*	*0.35%*	*0.56%*	*0.34%*	*1.04%*	*2.69%*	*5.94%*	*12.26%*	*1.58%*
Bluewater	1.48%	1.79%	19.63%	5.11%	7.82%	4.52%	1.73%	0.43%	1.94%	3.78%
Charlton retail warehousing	1.16%	0.63%	9.05%	0.41%	5.68%	0.00%	0.00%	0.29%	0.00%	0.00%
Old Kent Road retail warehousing	16.25%	16.80%	0.10%	0.54%	0.00%	0.00%	0.10%	0.19%	0.00%	2.18%
Brixton	0.00%	0.00%	0.00%	0.00%	0.00%	1.48%	0.00%	9.91%	0.00%	1.62%
Streatham	0.00%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%	9.65%	0.00%	0.00%
Eltham	0.05%	0.00%	2.38%	0.36%	6.70%	0.00%	0.00%	0.00%	0.00%	0.74%
Stratford (Including Westfield Stratford City)	5.00%	0.00%	1.61%	0.59%	0.22%	0.00%	0.29%	0.00%	0.00%	0.27%
All other locations outside survey area	6.30%	3.16%	9.06%	8.38%	13.35%	4.48%	2.65%	10.18%	3.98%	5.61%
Sub-total, comparison goods floorspace outside survey area (C)	**45.98%**	**40.78%**	**55.19%**	**27.96%**	**38.51%**	**19.23%**	**18.72%**	**77.51%**	**46.61%**	**47.03%**
Local / other shops in survey area (D)	**0.00%**	**0.36%**	**2.42%**	**1.89%**	**1.39%**	**0.00%**	**2.21%**	**13.83%**	**6.62%**	**1.36%**
Overall total (A+B+C+D)	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research Telephone Survey, November 2015

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 5a - Comparison goods spend (£m) 2020

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2020	**228.2**	**308.6**	**254.9**	**220.9**	**173.7**	**107.5**	**290.3**	**320.9**	**295.4**	**189.8**	**2,390.2**	***100.0***
Compar son goods f oorspace n Lew sham												
Major town centres												
Lewisham town centre (zone 4)	30.7	85.4	53.7	104.1	20.9	1.5	49.3	1.0	0.5	13.8	361.0	15.1
Catford town centre (zone 7)	1.2	2.1	0.1	5.3	9.9	3.0	21.8	0.0	1.2	0.4	44.9	1.9
Sub-total, major town centres	**31.9**	**87.5**	**53.8**	**109.4**	**30.8**	**4.5**	**71.1**	**1.0**	**1.7**	**14.2**	**405.9**	**17.0**
District centres												
Deptford (zone 1)	5.3	3.1	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	10.9	0.5
New Cross (zone 2)	0.4	16.2	0.0	3.6	0.1	0.0	0.0	0.0	0.0	0.0	20.3	0.9
Blackheath (zone 3)	0.1	0.8	4.1	0.4	1.8	0.0	0.0	0.0	0.0	0.0	7.2	0.3
Lee Green (zone 5)	0.2	0.0	13.0	2.0	6.2	0.2	0.0	0.0	0.4	0.0	21.9	0.9
of which, Lee Green District Centre	*0.0*	*0.0*	*5.7*	*1.7*	*5.8*	*0.2*	*0.0*	*0.0*	*0.4*	*0.0*	*13.7*	*0.6*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.2*	*0.0*	*7.4*	*0.3*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*8.2*	*0.3*
Downham (zone 6)	0.0	0.0	0.1	0.0	0.6	1.5	0.0	0.0	0.0	0.0	2.1	0.1
Sydenham (zone 7)	0.0	0.7	0.0	0.5	0.0	0.5	33.0	1.4	1.6	2.5	40.3	1.7
Forest Hill (zone 10)	0.0	0.3	0.0	0.0	0.0	0.0	17.1	0.5	0.0	14.1	31.9	1.3
Sub-total, district centres	**6.1**	**21.2**	**19.2**	**6.4**	**8.8**	**2.1**	**50.1**	**1.9**	**2.0**	**17.0**	**134.7**	**5.6**
Out-of-centre retail floorspace in Catford												
Bromley Road retail warehousing (zone 7)	0.2	3.5	2.9	14.5	14.2	6.6	14.0	0.6	3.2	5.2	64.9	2.7
Homebase, Beckenham Hill Road, Catford (zone 7)	0.3	0.0	0.0	1.4	0.6	0.8	0.2	0.0	0.1	0.0	3.2	0.1
Wickes, Catford Hill, Catford (zone 7)	0.1	0.0	0.0	0.0	0.3	0.2	0.4	0.1	0.1	0.0	1.1	0.0
Sub-total, Catford out-of-centre	**0.5**	**3.5**	**2.9**	**15.9**	**15.0**	**7.6**	**14.6**	**0.7**	**3.3**	**5.2**	**69.2**	**2.9**
Other out-of-centre retail floorspace												
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.0	0.2	0.0	1.2	1.8	0.7	30.1	1.2	5.5	6.6	47.3	2.0
Sub-total, out-of-centre retail floorspace	**0.0**	**0.2**	**0.0**	**1.2**	**1.8**	**0.7**	**30.1**	**1.2**	**5.5**	**6.6**	**47.3**	**2.0**
Sub-total, comparison goods floorspace in Lewisham (A)	**38.4**	**112.4**	**75.8**	**132.9**	**56.4**	**14.9**	**165.8**	**4.8**	**12.4**	**43.0**	**657.1**	**27.5**
Compar son goods f oorspace outside Lew sham (within survey area)												
Surrey Quays / Canada Water (zone 1)	69.2	12.8	0.0	7.4	0.0	0.0	0.0	0.0	0.0	2.2	91.7	3.8
Peckham (zone 2)	4.4	40.3	0.0	0.4	0.0	0.0	0.0	1.3	0.4	12.1	58.8	2.5
Greenwich (zone 3)	8.9	2.0	24.6	5.1	2.2	0.3	1.9	1.2	2.6	0.4	49.1	2.1
Bromley (zone 6)	2.1	9.5	6.4	8.9	45.0	71.4	55.2	11.3	69.3	17.4	296.5	12.4
Penge (zone 9)	0.3	0.3	0.0	0.0	0.0	0.1	5.8	2.9	28.7	2.0	40.0	1.7
Beckenham (zone 9)	0.0	0.2	1.2	0.2	0.7	0.2	0.9	3.8	24.6	0.3	32.0	1.3
East Dulwich (zone 10)	0.0	4.2	0.0	0.0	0.0	0.0	0.0	2.5	0.0	20.6	27.3	1.1
Sub-total, other comparison goods floorspace in survey area (B)	**84.8**	**69.2**	**32.2**	**22.0**	**48.0**	**71.9**	**63.7**	**23.0**	**125.7**	**54.9**	**595.4**	**24.9**
Compar son goods f oorspace outside Lew sham (outs de survey area)												
Central London (incl West End, City, Covent Garden, Shoreditch)	33.6	43.4	32.8	26.0	7.3	7.8	22.2	73.6	19.8	41.9	308.4	12.9
Croydon	2.3	13.4	1.3	1.8	0.7	1.6	18.4	76.8	100.4	20.4	236.9	9.9
of which, town centre	*0.0*	*6.8*	*0.4*	*0.5*	*0.1*	*0.5*	*10.5*	*57.7*	*64.2*	*17.4*	*158.2*	*6.6*
of which, Purley Way retail warehousing	*2.3*	*6.5*	*0.9*	*1.2*	*0.6*	*1.1*	*7.8*	*19.1*	*36.2*	*3.0*	*78.7*	*3.3*
Bluewater	3.4	5.5	50.0	11.3	13.6	4.9	5.0	1.4	5.7	7.2	108.0	4.5
Charlton retail warehousing	2.7	1.9	23.1	0.9	9.9	0.0	0.0	0.9	0.0	0.0	39.4	1.6
Old Kent Road retail warehousing	37.1	51.9	0.3	1.2	0.0	0.0	0.3	0.6	0.0	4.1	95.5	4.0
Brixton	0.0	0.0	0.0	0.0	0.0	1.6	0.0	31.8	0.0	3.1	36.5	1.5
Streatham	0.0	0.0	0.0	0.0	0.2	0.0	0.0	31.0	0.0	0.0	31.2	1.3
Eltham	0.1	0.0	6.1	0.8	11.6	0.0	0.0	0.0	0.0	1.4	20.0	0.8
Stratford (Including Westfield Stratford City)	11.4	0.0	4.1	1.3	0.4	0.0	0.8	0.0	0.0	0.5	18.5	0.8
All other locations outside survey area	14.4	9.7	23.1	18.5	23.2	4.8	7.7	32.7	11.7	10.7	156.5	6.5
Sub-total, comparison goods floorspace outside survey area (C)	**104.9**	**125.9**	**140.7**	**61.8**	**66.9**	**20.7**	**54.4**	**248.7**	**137.7**	**89.3**	**1,050.8**	**44.0**
Local / other shops in survey area (D)	0.0	1.1	6.2	4.2	2.4	0.0	6.4	44.4	19.6	2.6	86.8	3.6
Overall total (A+B+C+D)	**228.2**	**308.6**	**254.9**	**220.9**	**173.7**	**107.5**	**290.3**	**320.9**	**295.4**	**189.8**	**2,390.2**	**100.0**

Source: Table 3, Table 4. 2013 prices.

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 5b - Comparison goods spend (£m) 2025

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2025	**289.8**	**386.0**	**298.4**	**261.0**	**215.7**	**132.6**	**337.7**	**370.4**	**345.8**	**217.0**	**2,854.4**	***100.0***
Compar son goods f oorspace n Lew sham												
Major town centres												
Lewisham town centre (zone 4)	39.0	106.8	62.9	123.0	25.9	1.9	57.4	1.2	0.6	15.8	434.4	15.2
Catford town centre (zone 7)	1.5	2.7	0.1	6.3	12.3	3.7	25.4	0.0	1.4	0.4	53.6	1.9
Sub-total, major town centres	**40.5**	**109.5**	**63.0**	**129.3**	**38.2**	**5.5**	**82.7**	**1.2**	**2.0**	**16.2**	**488.1**	**17.1**
District centres												
Deptford (zone 1)	6.8	3.9	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	13.6	0.5
New Cross (zone 2)	0.5	20.3	0.0	4.2	0.2	0.0	0.0	0.0	0.0	0.0	25.2	0.9
Blackheath (zone 3)	0.2	1.0	4.7	0.5	2.2	0.0	0.0	0.0	0.0	0.0	8.7	0.3
Lee Green (zone 5)	0.3	0.0	15.2	2.3	7.7	0.2	0.0	0.0	0.4	0.0	26.1	0.9
of which, Lee Green District Centre	*0.0*	*0.0*	*6.6*	*2.0*	*7.2*	*0.2*	*0.0*	*0.0*	*0.4*	*0.0*	*16.4*	*0.6*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.3*	*0.0*	*8.6*	*0.3*	*0.5*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*9.7*	*0.3*
Downham (zone 6)	0.0	0.0	0.1	0.0	0.7	1.8	0.0	0.0	0.0	0.0	2.6	0.1
Sydenham (zone 7)	0.0	0.8	0.0	0.5	0.0	0.6	38.4	1.6	1.9	2.9	46.9	1.6
Forest Hill (zone 10)	0.0	0.4	0.0	0.0	0.0	0.0	19.9	0.5	0.0	16.1	36.9	1.3
Sub-total, district centres	**7.7**	**26.5**	**22.4**	**7.6**	**10.9**	**2.6**	**58.3**	**2.2**	**2.3**	**19.4**	**159.9**	**5.6**
Out-of-centre retail floorspace in Catford												
Bromley Road retail warehousing (zone 7)	0.2	4.4	3.4	17.2	17.6	8.1	16.3	0.7	3.7	6.0	77.6	2.7
Homebase, Beckenham Hill Road, Catford (zone 7)	0.3	0.0	0.0	1.6	0.7	0.9	0.2	0.0	0.1	0.0	3.9	0.1
Wickes, Catford Hill, Catford (zone 7)	0.1	0.0	0.0	0.0	0.3	0.2	0.5	0.1	0.1	0.0	1.3	0.0
Sub-total, Catford out-of-centre	**0.6**	**4.4**	**3.4**	**18.8**	**18.7**	**9.3**	**17.0**	**0.8**	**3.8**	**6.0**	**82.7**	**2.9**
Other out-of-centre retail floorspace												
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.0	0.3	0.0	1.5	2.3	0.8	35.0	1.4	6.4	7.6	55.2	1.9
Sub-total, out-of-centre retail floorspace	**0.0**	**0.3**	**0.0**	**1.5**	**2.3**	**0.8**	**35.0**	**1.4**	**6.4**	**7.6**	**55.2**	**1.9**
Sub-total, comparison goods floorspace in Lewisham (A)	**48.8**	**140.6**	**88.8**	**157.1**	**70.1**	**18.4**	**192.9**	**5.6**	**14.6**	**49.2**	**785.9**	**27.5**
Compar son goods f oorspace outside Lew sham (within survey area)												
Surrey Quays / Canada Water (zone 1)	87.9	16.0	0.0	8.8	0.0	0.0	0.0	0.0	0.0	2.6	115.2	4.0
Peckham (zone 2)	5.6	50.4	0.0	0.4	0.0	0.0	0.0	1.5	0.5	13.8	72.2	2.5
Greenwich (zone 3)	11.3	2.5	28.8	6.1	2.8	0.3	2.2	1.4	3.1	0.4	58.8	2.1
Bromley (zone 6)	2.6	11.9	7.5	10.5	55.9	88.0	64.2	13.0	81.2	19.9	354.8	12.4
Penge (zone 9)	0.4	0.4	0.0	0.0	0.0	0.2	6.7	3.3	33.6	2.2	46.7	1.6
Beckenham (zone 9)	0.0	0.2	1.4	0.2	0.9	0.2	1.1	4.4	28.9	0.3	37.5	1.3
East Dulwich (zone 10)	0.0	5.3	0.0	0.0	0.0	0.0	0.0	2.9	0.0	23.5	31.7	1.1
Sub-total, other comparison goods floorspace in survey area (B)	**107.7**	**86.6**	**37.7**	**26.0**	**59.6**	**88.7**	**74.1**	**26.5**	**147.2**	**62.8**	**716.9**	**25.1**
Compar son goods f oorspace outside Lew sham (outs de survey area)												
Central London (incl West End, City, Covent Garden, Shoreditch)	42.7	54.3	38.4	30.7	9.1	9.6	25.8	84.9	23.2	47.9	366.6	12.8
Croydon	2.9	16.7	1.5	2.1	0.9	2.0	21.4	88.6	117.6	23.3	276.8	9.7
of which, town centre	*0.0*	*8.6*	*0.5*	*0.6*	*0.1*	*0.6*	*12.3*	*66.6*	*75.2*	*19.9*	*184.3*	*6.5*
of which, Purley Way retail warehousing	*2.9*	*8.2*	*1.0*	*1.5*	*0.7*	*1.4*	*9.1*	*22.0*	*42.4*	*3.4*	*92.6*	*3.2*
Bluewater	4.3	6.9	58.6	13.3	16.9	6.0	5.8	1.6	6.7	8.2	128.3	4.5
Charlton retail warehousing	3.4	2.4	27.0	1.1	12.3	0.0	0.0	1.1	0.0	0.0	47.2	1.7
Old Kent Road retail warehousing	47.1	64.9	0.3	1.4	0.0	0.0	0.3	0.7	0.0	4.7	119.5	4.2
Brixton	0.0	0.0	0.0	0.0	0.0	2.0	0.0	36.7	0.0	3.5	42.2	1.5
Streatham	0.0	0.0	0.0	0.0	0.3	0.0	0.0	35.7	0.0	0.0	36.0	1.3
Eltham	0.2	0.0	7.1	0.9	14.4	0.0	0.0	0.0	0.0	1.6	24.2	0.8
Stratford (Including Westfield Stratford City)	14.5	0.0	4.8	1.5	0.5	0.0	1.0	0.0	0.0	0.6	22.8	0.8
All other locations outside survey area	18.3	12.2	27.0	21.9	28.8	5.9	8.9	37.7	13.8	12.2	186.7	6.5
Sub-total, comparison goods floorspace outside survey area (C)	**133.3**	**157.4**	**164.7**	**73.0**	**83.0**	**25.5**	**63.2**	**287.1**	**161.2**	**102.0**	**1,250.5**	**43.8**
Local / other shops in survey area (D)	0.0	1.4	7.2	4.9	3.0	0.0	7.5	51.2	22.9	3.0	101.1	3.5
Overall total (A+B+C+D)	**289.8**	**386.0**	**298.4**	**261.0**	**215.7**	**132.6**	**337.7**	**370.4**	**345.8**	**217.0**	**2,854.4**	**100.0**

Source: Table 3, Table 4. 2013 prices.

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 5c - Comparison goods spend (£m) 2030

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2030	**372.6**	**488.1**	**354.1**	**298.7**	**245.9**	**161.3**	**401.4**	**432.6**	**406.5**	**250.6**	**3,411.8**	***100.0***
Compar son goods f oorspace n Lew sham												
Major town centres												
Lewisham town centre (zone 4)	50.1	135.0	74.6	140.7	29.6	2.3	68.2	1.3	0.7	18.2	520.9	15.3
Catford town centre (zone 7)	1.9	3.4	0.1	7.2	14.0	4.4	30.2	0.0	1.6	0.5	63.3	1.9
Sub-total, major town centres	**52.0**	**138.4**	**74.7**	**147.9**	**43.6**	**6.8**	**98.3**	**1.3**	**2.4**	**18.7**	**584.2**	**17.1**
District centres												
Deptford (zone 1)	8.7	4.9	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.6	17.0	0.5
New Cross (zone 2)	0.7	25.7	0.0	4.8	0.2	0.0	0.0	0.0	0.0	0.0	31.4	0.9
Blackheath (zone 3)	0.2	1.3	5.6	0.6	2.5	0.0	0.0	0.0	0.0	0.0	10.2	0.3
Lee Green (zone 5)	0.3	0.0	18.1	2.6	8.8	0.2	0.0	0.0	0.5	0.0	30.6	0.9
of which, Lee Green District Centre	*0.0*	*0.0*	*7.9*	*2.3*	*8.2*	*0.2*	*0.0*	*0.0*	*0.5*	*0.0*	*19.1*	*0.6*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.3*	*0.0*	*10.2*	*0.4*	*0.6*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*11.5*	*0.3*
Downham (zone 6)	0.0	0.0	0.1	0.0	0.8	2.2	0.0	0.0	0.0	0.0	3.1	0.1
Sydenham (zone 7)	0.0	1.1	0.0	0.6	0.1	0.8	45.7	1.9	2.2	3.3	55.6	1.6
Forest Hill (zone 10)	0.0	0.5	0.0	0.0	0.0	0.0	23.6	0.6	0.0	18.6	43.3	1.3
Sub-total, district centres	**9.9**	**33.5**	**26.6**	**8.6**	**12.4**	**3.2**	**69.3**	**2.5**	**2.7**	**22.4**	**191.3**	**5.6**
Out-of-centre retail floorspace in Catford												
Bromley Road retail warehousing (zone 7)	0.3	5.5	4.0	19.6	20.1	9.9	19.4	0.9	4.3	6.9	91.0	2.7
Homebase, Beckenham Hill Road, Catford (zone 7)	0.4	0.0	0.0	1.9	0.8	1.1	0.2	0.0	0.1	0.0	4.5	0.1
Wickes, Catford Hill, Catford (zone 7)	0.1	0.0	0.0	0.0	0.4	0.3	0.5	0.1	0.1	0.0	1.5	0.0
Sub-total, Catford out-of-centre	**0.8**	**5.5**	**4.0**	**21.5**	**21.3**	**11.3**	**20.2**	**1.0**	**4.5**	**6.9**	**97.0**	**2.8**
Other out-of-centre retail floorspace												
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.0	0.3	0.0	1.7	2.6	1.0	41.6	1.6	7.5	8.8	65.1	1.9
Sub-total, out-of-centre retail floorspace	**0.0**	**0.3**	**0.0**	**1.7**	**2.6**	**1.0**	**41.6**	**1.6**	**7.5**	**8.8**	**65.1**	**1.9**
Sub-total, comparison goods floorspace in Lewisham (A)	**62.8**	**177.8**	**105.3**	**179.7**	**79.9**	**22.3**	**229.3**	**6.5**	**17.1**	**56.8**	**937.6**	**27.5**
Compar son goods f oorspace outside Lew sham (within survey area)												
Surrey Quays / Canada Water (zone 1)	113.0	20.3	0.0	10.0	0.0	0.0	0.0	0.0	0.0	3.0	146.2	4.3
Peckham (zone 2)	7.2	63.7	0.0	0.5	0.0	0.0	0.0	1.8	0.5	15.9	89.6	2.6
Greenwich (zone 3)	14.5	3.1	34.2	6.9	3.2	0.4	2.6	1.6	3.6	0.5	70.6	2.1
Bromley (zone 6)	3.4	15.0	8.9	12.1	63.7	107.1	76.3	15.2	95.4	23.0	420.1	12.3
Penge (zone 9)	0.5	0.5	0.0	0.0	0.0	0.2	8.0	3.9	39.5	2.6	55.0	1.6
Beckenham (zone 9)	0.0	0.2	1.7	0.2	1.0	0.2	1.3	5.1	33.9	0.4	44.1	1.3
East Dulwich (zone 10)	0.0	6.7	0.0	0.0	0.0	0.0	0.0	3.4	0.0	27.2	37.2	1.1
Sub-total, other comparison goods floorspace in survey area (B)	**138.5**	**109.5**	**44.8**	**29.8**	**67.9**	**108.0**	**88.1**	**31.0**	**173.0**	**72.5**	**862.9**	**25.3**
Compar son goods f oorspace outside Lew sham (outs de survey area)												
Central London (incl West End, City, Covent Garden, Shoreditch)	54.9	68.7	45.5	35.2	10.3	11.7	30.7	99.2	27.3	55.4	438.8	12.9
Croydon	3.7	21.1	1.8	2.4	1.0	2.4	25.4	103.5	138.2	26.9	326.4	9.6
of which, town centre	*0.0*	*10.8*	*0.5*	*0.7*	*0.1*	*0.7*	*14.6*	*77.7*	*88.4*	*23.0*	*216.6*	*6.3*
of which, Purley Way retail warehousing	*3.7*	*10.3*	*1.2*	*1.7*	*0.8*	*1.7*	*10.8*	*25.7*	*49.8*	*3.9*	*109.7*	*3.2*
Bluewater	5.5	8.7	69.5	15.3	19.2	7.3	6.9	1.9	7.9	9.5	151.7	4.4
Charlton retail warehousing	4.3	3.1	32.0	1.2	14.0	0.0	0.0	1.3	0.0	0.0	55.9	1.6
Old Kent Road retail warehousing	60.5	82.0	0.4	1.6	0.0	0.0	0.4	0.8	0.0	5.5	151.3	4.4
Brixton	0.0	0.0	0.0	0.0	0.0	2.4	0.0	42.9	0.0	4.1	49.3	1.4
Streatham	0.0	0.0	0.0	0.0	0.3	0.0	0.0	41.7	0.0	0.0	42.1	1.2
Eltham	0.2	0.0	8.4	1.1	16.5	0.0	0.0	0.0	0.0	1.9	28.0	0.8
Stratford (Including Westfield Stratford City)	18.6	0.0	5.7	1.8	0.6	0.0	1.2	0.0	0.0	0.7	28.4	0.8
All other locations outside survey area	23.5	15.4	32.1	25.0	32.8	7.2	10.6	44.0	16.2	14.1	221.0	6.5
Sub-total, comparison goods floorspace outside survey area (C)	**171.3**	**199.0**	**195.4**	**83.5**	**94.7**	**31.0**	**75.2**	**335.3**	**189.5**	**117.9**	**1,492.8**	**43.8**
Local / other shops in survey area (D)	0.0	1.7	8.6	5.6	3.4	0.0	8.9	59.8	26.9	3.4	118.4	3.5
Overall total (A+B+C+D)	**372.6**	**488.1**	**354.1**	**298.7**	**245.9**	**161.3**	**401.4**	**432.6**	**406.5**	**250.6**	**3,411.8**	**100.0**

Source: Table 3, Table 4. 2013 prices.

Table 5d - Comparison goods spend (£m) 2035

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2035	**465.3**	**622.2**	**420.7**	**360.5**	**291.8**	**194.6**	**480.4**	**512.9**	**486.7**	**293.1**	**4,128.3**	***100.0***
Compar son goods f oorspace n Lew sham												
Major town centres												
Lewisham town centre (zone 4)	62.6	172.2	88.7	169.9	35.1	2.8	81.6	1.6	0.9	21.3	636.6	15.4
Catford town centre (zone 7)	2.3	4.3	0.1	8.7	16.6	5.4	36.1	0.0	1.9	0.6	76.1	1.8
Sub-total, major town centres	**64.9**	**176.5**	**88.8**	**178.6**	**51.7**	**8.1**	**117.7**	**1.6**	**2.8**	**21.9**	**712.7**	**17.3**
District centres												
Deptford (zone 1)	10.9	6.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.7	21.2	0.5
New Cross (zone 2)	0.8	32.7	0.0	5.8	0.2	0.0	0.0	0.0	0.0	0.0	39.6	1.0
Blackheath (zone 3)	0.3	1.7	6.7	0.7	3.0	0.0	0.0	0.0	0.0	0.0	12.3	0.3
Lee Green (zone 5)	0.4	0.0	21.5	3.2	10.4	0.3	0.0	0.0	0.6	0.0	36.4	0.9
of which, Lee Green District Centre	*0.0*	*0.0*	*9.3*	*2.8*	*9.7*	*0.3*	*0.0*	*0.0*	*0.6*	*0.0*	*22.7*	*0.6*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.4*	*0.0*	*12.2*	*0.4*	*0.7*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*13.7*	*0.3*
Downham (zone 6)	0.0	0.0	0.1	0.0	1.0	2.7	0.0	0.0	0.0	0.0	3.8	0.1
Sydenham (zone 7)	0.0	1.4	0.0	0.8	0.1	0.9	54.7	2.3	2.7	3.9	66.6	1.6
Forest Hill (zone 10)	0.0	0.7	0.0	0.0	0.0	0.0	28.2	0.7	0.0	21.7	51.3	1.2
Sub-total, district centres	**12.4**	**42.7**	**31.6**	**10.4**	**14.7**	**3.9**	**82.9**	**3.0**	**3.3**	**26.2**	**231.2**	**5.6**
Out-of-centre retail floorspace in Catford												
Bromley Road retail warehousing (zone 7)	0.4	7.1	4.7	23.7	23.9	12.0	23.2	1.0	5.2	8.1	109.2	2.6
Homebase, Beckenham Hill Road, Catford (zone 7)	0.5	0.0	0.0	2.2	0.9	1.4	0.3	0.0	0.1	0.0	5.5	0.1
Wickes, Catford Hill, Catford (zone 7)	0.1	0.0	0.0	0.0	0.4	0.4	0.7	0.1	0.1	0.0	1.8	0.0
Sub-total, Catford out-of-centre	**1.0**	**7.1**	**4.7**	**25.9**	**25.2**	**13.7**	**24.1**	**1.2**	**5.4**	**8.1**	**116.4**	**2.8**
Other out-of-centre retail floorspace												
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.0	0.4	0.0	2.0	3.1	1.2	49.7	2.0	9.0	10.2	77.7	1.9
Sub-total, out-of-centre retail floorspace	**0.0**	**0.4**	**0.0**	**2.0**	**3.1**	**1.2**	**49.7**	**2.0**	**9.0**	**10.2**	**77.7**	**1.9**
Sub-total, comparison goods floorspace in Lewisham (A)	**78.4**	**226.6**	**125.2**	**217.0**	**94.8**	**27.0**	**274.4**	**7.7**	**20.5**	**66.5**	**1,138.0**	**27.6**
Compar son goods f oorspace outside Lew sham (within survey area)												
Surrey Quays / Canada Water (zone 1)	141.1	25.8	0.0	12.1	0.0	0.0	0.0	0.0	0.0	3.5	182.5	4.4
Peckham (zone 2)	9.0	81.2	0.0	0.6	0.0	0.0	0.0	2.1	0.7	18.6	112.1	2.7
Greenwich (zone 3)	18.1	4.0	40.6	8.4	3.8	0.5	3.1	1.9	4.3	0.6	85.2	2.1
Bromley (zone 6)	4.2	19.2	10.6	14.6	75.6	129.2	91.3	18.1	114.2	26.9	503.8	12.2
Penge (zone 9)	0.6	0.6	0.0	0.0	0.0	0.2	9.5	4.6	47.3	3.0	65.9	1.6
Beckenham (zone 9)	0.0	0.3	2.0	0.3	1.2	0.3	1.5	6.1	40.6	0.4	52.7	1.3
East Dulwich (zone 10)	0.0	8.5	0.0	0.0	0.0	0.0	0.0	4.0	0.0	31.8	44.3	1.1
Sub-total, other comparison goods floorspace in survey area (B)	**172.9**	**139.6**	**53.2**	**36.0**	**80.6**	**130.2**	**105.4**	**36.7**	**207.1**	**84.8**	**1,046.5**	**25.3**
Compar son goods f oorspace outside Lew sham (outs de survey area)												
Central London (incl West End, City, Covent Garden, Shoreditch)	68.6	87.6	54.1	42.4	12.2	14.1	36.7	117.6	32.6	64.7	530.7	12.9
Croydon	4.6	26.9	2.1	2.9	1.2	2.9	30.4	122.7	165.5	31.5	390.7	9.5
of which, town centre	*0.0*	*13.8*	*0.6*	*0.9*	*0.2*	*0.9*	*17.4*	*92.2*	*105.8*	*26.9*	*258.7*	*6.3*
of which, Purley Way retail warehousing	*4.6*	*13.1*	*1.5*	*2.0*	*1.0*	*2.0*	*12.9*	*30.5*	*59.7*	*4.6*	*132.0*	*3.2*
Bluewater	6.9	11.1	82.6	18.4	22.8	8.8	8.3	2.2	9.4	11.1	181.7	4.4
Charlton retail warehousing	5.4	3.9	38.1	1.5	16.6	0.0	0.0	1.5	0.0	0.0	66.9	1.6
Old Kent Road retail warehousing	75.6	104.6	0.4	1.9	0.0	0.0	0.5	1.0	0.0	6.4	190.4	4.6
Brixton	0.0	0.0	0.0	0.0	0.0	2.9	0.0	50.8	0.0	4.8	58.5	1.4
Streatham	0.0	0.0	0.0	0.0	0.4	0.0	0.0	49.5	0.0	0.0	49.9	1.2
Eltham	0.2	0.0	10.0	1.3	19.5	0.0	0.0	0.0	0.0	2.2	33.3	0.8
Stratford (Including Westfield Stratford City)	23.3	0.0	6.8	2.1	0.7	0.0	1.4	0.0	0.0	0.8	35.0	0.8
All other locations outside survey area	29.3	19.6	38.1	30.2	39.0	8.7	12.7	52.2	19.4	16.5	265.7	6.4
Sub-total, comparison goods floorspace outside survey area (C)	**214.0**	**253.7**	**232.2**	**100.8**	**112.3**	**37.4**	**89.9**	**397.6**	**226.9**	**137.8**	**1,802.7**	**43.7**
Local / other shops in survey area (D)	0.0	2.2	10.2	6.8	4.1	0.0	10.6	71.0	32.2	4.0	141.1	3.4
Overall total (A+B+C+D)	**465.3**	**622.2**	**420.7**	**360.5**	**291.8**	**194.6**	**480.4**	**512.9**	**486.7**	**293.1**	**4,128.3**	**100.0**

Source: Table 3, Table 4. 2013 prices.

Table 5e - Comparison goods spend (£m) 2040

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2040	**569.6**	**800.0**	**492.8**	**448.6**	**349.0**	**232.7**	**582.0**	**614.1**	**579.2**	**346.7**	**5,014.6**	***100.0***
Compar son goods f oorspace n Lew sham												
Major town centres												
Lewisham town centre (zone 4)	76.6	221.4	103.8	211.4	42.0	3.3	98.9	1.9	1.1	25.2	785.5	15.7
Catford town centre (zone 7)	2.9	5.5	0.2	10.8	19.9	6.4	43.7	0.0	2.3	0.7	92.4	1.8
Sub-total, major town centres	**79.5**	**226.9**	**104.0**	**222.2**	**61.9**	**9.7**	**142.6**	**1.9**	**3.4**	**25.9**	**878.0**	**17.5**
District centres												
Deptford (zone 1)	13.3	8.1	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.8	26.1	0.5
New Cross (zone 2)	1.0	42.1	0.0	7.2	0.3	0.0	0.0	0.0	0.0	0.0	50.6	1.0
Blackheath (zone 3)	0.3	2.1	7.8	0.8	3.6	0.0	0.0	0.0	0.0	0.0	14.7	0.3
Lee Green (zone 5)	0.5	0.0	25.2	4.0	12.5	0.3	0.0	0.0	0.7	0.0	43.2	0.9
of which, Lee Green District Centre	*0.0*	*0.0*	*10.9*	*3.4*	*11.6*	*0.3*	*0.0*	*0.0*	*0.7*	*0.0*	*27.1*	*0.5*
of which, Sainsbury's, Burnt Ash Road, Lee Green	*0.5*	*0.0*	*14.2*	*0.5*	*0.8*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*16.1*	*0.3*
Downham (zone 6)	0.0	0.0	0.1	0.0	1.2	3.2	0.0	0.0	0.0	0.0	4.5	0.1
Sydenham (zone 7)	0.0	1.8	0.0	0.9	0.1	1.1	66.2	2.7	3.2	4.6	80.6	1.6
Forest Hill (zone 10)	0.0	0.9	0.0	0.0	0.0	0.0	34.2	0.9	0.0	25.7	61.6	1.2
Sub-total, district centres	**15.2**	**54.9**	**37.0**	**13.0**	**17.6**	**4.6**	**100.4**	**3.6**	**3.9**	**31.0**	**281.3**	**5.6**
Out-of-centre retail floorspace in Catford												
Bromley Road retail warehousing (zone 7)	0.5	9.1	5.5	29.5	28.6	14.3	28.1	1.2	6.2	9.5	132.5	2.6
Homebase, Beckenham Hill Road, Catford (zone 7)	0.6	0.0	0.0	2.8	1.1	1.6	0.3	0.0	0.1	0.0	6.7	0.1
Wickes, Catford Hill, Catford (zone 7)	0.1	0.0	0.0	0.0	0.5	0.4	0.8	0.2	0.1	0.0	2.2	0.0
Sub-total, Catford out-of-centre	**1.3**	**9.1**	**5.5**	**32.3**	**30.2**	**16.4**	**29.2**	**1.4**	**6.4**	**9.5**	**141.3**	**2.8**
Other out-of-centre retail floorspace												
Bell Green Retail Park, Sydenham, SE26 4PR (zone 7)	0.0	0.6	0.0	2.5	3.7	1.5	60.3	2.3	10.7	12.1	93.7	1.9
Sub-total, out-of-centre retail floorspace	**0.0**	**0.6**	**0.0**	**2.5**	**3.7**	**1.5**	**60.3**	**2.3**	**10.7**	**12.1**	**93.7**	**1.9**
Sub-total, comparison goods floorspace in Lewisham (A)	**95.9**	**291.4**	**146.6**	**270.0**	**113.4**	**32.2**	**332.5**	**9.2**	**24.4**	**78.6**	**1,394.3**	**27.8**
Compar son goods f oorspace outside Lew sham (within survey area)												
Surrey Quays / Canada Water (zone 1)	172.7	33.2	0.0	15.0	0.0	0.0	0.0	0.0	0.0	4.1	225.1	4.5
Peckham (zone 2)	11.0	104.4	0.0	0.8	0.0	0.0	0.0	2.5	0.8	22.0	141.4	2.8
Greenwich (zone 3)	22.1	5.2	47.5	10.4	4.5	0.6	3.7	2.3	5.1	0.7	102.2	2.0
Bromley (zone 6)	5.1	24.6	12.4	18.1	90.4	154.5	110.6	21.6	135.9	31.8	605.2	12.1
Penge (zone 9)	0.7	0.8	0.0	0.0	0.0	0.3	11.5	5.5	56.3	3.6	78.7	1.6
Beckenham (zone 9)	0.0	0.4	2.3	0.4	1.5	0.3	1.8	7.2	48.3	0.5	62.8	1.3
East Dulwich (zone 10)	0.0	10.9	0.0	0.0	0.0	0.0	0.0	4.8	0.0	37.6	53.3	1.1
Sub-total, other comparison goods floorspace in survey area (B)	**211.7**	**179.5**	**62.3**	**44.7**	**96.4**	**155.7**	**127.7**	**43.9**	**246.5**	**100.3**	**1,268.7**	**25.3**
Compar son goods f oorspace outside Lew sham (outs de survey area)												
Central London (incl West End, City, Covent Garden, Shoreditch)	84.0	112.6	63.4	52.8	14.7	16.8	44.4	140.8	38.9	76.6	644.9	12.9
Croydon	5.6	34.6	2.5	3.6	1.4	3.5	36.8	146.9	196.9	37.3	469.1	9.4
of which, town centre	*0.0*	*17.7*	*0.8*	*1.1*	*0.2*	*1.1*	*21.1*	*110.4*	*125.9*	*31.8*	*310.0*	*6.2*
of which, Purley Way retail warehousing	*5.6*	*16.9*	*1.7*	*2.5*	*1.2*	*2.4*	*15.7*	*36.5*	*71.0*	*5.5*	*159.0*	*3.2*
Bluewater	8.5	14.3	96.7	22.9	27.3	10.5	10.1	2.7	11.2	13.1	217.3	4.3
Charlton retail warehousing	6.6	5.0	44.6	1.8	19.8	0.0	0.0	1.8	0.0	0.0	79.7	1.6
Old Kent Road retail warehousing	92.6	134.4	0.5	2.4	0.0	0.0	0.6	1.2	0.0	7.6	239.3	4.8
Brixton	0.0	0.0	0.0	0.0	0.0	3.5	0.0	60.9	0.0	5.6	69.9	1.4
Streatham	0.0	0.0	0.0	0.0	0.5	0.0	0.0	59.3	0.0	0.0	59.7	1.2
Eltham	0.3	0.0	11.7	1.6	23.4	0.0	0.0	0.0	0.0	2.6	39.6	0.8
Stratford (Including Westfield Stratford City)	28.5	0.0	7.9	2.6	0.8	0.0	1.7	0.0	0.0	0.9	42.4	0.8
All other locations outside survey area	35.9	25.2	44.7	37.6	46.6	10.4	15.4	62.5	23.0	19.5	320.8	6.4
Sub-total, comparison goods floorspace outside survey area (C)	**261.9**	**326.2**	**272.0**	**125.5**	**134.4**	**44.7**	**109.0**	**475.9**	**270.0**	**163.0**	**2,182.7**	**43.5**
Local / other shops in survey area (D)	0.0	2.9	11.9	8.5	4.9	0.0	12.9	84.9	38.3	4.7	169.0	3.4
Overall total (A+B+C+D)	**569.6**	**800.0**	**492.8**	**448.6**	**349.0**	**232.7**	**582.0**	**614.1**	**579.2**	**346.7**	**5,014.6**	**100.0**

Source: Table 3, Table 4. 2013 prices.

Table 6 - Schedule of comparison goods floorspace

In centre floorspace	**Comparison goods floorspace (sq.m net)**
Lewisham town centre	28,277
Catford town centre	12,361
Blackheath district centre	2,705
Deptford district centre	6,171
Downham district centre	1,806
Forest Hill district centre	3,015
Lee Green district centre	1,901
New Cross district centre	2,462
Sydenham district centre	4,790
Total in-centre floorspace	**63,488**
Edge/Out of centre floorspace	**Comparison goods floorspace (sq.m net)**
Bromley Road retail warehousing	5,871
Bell Green retail warehousing	15,212
Catford Bridge retail warehousing	4,108
New Cross Gate retail warehousing	2,431
Homebase, Bromley Road	2,115
Total out-of-centre floorspace	**29,737**
Overall total	**93,225**

Source: Experian Goad Category Reports / Goad Plans. Note: Includes comparison floorspace in major foodstores.

Table 7 - Commitments for new comparison goods floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated comparison A1 floorspace (%)	Estimated comparison A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2020	Estimated turnover 2025	Estimated turnover 2030	Estimated turnover 2035	Estimated turnover 2040	See note
Lewisham Gateway, Lewisham town centre	DC/18/105218	7,725	6180	60%	3,708	6,000	22.2	26.5	29.7	33.3	37.3	1
Asda, Thurston Road, Lewisham		-	-	-	348	8,043	2.8	3.3	3.7	4.2	4.7	2
Carpetright site, Lewisham town centre	DC/17/102049	960	768	30%	230	6,000	1.4	1.6	1.8	2.1	2.3	3
New Bermondsey / Surrey Canal Triangle	DC/11/076357	3,000	2400	50%	1,200	4,000	4.8	5.7	6.4	7.2	8.1	4
Convoys Wharf, Deptford	DC/13/83358	5,810	4648	50%	2,324	4,000	9.3	11.1	12.4	13.9	15.6	5
Oxestalls Road, Deptford	DC/15/092295	10,413	8330.4	20%	1,666	4,000	6.7	8.0	8.9	10.0	11.2	6
Leegate Centre, Lee Green d/centre	DC/14/090032	1,588	1270.4	40%	508	4,000	2.0	2.4	2.7	3.0	3.4	7
Foodstore, Leegate Centre	DC/14/090032	3,847	3077.6	33%	1,016	8,043	8.2	9.7	10.9	12.2	13.7	8
Total	-	-	-	-	-	-	**57.4**	**68.5**	**76.7**	**86.0**	**96.3**	

Notes to turnover assumptions

Note 1 - Total proposed floorspace reflects revised scheme submitted under application DC/18/105218, combined total for Phase 1 and Phase 2. Flexible consent A1-A4 uses granted, assumed 60% of approved floorspace will be A1 comparison, 20% will be A1 convenience, and balance will be A3/A4 uses.

Note 2 - Store is now trading but was not at time of 2015 household survey, so retained as commitment. Turnover of comparison goods floorspace only.

Note 3 - Flexible consent granted for A1, A2, A3, B1, D1 use. Assumed that 30% will be A1 comparison, 30% A1 convenience and balance will be A3/B1/D1 uses.

Note 4 - Flexible consent granted for up to 3,000 sq.m (gross) A1/A2 use. Assumed that 50% will be A1 comparison, 50% will be A1 convenience.

Note 5 - Flexible consent granted for A1 and A2 use. Assumed that 50% of approved floorspace will be for A1 comparison floorspace and 50% for A1 convenience goods floorspace.

Note 6 - Flexible consent granted for A1-A5, B1, D1 and D2 uses. Owing to the wide range of approved uses, we have assumed 20% will come forward for A1 comparison floorspace, 20% for A1 convenience floorspace, and the balance for A3/ A4/ A5/ B1/ D1 and D2 use.

Note 7 - Flexible consent granted for A1, A2 and A3 use (excluding foodstore, see Note 8). Assumed 40% will be A1 comparison, 40% will be A1 convenience, 20% A2/A3.

Note 8 - non-food floorspace within foodstore assumed at 33% of total net sales area (company average for intended occupier, Asda)

Table 8a - Lewisham town centre floorspace capacity

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	2,390.2	2,854.4	3,411.8	*4,128.3*	*5,014.6*
Market Share from Survey Area (%)	15	15	15	*15*	*16*
Comparison goods spending in Lewisham town centre (£m)	361.0	434.4	520.9	*636.6*	*785.5*
Total comparison goods spending (£m)	**361.0**	**434.4**	**520.9**	***636.6***	***785.5***
Existing Retail Floorspace (sq.m net)	28,277	28,277	28,277	*28,277*	*28,277*
Sales per sqm net (£)	12,766	14,613	16,373	*18,344*	*20,553*
Sales from Existing Floorspace (£m)	361.0	413.2	463.0	*518.7*	*581.2*
Sales from Committed Floorspace (£m)	0.0	31.5	35.3	*39.6*	*44.4*
Residual Spending to support new floorspace (£000)	0.0	-10.3	22.6	*78.2*	*160.0*
Sales per sq m net in new shops (£)*	7,500	8,585	9,619	*10,777*	*12,075*
Capacity for new floorspace (sqm net)	**0**	**-1,204**	**2,349**	***7,261***	***13,251***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-1,200**	**2,300**	***7,300***	***13,300***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 8b - Catford town centre floorspace capacity

	2020	2025	2030	*Long-term needs - indicative* *2035*	*2040*
Total Available Expenditure (£m)	2,390.2	2,854.4	3,411.8	*4,128.3*	*5,014.6*
Market Share from Survey Area (%)	2	2	2	*2*	*2*
Comparison goods spending in Catford town centre (£m)	44.9	53.6	63.3	*76.1*	*92.4*
Total comparison goods spending (£m)	**44.9**	**53.6**	**63.3**	***76.1***	***92.4***
Existing Retail Floorspace (sq.m net)	12,361	12,361	12,361	*12,361*	*12,361*
Sales per sqm net (£)	3,634	4,160	4,661	*5,222*	*5,851*
Sales from Existing Floorspace (£m)	44.9	51.4	57.6	*64.6*	*72.3*
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	*0.0*	*0.0*
Residual Spending to support new floorspace (£000)	0.0	2.2	5.7	*11.5*	*20.1*
Sales per sq m net in new shops (£)*	6,000	6,868	7,695	*8,622*	*9,660*
Capacity for new floorspace (sqm net)	**0**	**324**	**740**	***1,338***	***2,080***
Capacity for new floorspace (sq.m net, rounded)	**0**	**300**	**700**	***1,300***	***2,100***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 8c - District centres floorspace capacity

	2020	2025	2030	*2035*	*2040*
				Long-term needs - indicative	
Total Available Expenditure (£m)	2,390.2	2,854.4	3,411.8	*4,128.3*	*5,014.6*
Market Share from Survey Area (%)	6	6	6	*6*	*6*
Comparison goods spending in district centres (£m)	134.7	159.9	191.3	*231.2*	*281.3*
Total comparison goods spending (£m)	**134.7**	**159.9**	**191.3**	***231.2***	***281.3***
Existing Retail Floorspace (sq.m net)	22,850	22,850	22,850	*22,850*	*22,850*
Sales per sqm net (£)	5,894	6,747	7,560	*8,470*	*9,490*
Sales from Existing Floorspace (£m)	134.7	154.2	172.7	*193.5*	*216.8*
Sales from Committed Floorspace (£m)	0.0	12.2	13.6	*15.3*	*17.1*
Residual Spending to support new floorspace (£000)	0.0	-6.4	4.9	*22.4*	*47.4*
Sales per sq m net in new shops (£)*	6,000	6,868	7,695	*8,622*	*9,660*
Capacity for new floorspace (sqm net)	**0**	**-935**	**640**	***2,595***	***4,904***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-900**	**600**	***2,600***	***4,900***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 8d - Out-of-centre floorspace capacity

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	2,390.2	2,854.4	3,411.8	*4,128.3*	*5,014.6*
Market Share from Survey Area (%)	5	5	5	*5*	*5*
Comparison goods spending in out-of-centre locations (£m)	116.5	137.9	162.1	*194.1*	*235.0*
Total comparison goods spending (£m)	**116.5**	**137.9**	**162.1**	***194.1***	***235.0***
Existing Retail Floorspace (sq.m net)	29,737	29,737	29,737	*29,737*	*29,737*
Sales per sqm net (£)	3,918	4,485	5,025	*5,630*	*6,308*
Sales from Existing Floorspace (£m)	116.5	133.4	149.4	*167.4*	*187.6*
Sales from Committed Floorspace (£m)	0.0	24.8	27.8	*31.1*	*34.8*
Residual Spending to support new floorspace (£000)	0.0	-20.2	-15.1	*-4.4*	*12.5*
Sales per sq m net in new shops (£)	6,000	6,868	7,695	*8,622*	*9,660*
Capacity for new floorspace (sqm net)	**0**	**-2,940**	**-1,956**	***-506***	***1,299***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-2,900**	**-2,000**	***-500***	***1,300***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 9 - Total comparison goods floorspace capacity

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
8a. Lewisham town centre capacity	0	-1,204	2,349	7,261	13,251
8b. Catford town centre capacity	0	324	740	1,338	2,080
8c. District centres capacity (combined)	0	-935	640	2,595	4,904
8d. Out-of-centre capacity	0	-2,940	-1,956	-506	1,299
Capacity for new floorspace (sqm net)	**0**	**-4,754**	**1,773**	**10,687**	**21,534**
Capacity for new floorspace (sq.m net, rounded)	**0**	**-4,800**	**1,800**	***10,700***	***21,500***

Appendix 2
Convenience goods ‘baseline’ need

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
2015	74,583	108,353	61,360	61,725	55,165	28,659	90,980	96,748	90,153	46,475	**714,201**
2020	84,422	115,093	64,199	67,081	56,171	30,425	94,022	99,553	92,323	47,714	**751,002**
2025	93,559	125,615	65,598	69,165	60,869	32,756	95,440	100,264	94,332	47,598	**785,196**
2030	103,655	136,900	67,086	68,213	59,821	34,351	97,791	100,928	95,569	47,389	**811,703**
2035	111,011	149,664	68,356	70,610	60,865	35,542	100,353	102,627	98,128	47,523	**844,679**
2040	116,243	164,595	68,477	75,158	62,278	36,343	104,005	105,091	99,895	48,077	**880,163**
Change 2020-40	***31,821***	***49,502***	***4,278***	***8,078***	***6,107***	***5,918***	***9,983***	***5,538***	***7,573***	***363***	***129,161***

Source: Experian Micromarketer (October 2014) for 2015 projections; ward-based GLA population projections applied to base Experian forecasts for all remaining interval years.

Table 1a - Survey area postcode sectors

Zone	Postal Sectors
Zone 1	SE16 2/3/6/7, SE8 3/4/5
Zone 2	SE15 1/2/3/4/5/6, SE4 2/5/6
Zone 3	SE4 1, SE13 5/6/7
Zone 4	SE10 8/9, SE3 0/7/8/9, SE12 8
Zone 5	SE6 1, BR1 5, SE12 0/9
Zone 6	BR1 1/3/4
Zone 7	SE23 1/2, SE6 2/3/4, SE26 4/5/6
Zone 8	CR7 8, SE19 1/3, SW16 3, SE27 0/8/9, SW2 3
Zone 9	SE25 4/6, SE19 2, SE20 7/8, BR3 1/4/5
Zone 10	SE21 7, SE22 0/8/9/, SE23 3

Source: Lewisham Household Survey, November 2015

Table 2 - Survey area per capita expenditure forecasts, convenience goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)
2020	1,829	1,803	2,471	2,094	1,995	2,161	1,988	2,053	1,985	2,424
2020 Minus SFT at 4.3%	1,751	1,725	2,365	2,004	1,909	2,068	1,903	1,965	1,899	2,320
2025	1,839	1,812	2,483	2,104	2,005	2,171	1,998	2,063	1,994	2,437
2025 Minus SFT at 5.0%	1,747	1,721	2,359	1,999	1,904	2,063	1,898	1,960	1,895	2,315
2030	1,848	1,821	2,496	2,115	2,015	2,182	2,008	2,073	2,004	2,449
2030 Minus SFT at 5.3%	1,746	1,720	2,358	1,998	1,904	2,062	1,898	1,959	1,894	2,314
2035	1,857	1,830	2,508	2,125	2,025	2,193	2,018	2,084	2,015	2,461
2035 Minus SFT at 5.8%	1,749	1,724	2,363	2,002	1,907	2,066	1,901	1,963	1,898	2,318
2040	1,866	1,839	2,521	2,136	2,035	2,204	2,029	2,094	2,025	2,473
2040 Minus SFT at 5.9%	1,756	1,730	2,372	2,010	1,915	2,074	1,909	1,971	1,905	2,327

Source: Experian Micromarketer, October 2015. Growth rates and allowance for SFT are dervied from Experian Retail Planner 13, Figure 1a (for growth rates) / Figure 5 (for SFT)

Table 3 - Survey retail expenditure, convenience goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2020	147.8	198.5	151.8	134.4	107.2	62.9	178.9	195.6	175.3	110.7	**1,463.2**
2025	163.4	216.2	154.8	138.3	115.9	67.6	181.2	196.5	178.7	110.2	**1,522.7**
2030	181.0	235.5	158.2	136.3	113.9	70.8	185.6	197.8	181.0	109.7	**1,569.9**
2035	194.2	258.0	161.5	141.4	116.1	73.4	190.8	201.5	186.2	110.2	**1,633.2**
2040	204.1	284.8	162.4	151.1	119.3	75.4	198.5	207.1	190.3	111.9	**1,704.9**
Change 2020-40	***56.3***	***86.3***	***10.6***	***16.7***	***12.0***	***12.5***	***19.6***	***11.5***	***15.0***	***1.2***	***241.7***

Source: Tables 1 & 2. 2013 prices.

Table 4 - Convenience goods market share (%) - 2015

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	
Convenience goods floorspace in Lewisham (main stores)											
Deptford district centre stores (zone 1)											
Asda, Deptford High Street *(in-centre)*	0.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	#
Iceland, Deptford High Street *(in-centre)*	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	#
Tesco Express, Deptford High Street *(in-centre)*	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Other stores, Deptford	5.4%	2.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	
Sub-total, Deptford district centre stores	**7.6%**	**4.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**0.0%**	**0.0%**	**0.0%**	
New Cross district centre stores (zone 2)											
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	0.7%	10.5%	0.0%	1.3%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	
Iceland, New Cross Road, New Cross *(in-centre)*	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	0.7%	1.5%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Other stores, New Cross	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Sub-total, New Cross district centre stores	**1.5%**	**16.0%**	**0.0%**	**1.5%**	**0.0%**	**0.0%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**	
Blackheath district centre stores (zone 3)											
Other stores, Blackheath	0.0%	0.0%	2.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Sub-total, Blackheath district centre stores	**0.0%**	**0.0%**	**2.0%**	**0.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	
Blackheath other stores (zone 3)											
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0%	0.0%	4.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Sub-total, Blackheath other stores	**0.0%**	**0.0%**	**4.4%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	
Lewisham town centre stores (zone 4)											
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	3.4%	5.3%	3.1%	20.5%	4.6%	0.0%	6.0%	0.4%	0.0%	3.7%	
Marks & Spencer, High Street, Lewisham *(in-centre)*	1.7%	1.0%	3.4%	2.9%	0.8%	0.0%	3.0%	0.0%	0.0%	2.7%	
Iceland, High Street, Lewisham *(in-centre)*	0.6%	0.4%	1.2%	3.4%	0.5%	0.0%	1.4%	0.2%	0.0%	0.5%	
Tesco Express, High Street, Lewisham *(in-centre)*	0.0%	0.2%	0.7%	1.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0%	1.0%	2.2%	3.4%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0%	0.0%	0.8%	1.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0%	0.0%	0.4%	2.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	
Other stores, Lewisham	1.4%	1.1%	1.6%	3.3%	1.5%	0.2%	2.2%	0.0%	0.0%	1.3%	
Sub-total, Lewisham town centre stores	**7.0%**	**8.9%**	**13.4%**	**38.3%**	**10.9%**	**0.2%**	**12.6%**	**0.5%**	**0.0%**	**8.1%**	
Lewisham other stores (zone 4)											
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	3.5%	3.1%	4.2%	18.7%	3.8%	0.9%	3.2%	0.0%	0.0%	0.3%	
Sub-total, Lewisham other stores	**3.5%**	**3.1%**	**4.2%**	**18.7%**	**3.8%**	**0.9%**	**3.2%**	**0.0%**	**0.0%**	**0.3%**	

Table 4 - Convenience goods market share (%) - 2015 - continued

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)
Lee Green district centre stores (zone 5)										
Sainsbury's, Burnt Ash Road, Lee Green *(in-centre)*	0.0%	0.0%	25.5%	10.0%	23.4%	0.3%	0.0%	1.0%	0.0%	0.5%
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Lee Green	0.0%	0.0%	0.5%	0.0%	2.3%	0.0%	0.5%	0.0%	0.0%	0.0%
Sub-total, Lee Green district centre stores	**0.0%**	**0.0%**	**26.0%**	**10.0%**	**27.1%**	**0.3%**	**0.5%**	**1.0%**	**0.0%**	**0.5%**
Downham district centre stores (zone 5)										
M&S Simply Food (BP PFS), Bromley Road, Downham	0.1%	0.0%	0.0%	0.0%	1.6%	7.7%	0.6%	0.2%	0.6%	0.7%
Iceland, Bromley Road, Downham	0.0%	0.0%	0.0%	0.0%	0.8%	1.9%	0.5%	0.0%	0.0%	0.0%
Tesco Express, Bromley Road, Downham	0.0%	0.0%	0.2%	0.0%	0.8%	1.8%	0.0%	0.0%	0.0%	0.0%
Co-Operative, Bromley Road, Downham	0.0%	0.0%	0.0%	0.0%	1.2%	1.2%	0.0%	0.0%	0.0%	0.0%
Sub-total, Downham district centre stores	**0.1%**	**0.0%**	**0.2%**	**0.0%**	**4.4%**	**12.6%**	**1.1%**	**0.2%**	**0.6%**	**0.7%**
Catford town centre stores (zone 7)										
Aldi, Rushey Green, Catford *(in-centre)*	0.0%	1.4%	0.0%	5.4%	4.6%	0.8%	2.4%	0.3%	0.0%	2.3%
Tesco, Catford Centre, Catford *(in-centre)*	0.0%	0.3%	0.0%	1.3%	0.7%	0.9%	4.2%	0.0%	0.7%	0.0%
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0%	0.0%	0.0%	1.5%	0.5%	2.7%	1.6%	0.0%	0.0%	0.0%
Lidl, Catford Island, Catford *(in-centre)*	0.0%	0.1%	0.0%	1.6%	1.0%	0.9%	0.9%	0.2%	0.0%	0.1%
Other stores, Catford	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.5%	0.0%	0.0%	0.0%
Sub-total, Catford town centre stores	**0.0%**	**1.8%**	**0.0%**	**9.7%**	**7.1%**	**5.5%**	**9.6%**	**0.4%**	**0.7%**	**2.4%**
Catford other stores (zone 7)										
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0%	0.0%	0.0%	0.0%	2.1%	1.2%	2.2%	0.0%	0.1%	0.1%
Sub-total, Catford other stores	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**1.2%**	**2.2%**	**0.0%**	**0.1%**	**0.1%**
Sydenham district centre stores (zone 7)										
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.2%	0.0%	1.8%
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%
Other stores, Sydenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.9%
Sub-total, Sydenham district centre stores	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**10.8%**	**0.2%**	**0.0%**	**2.6%**
Sydenham other stores (zone 7)										
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0%	0.3%	0.0%	1.9%	4.4%	1.3%	36.2%	3.6%	3.3%	6.6%
Sub-total, Sydenham out-of-centre stores	**0.0%**	**0.3%**	**0.0%**	**1.9%**	**4.4%**	**1.3%**	**36.2%**	**3.6%**	**3.3%**	**6.6%**
Forest Hill district centre stores (zone 10)										
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	4.3%	2.7%	0.0%	27.0%
Other stores, Forest Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	1.9%
Sub-total, Forest Hill	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**6.5%**	**2.7%**	**0.0%**	**29.0%**
Total for main stores & centres in Lewisham (A)	**19.7%**	**34.4%**	**50.3%**	**80.7%**	**59.9%**	**22.1%**	**83.4%**	**8.6%**	**4.8%**	**50.4%**

Table 4 - Convenience goods market share (%) - 2015 - continued

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)
Convenience goods floorspace outside Lewisham										
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	43.3%	6.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Lidl, Bestwood Street, Bermondsey (zone 1)	5.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Old Kent Road, Bermondsey (zone 2)	3.0%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Morrisons, Aylesham Centre, Peckham (zone 2)	1.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	2.3%
Waitrose, New Capital Quay, Greenwich (zone 3)	0.8%	1.3%	3.1%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0%	0.0%	0.0%	0.0%	2.9%	16.2%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0%	0.0%	1.4%	0.1%	1.5%	25.0%	0.0%	0.0%	3.1%	0.0%
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	7.7%	4.5%	0.0%
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	8.7%	0.2%	0.0%
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	0.6%
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%
Sainsbury's, High Street, Penge (zone 9)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.2%	15.7%	0.0%
Aldi, Croydon Road, Anerley (zone 9)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%	11.1%	0.2%
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	9.3%	0.0%
Waitrose, Southend Road, Beckenham (zone 9)	0.0%	0.0%	0.0%	0.0%	0.9%	3.1%	2.1%	6.5%	4.3%	3.2%
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.9%	0.0%	8.4%	0.0%
Tesco, Croydon Road, Beckenham (zone 9)	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	8.9%	0.0%
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0%	4.2%	0.0%	1.3%	0.0%	0.0%	0.0%	4.1%	0.0%	9.6%
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.3%	1.2%	0.0%	12.0%
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Sub-total, other stores in survey area (B)	**54.0%**	**36.9%**	**4.5%**	**4.5%**	**9.4%**	**44.4%**	**6.2%**	**42.4%**	**66.1%**	**33.4%**
Stores outside survey area										
Asda, Old Kent Road, Southwark	2.9%	9.5%	0.2%	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.3%
Asda, Bugsby Way, Charlton	0.0%	0.1%	3.7%	1.4%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Charlton Riverside, Charlton	0.3%	0.1%	5.9%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, Fenton Parade, Greenwich	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Tesco Extra, Streatham High Road, Streatham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%
Waitrose, Masons Hill, Bromley	0.0%	0.0%	0.5%	0.0%	0.0%	5.7%	0.1%	0.3%	0.0%	0.0%
All other foodstores outside survey area	12.5%	5.6%	13.4%	2.3%	14.8%	1.8%	1.2%	26.4%	8.2%	4.1%
Sub-total, stores outside survey area (C)	**15.8%**	**15.3%**	**31.0%**	**3.9%**	**21.2%**	**7.5%**	**1.8%**	**31.6%**	**8.2%**	**4.3%**
Total for stores outside survey area (B+C)	**69.8%**	**52.1%**	**35.5%**	**8.4%**	**30.6%**	**51.9%**	**8.0%**	**74.0%**	**74.3%**	**37.8%**
Local convenience goods										
Local / other shops in survey area **(D)**	10.5%	13.4%	14.2%	10.9%	9.5%	26.0%	8.6%	17.3%	20.9%	11.8%
Total (A+B+C+D)	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey, September 2015

Table 5b - Convenience goods spend (£m) 2020

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace in Lewisham (main stores)												
Deptford district centre stores (zone 1)												
Asda, Deptford High Street *(in-centre)*	0.8	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.3%**
Iceland, Deptford High Street *(in-centre)*	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Tesco Express, Deptford High Street *(in-centre)*	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Other stores, Deptford	7.9	4.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**12.5**	**0.9%**
Sub-total, Deptford district centre stores	**11.3**	**8.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**0.0**	**0.0**	**0.0**	**20.3**	**1.4%**
New Cross district centre stores (zone 2)												
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	1.1	20.9	0.0	1.7	0.0	0.0	0.9	0.0	0.0	0.0	**24.6**	**1.7%**
Iceland, New Cross Road, New Cross *(in-centre)*	0.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3%**
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	1.1	3.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.3%**
Other stores, New Cross	0.0	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.4**	**0.2%**
Sub-total, New Cross district centre stores	**2.2**	**31.8**	**0.0**	**2.0**	**0.0**	**0.0**	**0.9**	**0.0**	**0.0**	**0.0**	**36.9**	**2.5%**
Blackheath district centre stores (zone 3)												
Other stores, Blackheath	0.0	0.0	3.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**3.4**	**0.2%**
Sub-total, Blackheath district centre stores	**0.0**	**0.0**	**3.1**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.4**	**0.2%**
Blackheath other stores (zone 3)												
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0	0.0	6.7	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**7.1**	**0.5%**
Sub-total, Blackheath other stores	**0.0**	**0.0**	**6.7**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**7.1**	**0.5%**
Lewisham town centre stores (zone 4)												
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	5.0	10.6	4.7	27.5	4.9	0.0	10.7	0.7	0.0	4.0	**68.2**	**4.7%**
Marks & Spencer, High Street, Lewisham *(in-centre)*	2.5	1.9	5.2	3.9	0.9	0.0	5.3	0.0	0.0	3.0	**22.7**	**1.5%**
Iceland, High Street, Lewisham *(in-centre)*	0.8	0.7	1.9	4.6	0.5	0.0	2.5	0.3	0.0	0.5	**11.9**	**0.8%**
Tesco Express, High Street, Lewisham *(in-centre)*	0.0	0.4	1.0	2.3	0.4	0.0	0.0	0.0	0.0	0.0	**4.2**	**0.3%**
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0	2.0	3.3	4.5	2.6	0.0	0.0	0.0	0.0	0.0	**12.4**	**0.9%**
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	1.2	1.4	0.7	0.0	0.0	0.0	0.0	0.0	**3.3**	**0.2%**
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	0.6	2.8	0.2	0.0	0.0	0.0	0.0	0.0	**3.6**	**0.2%**
Other stores, Lewisham	2.1	2.1	2.4	4.5	1.6	0.1	3.9	0.0	0.0	1.4	**18.1**	**1.2%**
Sub-total, Lewisham town centre stores	**10.4**	**17.8**	**20.4**	**51.5**	**11.7**	**0.1**	**22.5**	**1.1**	**0.0**	**9.0**	**144.3**	**9.9%**
Lewisham other stores (zone 4)												
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	5.1	6.1	6.3	25.2	4.1	0.6	5.8	0.0	0.0	0.4	**53.6**	**3.7%**
Sub-total, Lewisham other stores	**5.1**	**6.1**	**6.3**	**25.2**	**4.1**	**0.6**	**5.8**	**0.0**	**0.0**	**0.4**	**53.6**	**3.7%**

Table 5b - Convenience goods spend (£m) 2020 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Total Available Spend - 2016	**147.8**	**198.5**	**151.8**	**134.4**	**107.2**	**62.9**	**178.9**	**195.6**	**175.3**	**110.7**	**1,463.2**	**100.0**
Lee Green district centre stores (zone 5)												
Sainsbury's, Burnt Ash Road, Lee Green *(in-centre)*	0.0	0.0	38.7	13.5	25.1	0.2	0.0	2.0	0.0	0.5	**79.9**	**5.5%**
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	**1.5**	**0.1%**
Other stores, Lee Green	0.0	0.0	0.8	0.0	2.4	0.0	0.9	0.0	0.0	0.0	**4.1**	**0.3%**
Sub-total, Lee Green district centre stores	**0.0**	**0.0**	**39.5**	**13.5**	**29.0**	**0.2**	**0.9**	**2.0**	**0.0**	**0.5**	**85.5**	**5.8%**
Downham district centre stores (zone 5)												
M&S Simply Food (BP PFS), Bromley Road, Downham	0.2	0.0	0.0	0.0	1.8	4.8	1.1	0.3	1.1	0.7	**10.1**	**0.7%**
Iceland, Bromley Road, Downham	0.0	0.0	0.0	0.0	0.9	1.2	0.9	0.0	0.0	0.0	**3.0**	**0.2%**
Tesco Express, Bromley Road, Downham	0.0	0.0	0.4	0.0	0.8	1.1	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Co-Operative, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.3	0.7	0.0	0.0	0.0	0.0	**2.0**	**0.1%**
Sub-total, Downham district centre stores	**0.2**	**0.0**	**0.4**	**0.0**	**4.7**	**7.9**	**2.0**	**0.3**	**1.1**	**0.7**	**17.3**	**1.2%**
Catford town centre stores (zone 7)												
Aldi, Rushey Green, Catford *(in-centre)*	0.0	2.7	0.0	7.2	4.9	0.5	4.4	0.5	0.0	2.5	**22.8**	**1.6%**
Tesco, Catford Centre, Catford *(in-centre)*	0.0	0.6	0.0	1.7	0.8	0.6	7.4	0.0	1.2	0.0	**12.3**	**0.8%**
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0	0.0	0.0	2.0	0.6	1.7	2.9	0.0	0.0	0.0	**7.1**	**0.5%**
Lidl, Catford Island, Catford *(in-centre)*	0.0	0.2	0.0	2.1	1.0	0.6	1.6	0.3	0.0	0.2	**6.0**	**0.4%**
Other stores, Catford	0.0	0.0	0.0	0.0	0.3	0.1	0.9	0.0	0.0	0.0	**1.3**	**0.1%**
Sub-total, Catford town centre stores	**0.0**	**3.6**	**0.0**	**13.0**	**7.6**	**3.4**	**17.1**	**0.8**	**1.2**	**2.7**	**49.5**	**3.4%**
Catford other stores (zone 7)												
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0	0.0	0.0	0.0	2.3	0.8	4.0	0.0	0.2	0.2	**7.4**	**0.5%**
Sub-total, Catford other stores	**0.0**	**0.0**	**0.0**	**0.0**	**2.3**	**0.8**	**4.0**	**0.0**	**0.2**	**0.2**	**7.4**	**0.5%**
Sydenham district centre stores (zone 7)												
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	8.3	0.4	0.0	2.0	**10.6**	**0.7%**
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	**4.0**	**0.3%**
Other stores, Sydenham	0.0	0.0	0.0	0.0	0.0	0.0	7.0	0.0	0.0	1.0	**8.0**	**0.5%**
Sub-total, Sydenham district centre stores	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**19.3**	**0.4**	**0.0**	**2.9**	**22.6**	**1.5%**
Sydenham other stores (zone 7)												
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0	0.5	0.0	2.5	4.7	0.8	64.8	7.0	5.9	7.3	**93.5**	**6.4%**
Sub-total, Sydenham out-of-centre stores	**0.0**	**0.5**	**0.0**	**2.5**	**4.7**	**0.8**	**64.8**	**7.0**	**5.9**	**7.3**	**93.5**	**6.4%**
Forest Hill district centre stores (zone 10)												
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.1	7.7	5.3	0.0	29.9	**43.1**	**2.9%**
Other stores, Forest Hill	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	2.1	**6.0**	**0.4%**
Sub-total, Forest Hill	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**11.6**	**5.3**	**0.0**	**32.1**	**49.1**	**3.4%**
Total for main stores & centres in Lewisham (A)	**29.1**	**68.4**	**76.3**	**108.5**	**64.2**	**13.9**	**149.3**	**16.9**	**8.4**	**55.8**	**590.7**	**40.4%**

Table 5b - Convenience goods spend (£m) 2020 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace outside Lewisham												
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	64.1	13.2	0.0	1.7	0.0	0.0	0.0	0.0	1.0	0.5	**80.4**	**5.5%**
Lidl, Bestwood Street, Bermondsey (zone 1)	8.5	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**10.6**	**0.7%**
Aldi, Old Kent Road, Bermondsey (zone 2)	4.5	15.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**21.1**	**1.4%**
Morrisons, Aylesham Centre, Peckham (zone 2)	1.5	22.4	0.0	0.0	0.0	0.0	1.2	0.0	0.0	2.5	**27.6**	**1.9%**
Waitrose, New Capital Quay, Greenwich (zone 3)	1.2	2.7	4.7	2.5	0.0	0.0	0.0	0.0	0.0	0.0	**11.1**	**0.8%**
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0	0.0	0.0	0.0	3.1	10.2	0.0	0.0	0.0	0.0	**13.3**	**0.9%**
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0	0.0	2.1	0.2	1.6	15.8	0.0	0.0	5.4	0.0	**25.0**	**1.7%**
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.9	15.1	8.0	0.0	**24.0**	**1.6%**
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0	0.0	0.0	0.0	0.3	0.0	0.0	17.1	0.4	0.0	**17.8**	**1.2%**
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.7	0.0	0.7	**11.4**	**0.8%**
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.9	0.0	0.0	**7.9**	**0.5%**
Sainsbury's, High Street, Penge (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.3	27.6	0.0	**30.4**	**2.1%**
Aldi, Croydon Road, Anerley (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.4	19.5	0.2	**21.6**	**1.5%**
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.2	16.2	0.0	**22.4**	**1.5%**
Waitrose, Southend Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.9	2.0	3.8	12.7	7.5	3.5	**30.3**	**2.1%**
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	3.4	0.0	1.6	0.0	14.8	0.0	**19.8**	**1.4%**
Tesco, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.7	0.0	0.0	1.2	15.6	0.0	**17.6**	**1.2%**
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0	8.3	0.0	1.7	0.0	0.0	0.0	8.1	0.0	10.6	**28.6**	**2.0%**
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0	9.1	0.0	0.0	0.0	0.0	0.6	2.3	0.0	13.2	**25.2**	**1.7%**
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	**4.8**	**0.3%**
Sub-total, other stores in survey area (B)	**79.8**	**73.2**	**6.8**	**6.1**	**10.1**	**27.9**	**11.1**	**83.0**	**115.9**	**37.0**	**451.0**	**30.8%**
Stores outside survey area												
Asda, Old Kent Road, Southwark	4.3	18.8	0.4	0.2	0.0	0.0	0.8	0.0	0.0	0.3	**24.7**	**1.7%**
Asda, Bugsby Way, Charlton	0.0	0.2	5.6	1.9	6.4	0.0	0.0	0.0	0.0	0.0	**14.2**	**1.0%**
Sainsbury's, Charlton Riverside, Charlton	0.5	0.2	9.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**10.1**	**0.7%**
Sainsbury's Local, Fenton Parade, Greenwich	0.0	0.0	11.2	0.0	0.0	0.0	0.0	1.4	0.0	0.0	**12.6**	**0.9%**
Tesco Extra, Streatham High Road, Streatham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.1	0.0	0.0	**8.1**	**0.6%**
Waitrose, Masons Hill, Bromley	0.0	0.0	0.7	0.0	0.0	3.6	0.3	0.6	0.0	0.0	**5.2**	**0.4%**
All other foodstores outside survey area	18.5	11.1	20.3	3.1	15.8	1.1	2.2	51.7	14.4	4.5	**142.7**	**9.8%**
Sub-total, stores outside survey area (C)	**23.3**	**30.3**	**47.1**	**5.2**	**22.7**	**4.7**	**3.2**	**61.8**	**14.4**	**4.8**	**217.6**	**14.9%**
Total for stores outside survey area (B+C)	**103.1**	**103.5**	**53.9**	**11.3**	**32.8**	**32.6**	**14.3**	**144.8**	**130.3**	**41.8**	**668.5**	**45.7%**
Local convenience goods												
Local / other shops in survey area **(D)**	15.6	26.7	21.6	14.6	10.2	16.4	15.3	33.9	36.6	13.1	**204.0**	**13.9%**
Total (A+B+C+D)	**147.8**	**198.5**	**151.8**	**134.4**	**107.2**	**62.9**	**178.9**	**195.6**	**175.3**	**110.7**	**1,463.2**	**100.0%**

Source: Table 3, Table 4

Table 5b - Convenience goods spend (£m) 2025

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace in Lewisham (main stores)												
Deptford district centre stores (zone 1)												
Asda, Deptford High Street *(in-centre)*	0.9	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.3%**
Iceland, Deptford High Street *(in-centre)*	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2%**
Tesco Express, Deptford High Street *(in-centre)*	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Other stores, Deptford	8.8	4.5	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**13.7**	**0.9%**
Sub-total, Deptford district centre stores	**12.5**	**9.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**0.0**	**0.0**	**0.0**	**22.3**	**1.5%**
New Cross district centre stores (zone 2)												
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	1.2	22.7	0.0	1.8	0.0	0.0	0.9	0.0	0.0	0.0	**26.7**	**1.8%**
Iceland, New Cross Road, New Cross *(in-centre)*	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.3%**
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	1.2	3.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.3%**
Other stores, New Cross	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.7**	**0.2%**
Sub-total, New Cross district centre stores	**2.4**	**34.6**	**0.0**	**2.1**	**0.0**	**0.0**	**0.9**	**0.0**	**0.0**	**0.0**	**40.1**	**2.6%**
Blackheath district centre stores (zone 3)												
Other stores, Blackheath	0.0	0.0	3.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.2%**
Sub-total, Blackheath district centre stores	**0.0**	**0.0**	**3.1**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.5**	**0.2%**
Blackheath other stores (zone 3)												
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0	0.0	6.8	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**7.3**	**0.5%**
Sub-total, Blackheath other stores	**0.0**	**0.0**	**6.8**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**7.3**	**0.5%**
Lewisham town centre stores (zone 4)												
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	5.5	11.5	4.8	28.3	5.3	0.0	10.9	0.7	0.0	4.0	**71.1**	**4.7%**
Marks & Spencer, High Street, Lewisham *(in-centre)*	2.7	2.1	5.3	4.0	1.0	0.0	5.4	0.0	0.0	3.0	**23.4**	**1.5%**
Iceland, High Street, Lewisham *(in-centre)*	0.9	0.8	1.9	4.7	0.5	0.0	2.6	0.3	0.0	0.5	**12.2**	**0.8%**
Tesco Express, High Street, Lewisham *(in-centre)*	0.0	0.4	1.0	2.4	0.5	0.0	0.0	0.0	0.0	0.0	**4.3**	**0.3%**
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0	2.2	3.4	4.7	2.8	0.0	0.0	0.0	0.0	0.0	**13.0**	**0.9%**
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	1.2	1.5	0.7	0.0	0.0	0.0	0.0	0.0	**3.4**	**0.2%**
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	0.7	2.9	0.2	0.0	0.0	0.0	0.0	0.0	**3.7**	**0.2%**
Other stores, Lewisham	2.3	2.3	2.5	4.6	1.7	0.1	4.0	0.0	0.0	1.4	**18.9**	**1.2%**
Sub-total, Lewisham town centre stores	**11.5**	**19.3**	**20.8**	**53.0**	**12.7**	**0.1**	**22.8**	**1.1**	**0.0**	**8.9**	**150.1**	**9.9%**
Lewisham other stores (zone 4)												
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	5.6	6.6	6.5	25.9	4.5	0.6	5.9	0.0	0.0	0.4	**55.9**	**3.7%**
Sub-total, Lewisham other stores	**5.6**	**6.6**	**6.5**	**25.9**	**4.5**	**0.6**	**5.9**	**0.0**	**0.0**	**0.4**	**55.9**	**3.7%**

Table 5b - Convenience goods spend (£m) 2025 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Total Available Spend - 2025	**163.4**	**216.2**	**154.8**	**138.3**	**115.9**	**67.6**	**181.2**	**196.5**	**178.7**	**110.2**	**1,522.7**	**100.0**
Lee Green district centre stores (zone 5)												
Sainsbury's, Burnt Ash Road, Lee Green (*in-centre*)	0.0	0.0	39.4	13.9	27.1	0.2	0.0	2.0	0.0	0.5	**83.1**	**5.5%**
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.1%**
Other stores, Lee Green	0.0	0.0	0.8	0.0	2.6	0.0	0.9	0.0	0.0	0.0	**4.3**	**0.3%**
Sub-total, Lee Green district centre stores	**0.0**	**0.0**	**40.2**	**13.9**	**31.4**	**0.2**	**0.9**	**2.0**	**0.0**	**0.5**	**89.1**	**5.9%**
Downham district centre stores (zone 5)												
M&S Simply Food (BP PFS), Bromley Road, Downham	0.2	0.0	0.0	0.0	1.9	5.2	1.1	0.3	1.2	0.7	**10.6**	**0.7%**
Iceland, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.0	1.3	0.9	0.0	0.0	0.0	**3.1**	**0.2%**
Tesco Express, Bromley Road, Downham	0.0	0.0	0.4	0.0	0.9	1.2	0.0	0.0	0.0	0.0	**2.4**	**0.2%**
Co-Operative, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.4	0.8	0.0	0.0	0.0	0.0	**2.2**	**0.1%**
Sub-total, Downham district centre stores	**0.2**	**0.0**	**0.4**	**0.0**	**5.1**	**8.5**	**2.0**	**0.3**	**1.2**	**0.7**	**18.4**	**1.2%**
Catford town centre stores (zone 7)												
Aldi, Rushey Green, Catford *(in-centre)*	0.0	3.0	0.0	7.4	5.3	0.5	4.4	0.5	0.0	2.5	**23.7**	**1.6%**
Tesco, Catford Centre, Catford *(in-centre)*	0.0	0.7	0.0	1.7	0.8	0.6	7.5	0.0	1.2	0.0	**12.6**	**0.8%**
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0	0.0	0.0	2.0	0.6	1.8	3.0	0.0	0.0	0.0	**7.4**	**0.5%**
Lidl, Catford Island, Catford *(in-centre)*	0.0	0.3	0.0	2.2	1.1	0.6	1.6	0.3	0.0	0.2	**6.3**	**0.4%**
Other stores, Catford	0.0	0.0	0.0	0.0	0.3	0.1	0.9	0.0	0.0	0.0	**1.3**	**0.1%**
Sub-total, Catford town centre stores	**0.0**	**3.9**	**0.0**	**13.4**	**8.2**	**3.7**	**17.4**	**0.8**	**1.2**	**2.7**	**51.3**	**3.4%**
Catford other stores (zone 7)												
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0	0.0	0.0	0.0	2.5	0.8	4.1	0.0	0.2	0.2	**7.7**	**0.5%**
Sub-total, Catford other stores	**0.0**	**0.0**	**0.0**	**0.0**	**2.5**	**0.8**	**4.1**	**0.0**	**0.2**	**0.2**	**7.7**	**0.5%**
Sydenham district centre stores (zone 7)												
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	8.4	0.4	0.0	2.0	**10.7**	**0.7%**
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	**4.0**	**0.3%**
Other stores, Sydenham	0.0	0.0	0.0	0.0	0.0	0.0	7.1	0.0	0.0	1.0	**8.1**	**0.5%**
Sub-total, Sydenham district centre stores	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**19.5**	**0.4**	**0.0**	**2.9**	**22.8**	**1.5%**
Sydenham other stores (zone 7)												
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0	0.6	0.0	2.6	5.1	0.9	65.6	7.0	6.0	7.3	**95.0**	**6.2%**
Sub-total, Sydenham out-of-centre stores	**0.0**	**0.6**	**0.0**	**2.6**	**5.1**	**0.9**	**65.6**	**7.0**	**6.0**	**7.3**	**95.0**	**6.2%**
Forest Hill district centre stores (zone 10)												
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.1	7.8	5.3	0.0	29.8	**43.1**	**2.8%**
Other stores, Forest Hill	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	2.1	**6.0**	**0.4%**
Sub-total, Forest Hill	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**11.7**	**5.3**	**0.0**	**31.9**	**49.1**	**3.2%**
Total for main stores & centres in Lewisham (A)	**32.2**	**74.4**	**77.8**	**111.6**	**69.4**	**15.0**	**151.2**	**17.0**	**8.6**	**55.5**	**612.6**	**40.2%**

Table 5b - Convenience goods spend (£m) 2025 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace outside Lewisham												
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	70.8	14.3	0.0	1.8	0.0	0.0	0.0	0.0	1.0	0.5	**88.4**	**5.8%**
Lidl, Bestwood Street, Bermondsey (zone 1)	9.4	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**11.7**	**0.8%**
Aldi, Old Kent Road, Bermondsey (zone 2)	5.0	17.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**22.9**	**1.5%**
Morrisons, Aylesham Centre, Peckham (zone 2)	1.7	24.4	0.0	0.0	0.0	0.0	1.2	0.0	0.0	2.5	**29.7**	**2.0%**
Waitrose, New Capital Quay, Greenwich (zone 3)	1.4	2.9	4.8	2.6	0.0	0.0	0.0	0.0	0.0	0.0	**11.6**	**0.8%**
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0	0.0	0.0	0.0	3.4	11.0	0.0	0.0	0.0	0.0	**14.3**	**0.9%**
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0	0.0	2.1	0.2	1.7	16.9	0.0	0.0	5.5	0.0	**26.5**	**1.7%**
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.9	15.1	8.1	0.0	**24.2**	**1.6%**
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0	0.0	0.0	0.0	0.3	0.0	0.0	17.2	0.4	0.0	**17.9**	**1.2%**
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.8	0.0	0.7	**11.5**	**0.8%**
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.9	0.0	0.0	**7.9**	**0.5%**
Sainsbury's, High Street, Penge (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.3	28.1	0.0	**31.0**	**2.0%**
Aldi, Croydon Road, Anerley (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.4	19.9	0.2	**22.0**	**1.4%**
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.2	16.5	0.0	**22.8**	**1.5%**
Waitrose, Southend Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	1.0	2.1	3.8	12.8	7.6	3.5	**30.8**	**2.0%**
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	3.7	0.0	1.6	0.0	15.1	0.0	**20.4**	**1.3%**
Tesco, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.8	0.0	0.0	1.3	16.0	0.0	**18.0**	**1.2%**
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0	9.0	0.0	1.8	0.0	0.0	0.0	8.1	0.0	10.5	**29.4**	**1.9%**
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0	9.9	0.0	0.0	0.0	0.0	0.6	2.3	0.0	13.2	**26.0**	**1.7%**
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	**4.8**	**0.3%**
Sub-total, other stores in survey area (B)	**88.2**	**79.7**	**6.9**	**6.3**	**10.9**	**30.0**	**11.3**	**83.4**	**118.1**	**36.8**	**471.7**	**31.0%**
Stores outside survey area												
Asda, Old Kent Road, Southwark	4.8	20.4	0.4	0.2	0.0	0.0	0.8	0.0	0.0	0.3	**26.9**	**1.8%**
Asda, Bugsby Way, Charlton	0.0	0.3	5.7	2.0	7.0	0.0	0.0	0.0	0.0	0.0	**14.9**	**1.0%**
Sainsbury's, Charlton Riverside, Charlton	0.5	0.3	9.2	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**10.4**	**0.7%**
Sainsbury's Local, Fenton Parade, Greenwich	0.0	0.0	11.4	0.0	0.0	0.0	0.0	1.4	0.0	0.0	**12.8**	**0.8%**
Tesco Extra, Streatham High Road, Streatham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.1	0.0	0.0	**8.1**	**0.5%**
Waitrose, Masons Hill, Bromley	0.0	0.0	0.7	0.0	0.0	3.8	0.3	0.6	0.0	0.0	**5.5**	**0.4%**
All other foodstores outside survey area	20.4	12.0	20.7	3.2	17.1	1.2	2.2	52.0	14.7	4.5	**148.0**	**9.7%**
Sub-total, stores outside survey area (C)	**25.8**	**33.0**	**48.0**	**5.4**	**24.6**	**5.0**	**3.2**	**62.1**	**14.7**	**4.8**	**226.6**	**14.9%**
Total for stores outside survey area (B+C)	**114.0**	**112.7**	**54.9**	**11.6**	**35.5**	**35.0**	**14.5**	**145.5**	**132.8**	**41.6**	**698.3**	**45.9%**
Local convenience goods												
Local / other shops in survey area **(D)**	17.2	29.0	22.0	15.0	11.1	17.6	15.5	34.1	37.3	13.1	**211.8**	**13.9%**
Total (A+B+C+D)	**163.4**	**216.2**	**154.8**	**138.3**	**115.9**	**67.6**	**181.2**	**196.5**	**178.7**	**110.2**	**1,522.7**	**100.0%**

Source: Table 3, Table 4

Table 5c - Convenience goods spend (£m) 2030

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace in Lewisham (main stores)												
Deptford district centre stores (zone 1)												
Asda, Deptford High Street *(in-centre)*	1.0	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.4%**
Iceland, Deptford High Street *(in-centre)*	3.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.1**	**0.2%**
Tesco Express, Deptford High Street *(in-centre)*	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.5**	**0.0%**
Other stores, Deptford	9.7	4.9	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**15.1**	**1.0%**
Sub-total, Deptford district centre stores	**13.8**	**10.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**0.0**	**0.0**	**24.5**	**1.6%**
New Cross district centre stores (zone 2)												
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	1.4	24.8	0.0	1.8	0.0	0.0	1.0	0.0	0.0	0.0	**28.8**	**1.8%**
Iceland, New Cross Road, New Cross *(in-centre)*	0.0	5.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.3%**
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	1.3	3.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	**0.3%**
Other stores, New Cross	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.1**	**0.3%**
Sub-total, New Cross district centre stores	**2.7**	**37.7**	**0.0**	**2.0**	**0.0**	**0.0**	**1.0**	**0.0**	**0.0**	**0.0**	**43.4**	**2.8%**
Blackheath district centre stores (zone 3)												
Other stores, Blackheath	0.0	0.0	3.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.2%**
Sub-total, Blackheath district centre stores	**0.0**	**0.0**	**3.2**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.5**	**0.2%**
Blackheath other stores (zone 3)												
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0	0.0	7.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**7.4**	**0.5%**
Sub-total, Blackheath other stores	**0.0**	**0.0**	**7.0**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**7.4**	**0.5%**
Lewisham town centre stores (zone 4)												
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	6.1	12.6	4.9	27.9	5.2	0.0	11.1	0.7	0.0	4.0	**72.6**	**4.6%**
Marks & Spencer, High Street, Lewisham *(in-centre)*	3.0	2.3	5.4	4.0	0.9	0.0	5.5	0.0	0.0	2.9	**24.1**	**1.5%**
Iceland, High Street, Lewisham *(in-centre)*	1.0	0.9	1.9	4.6	0.5	0.0	2.6	0.3	0.0	0.5	**12.4**	**0.8%**
Tesco Express, High Street, Lewisham *(in-centre)*	0.0	0.5	1.1	2.3	0.5	0.0	0.0	0.0	0.0	0.0	**4.3**	**0.3%**
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0	2.4	3.5	4.6	2.7	0.0	0.0	0.0	0.0	0.0	**13.2**	**0.8%**
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	1.2	1.4	0.7	0.0	0.0	0.0	0.0	0.0	**3.4**	**0.2%**
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	0.7	2.8	0.2	0.0	0.0	0.0	0.0	0.0	**3.7**	**0.2%**
Other stores, Lewisham	2.6	2.5	2.5	4.5	1.7	0.1	4.1	0.0	0.0	1.4	**19.4**	**1.2%**
Sub-total, Lewisham town centre stores	**12.7**	**21.1**	**21.2**	**52.2**	**12.4**	**0.1**	**23.3**	**1.1**	**0.0**	**8.9**	**153.1**	**9.7%**
Lewisham other stores (zone 4)												
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	6.2	7.2	6.6	25.5	4.4	0.7	6.0	0.0	0.0	0.4	**57.0**	**3.6%**
Sub-total, Lewisham other stores	**6.2**	**7.2**	**6.6**	**25.5**	**4.4**	**0.7**	**6.0**	**0.0**	**0.0**	**0.4**	**57.0**	**3.6%**

Table 5c - Convenience goods spend (£m) 2030 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Total Available Spend - 2030	**181.0**	**235.5**	**158.2**	**136.3**	**113.9**	**70.8**	**185.6**	**197.8**	**181.0**	**109.7**	**1,569.9**	**100.0**
Lee Green district centre stores (zone 5)												
Sainsbury's, Burnt Ash Road, Lee Green (*in-centre)*	0.0	0.0	40.3	13.7	26.6	0.2	0.0	2.0	0.0	0.5	**83.4**	**5.3%**
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	**1.6**	**0.1%**
Other stores, Lee Green	0.0	0.0	0.8	0.0	2.6	0.0	0.9	0.0	0.0	0.0	**4.3**	**0.3%**
Sub-total, Lee Green district centre stores	**0.0**	**0.0**	**41.1**	**13.7**	**30.8**	**0.2**	**0.9**	**2.0**	**0.0**	**0.5**	**89.3**	**5.7%**
Downham district centre stores (zone 5)												
M&S Simply Food (BP PFS), Bromley Road, Downham	0.2	0.0	0.0	0.0	1.9	5.5	1.2	0.3	1.2	0.7	**10.9**	**0.7%**
Iceland, Bromley Road, Downham	0.0	0.0	0.0	0.0	0.9	1.4	0.9	0.0	0.0	0.0	**3.2**	**0.2%**
Tesco Express, Bromley Road, Downham	0.0	0.0	0.4	0.0	0.9	1.3	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Co-Operative, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.4	0.8	0.0	0.0	0.0	0.0	**2.2**	**0.1%**
Sub-total, Downham district centre stores	**0.2**	**0.0**	**0.4**	**0.0**	**5.0**	**8.9**	**2.1**	**0.3**	**1.2**	**0.7**	**18.8**	**1.2%**
Catford town centre stores (zone 7)												
Aldi, Rushey Green, Catford *(in-centre)*	0.0	3.2	0.0	7.3	5.3	0.5	4.5	0.5	0.0	2.5	**23.9**	**1.5%**
Tesco, Catford Centre, Catford *(in-centre)*	0.0	0.8	0.0	1.7	0.8	0.7	7.7	0.0	1.2	0.0	**12.9**	**0.8%**
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0	0.0	0.0	2.0	0.6	1.9	3.0	0.0	0.0	0.0	**7.5**	**0.5%**
Lidl, Catford Island, Catford *(in-centre)*	0.0	0.3	0.0	2.2	1.1	0.7	1.6	0.3	0.0	0.2	**6.3**	**0.4%**
Other stores, Catford	0.0	0.0	0.0	0.0	0.3	0.1	0.9	0.0	0.0	0.0	**1.4**	**0.1%**
Sub-total, Catford town centre stores	**0.0**	**4.3**	**0.0**	**13.2**	**8.1**	**3.9**	**17.8**	**0.8**	**1.2**	**2.7**	**51.9**	**3.3%**
Catford other stores (zone 7)												
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0	0.0	0.0	0.0	2.4	0.9	4.2	0.0	0.2	0.2	**7.8**	**0.5%**
Sub-total, Catford other stores	**0.0**	**0.0**	**0.0**	**0.0**	**2.4**	**0.9**	**4.2**	**0.0**	**0.2**	**0.2**	**7.8**	**0.5%**
Sydenham district centre stores (zone 7)												
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	8.6	0.4	0.0	1.9	**10.9**	**0.7%**
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.0	0.0	0.0	**4.1**	**0.3%**
Other stores, Sydenham	0.0	0.0	0.0	0.0	0.0	0.0	7.3	0.0	0.0	1.0	**8.2**	**0.5%**
Sub-total, Sydenham district centre stores	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**20.0**	**0.4**	**0.0**	**2.9**	**23.3**	**1.5%**
Sydenham other stores (zone 7)												
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0	0.6	0.0	2.6	5.0	0.9	67.2	7.1	6.1	7.3	**96.7**	**6.2%**
Sub-total, Sydenham out-of-centre stores	**0.0**	**0.6**	**0.0**	**2.6**	**5.0**	**0.9**	**67.2**	**7.1**	**6.1**	**7.3**	**96.7**	**6.2%**
Forest Hill district centre stores (zone 10)												
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.1	8.0	5.4	0.0	29.7	**43.2**	**2.7%**
Other stores, Forest Hill	0.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	2.1	**6.1**	**0.4%**
Sub-total, Forest Hill	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**12.0**	**5.4**	**0.0**	**31.8**	**49.3**	**3.1%**
Total for main stores & centres in Lewisham (A)	**35.6**	**81.1**	**79.5**	**110.0**	**68.2**	**15.7**	**154.9**	**17.1**	**8.7**	**55.3**	**626.0**	**39.9%**

Table 5c - Convenience goods spend (£m) 2030 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace outside Lewisham												
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	78.4	15.6	0.0	1.7	0.0	0.0	0.0	0.0	1.0	0.5	**97.3**	**6.2%**
Lidl, Bestwood Street, Bermondsey (zone 1)	10.4	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**12.9**	**0.8%**
Aldi, Old Kent Road, Bermondsey (zone 2)	5.5	18.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**25.0**	**1.6%**
Morrisons, Aylesham Centre, Peckham (zone 2)	1.9	26.5	0.0	0.0	0.0	0.0	1.2	0.0	0.0	2.5	**32.1**	**2.0%**
Waitrose, New Capital Quay, Greenwich (zone 3)	1.5	3.2	4.9	2.5	0.0	0.0	0.0	0.0	0.0	0.0	**12.1**	**0.8%**
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0	0.0	0.0	0.0	3.3	11.5	0.0	0.0	0.0	0.0	**14.8**	**0.9%**
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0	0.0	2.2	0.2	1.7	17.7	0.0	0.0	5.6	0.0	**27.4**	**1.7%**
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	1.0	15.2	8.2	0.0	**24.4**	**1.6%**
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0	0.0	0.0	0.0	0.3	0.0	0.0	17.3	0.4	0.0	**18.0**	**1.1%**
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.9	0.0	0.7	**11.5**	**0.7%**
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.0	0.0	0.0	**8.0**	**0.5%**
Sainsbury's, High Street, Penge (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.3	28.5	0.0	**31.4**	**2.0%**
Aldi, Croydon Road, Anerley (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.4	20.2	0.2	**22.3**	**1.4%**
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	16.7	0.0	**23.0**	**1.5%**
Waitrose, Southend Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	1.0	2.2	3.9	12.8	7.7	3.5	**31.1**	**2.0%**
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	3.7	0.0	1.7	0.0	15.2	0.0	**20.6**	**1.3%**
Tesco, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.7	0.0	0.0	1.3	16.2	0.0	**18.2**	**1.2%**
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0	9.8	0.0	1.7	0.0	0.0	0.0	8.2	0.0	10.5	**30.2**	**1.9%**
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0	10.8	0.0	0.0	0.0	0.0	0.6	2.3	0.0	13.1	**26.8**	**1.7%**
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	**4.8**	**0.3%**
Sub-total, other stores in survey area (B)	**97.7**	**86.9**	**7.1**	**6.2**	**10.7**	**31.5**	**11.5**	**83.9**	**119.7**	**36.7**	**491.8**	**31.3%**
Stores outside survey area												
Asda, Old Kent Road, Southwark	5.3	22.3	0.4	0.2	0.0	0.0	0.8	0.0	0.0	0.3	**29.3**	**1.9%**
Asda, Bugsby Way, Charlton	0.0	0.3	5.8	1.9	6.8	0.0	0.0	0.0	0.0	0.0	**14.9**	**0.9%**
Sainsbury's, Charlton Riverside, Charlton	0.6	0.3	9.4	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**10.7**	**0.7%**
Sainsbury's Local, Fenton Parade, Greenwich	0.0	0.0	11.7	0.0	0.0	0.0	0.0	1.4	0.0	0.0	**13.1**	**0.8%**
Tesco Extra, Streatham High Road, Streatham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.2	0.0	0.0	**8.2**	**0.5%**
Waitrose, Masons Hill, Bromley	0.0	0.0	0.8	0.0	0.0	4.0	0.3	0.6	0.0	0.0	**5.7**	**0.4%**
All other foodstores outside survey area	22.6	13.1	21.1	3.2	16.8	1.3	2.3	52.3	14.9	4.4	**152.0**	**9.7%**
Sub-total, stores outside survey area (C)	**28.5**	**35.9**	**49.1**	**5.3**	**24.1**	**5.3**	**3.3**	**62.5**	**14.9**	**4.8**	**233.8**	**14.9%**
Total for stores outside survey area (B+C)	**126.3**	**122.8**	**56.2**	**11.5**	**34.8**	**36.7**	**14.9**	**146.4**	**134.5**	**41.4**	**725.6**	**46.2%**
Local convenience goods												
Local / other shops in survey area **(D)**	19.1	31.6	22.5	14.8	10.9	18.4	15.9	34.3	37.8	13.0	**218.3**	**13.9%**
Total (A+B+C+D)	**181.0**	**235.5**	**158.2**	**136.3**	**113.9**	**70.8**	**185.6**	**197.8**	**181.0**	**109.7**	**1,569.9**	**100.0%**

Source: Table 3, Table 4

Table 5d - Convenience goods spend (£m) 2035

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace in Lewisham (main stores)												
Deptford district centre stores (zone 1)												
Asda, Deptford High Street *(in-centre)*	1.0	5.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.3**	**0.4%**
Iceland, Deptford High Street *(in-centre)*	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.3**	**0.2%**
Tesco Express, Deptford High Street *(in-centre)*	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.5**	**0.0%**
Other stores, Deptford	10.4	5.4	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**16.3**	**1.0%**
Sub-total, Deptford district centre stores	**14.8**	**11.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**0.0**	**0.0**	**26.5**	**1.6%**
New Cross district centre stores (zone 2)												
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	1.5	27.1	0.0	1.8	0.0	0.0	1.0	0.0	0.0	0.0	**31.4**	**1.9%**
Iceland, New Cross Road, New Cross *(in-centre)*	0.0	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.4%**
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	1.4	3.9	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**0.3%**
Other stores, New Cross	0.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3%**
Sub-total, New Cross district centre stores	**2.9**	**41.3**	**0.0**	**2.1**	**0.0**	**0.0**	**1.0**	**0.0**	**0.0**	**0.0**	**47.3**	**2.9%**
Blackheath district centre stores (zone 3)												
Other stores, Blackheath	0.0	0.0	3.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	**3.6**	**0.2%**
Sub-total, Blackheath district centre stores	**0.0**	**0.0**	**3.3**	**0.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.6**	**0.2%**
Blackheath other stores (zone 3)												
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0	0.0	7.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**7.6**	**0.5%**
Sub-total, Blackheath other stores	**0.0**	**0.0**	**7.1**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**7.6**	**0.5%**
Lewisham town centre stores (zone 4)												
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	6.6	13.8	5.0	28.9	5.3	0.0	11.4	0.8	0.0	4.0	**75.8**	**4.6%**
Marks & Spencer, High Street, Lewisham *(in-centre)*	3.2	2.5	5.6	4.1	1.0	0.0	5.7	0.0	0.0	3.0	**25.0**	**1.5%**
Iceland, High Street, Lewisham *(in-centre)*	1.1	1.0	2.0	4.8	0.5	0.0	2.7	0.3	0.0	0.5	**12.9**	**0.8%**
Tesco Express, High Street, Lewisham *(in-centre)*	0.0	0.5	1.1	2.4	0.5	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3%**
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0	2.6	3.6	4.8	2.8	0.0	0.0	0.0	0.0	0.0	**13.7**	**0.8%**
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	1.3	1.5	0.7	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.2%**
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	0.7	2.9	0.2	0.0	0.0	0.0	0.0	0.0	**3.8**	**0.2%**
Other stores, Lewisham	2.7	2.8	2.6	4.7	1.7	0.1	4.2	0.0	0.0	1.4	**20.2**	**1.2%**
Sub-total, Lewisham town centre stores	**13.6**	**23.1**	**21.7**	**54.2**	**12.7**	**0.1**	**24.0**	**1.1**	**0.0**	**8.9**	**159.3**	**9.8%**
Lewisham other stores (zone 4)												
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	6.7	7.9	6.7	26.5	4.5	0.7	6.2	0.0	0.0	0.4	**59.5**	**3.6%**
Sub-total, Lewisham other stores	**6.7**	**7.9**	**6.7**	**26.5**	**4.5**	**0.7**	**6.2**	**0.0**	**0.0**	**0.4**	**59.5**	**3.6%**

Table 5d - Convenience goods spend (£m) 2035 - conti

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Total Available Spend - 2035	**194.2**	**258.0**	**161.5**	**141.4**	**116.1**	**73.4**	**190.8**	**201.5**	**186.2**	**110.2**	**1,633.2**	**100.0**
Lee Green district centre stores (zone 5)												
Sainsbury's, Burnt Ash Road, Lee Green (*in-centre)*	0.0	0.0	41.1	14.2	27.1	0.2	0.0	2.1	0.0	0.5	**85.3**	**5.2%**
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.1%**
Other stores, Lee Green	0.0	0.0	0.9	0.0	2.6	0.0	0.9	0.0	0.0	0.0	**4.4**	**0.3%**
Sub-total, Lee Green district centre stores	**0.0**	**0.0**	**42.0**	**14.2**	**31.4**	**0.2**	**0.9**	**2.1**	**0.0**	**0.5**	**91.3**	**5.6%**
Downham district centre stores (zone 5)												
M&S Simply Food (BP PFS), Bromley Road, Downham	0.2	0.0	0.0	0.0	1.9	5.7	1.2	0.3	1.2	0.7	**11.2**	**0.7%**
Iceland, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.0	1.4	0.9	0.0	0.0	0.0	**3.3**	**0.2%**
Tesco Express, Bromley Road, Downham	0.0	0.0	0.4	0.0	0.9	1.3	0.0	0.0	0.0	0.0	**2.6**	**0.2%**
Co-Operative, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.4	0.9	0.0	0.0	0.0	0.0	**2.2**	**0.1%**
Sub-total, Downham district centre stores	**0.2**	**0.0**	**0.4**	**0.0**	**5.1**	**9.2**	**2.1**	**0.3**	**1.2**	**0.7**	**19.3**	**1.2%**
Catford town centre stores (zone 7)												
Aldi, Rushey Green, Catford *(in-centre)*	0.0	3.5	0.0	7.6	5.4	0.6	4.7	0.5	0.0	2.5	**24.7**	**1.5%**
Tesco, Catford Centre, Catford *(in-centre)*	0.0	0.8	0.0	1.8	0.8	0.7	7.9	0.0	1.3	0.0	**13.3**	**0.8%**
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0	0.0	0.0	2.1	0.6	2.0	3.1	0.0	0.0	0.0	**7.8**	**0.5%**
Lidl, Catford Island, Catford *(in-centre)*	0.0	0.3	0.0	2.3	1.1	0.7	1.7	0.3	0.0	0.2	**6.5**	**0.4%**
Other stores, Catford	0.0	0.0	0.0	0.0	0.3	0.1	0.9	0.0	0.0	0.0	**1.4**	**0.1%**
Sub-total, Catford town centre stores	**0.0**	**4.7**	**0.0**	**13.7**	**8.2**	**4.0**	**18.3**	**0.9**	**1.3**	**2.7**	**53.7**	**3.3%**
Catford other stores (zone 7)												
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0	0.0	0.0	0.0	2.5	0.9	4.3	0.0	0.2	0.2	**8.0**	**0.5%**
Sub-total, Catford other stores	**0.0**	**0.0**	**0.0**	**0.0**	**2.5**	**0.9**	**4.3**	**0.0**	**0.2**	**0.2**	**8.0**	**0.5%**
Sydenham district centre stores (zone 7)												
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	8.8	0.4	0.0	2.0	**11.2**	**0.7%**
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	0.0	**4.2**	**0.3%**
Other stores, Sydenham	0.0	0.0	0.0	0.0	0.0	0.0	7.5	0.0	0.0	1.0	**8.5**	**0.5%**
Sub-total, Sydenham district centre stores	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**20.6**	**0.4**	**0.0**	**2.9**	**23.9**	**1.5%**
Sydenham other stores (zone 7)												
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0	0.7	0.0	2.7	5.1	0.9	69.1	7.2	6.2	7.3	**99.2**	**6.1%**
Sub-total, Sydenham out-of-centre stores	**0.0**	**0.7**	**0.0**	**2.7**	**5.1**	**0.9**	**69.1**	**7.2**	**6.2**	**7.3**	**99.2**	**6.1%**
Forest Hill district centre stores (zone 10)												
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.1	8.2	5.5	0.0	29.8	**43.6**	**2.7%**
Other stores, Forest Hill	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.0	0.0	2.1	**6.2**	**0.4%**
Sub-total, Forest Hill	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**12.4**	**5.5**	**0.0**	**31.9**	**49.9**	**3.1%**
Total for main stores & centres in Lewisham (A)	**38.2**	**88.8**	**81.2**	**114.1**	**69.5**	**16.2**	**159.2**	**17.4**	**8.9**	**55.5**	**649.1**	**39.7%**

Table 5d - Convenience goods spend (£m) 2035 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace outside Lewisham												
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	84.2	17.1	0.0	1.8	0.0	0.0	0.0	0.0	1.0	0.5	**104.6**	**6.4%**
Lidl, Bestwood Street, Bermondsey (zone 1)	11.2	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**13.9**	**0.8%**
Aldi, Old Kent Road, Bermondsey (zone 2)	5.9	20.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**27.2**	**1.7%**
Morrisons, Aylesham Centre, Peckham (zone 2)	2.0	29.1	0.0	0.0	0.0	0.0	1.3	0.0	0.0	2.5	**34.8**	**2.1%**
Waitrose, New Capital Quay, Greenwich (zone 3)	1.6	3.5	5.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	**12.7**	**0.8%**
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0	0.0	0.0	0.0	3.4	11.9	0.0	0.0	0.0	0.0	**15.3**	**0.9%**
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0	0.0	2.2	0.2	1.7	18.4	0.0	0.0	5.7	0.0	**28.3**	**1.7%**
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	1.0	15.5	8.5	0.0	**25.0**	**1.5%**
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0	0.0	0.0	0.0	0.3	0.0	0.0	17.6	0.4	0.0	**18.3**	**1.1%**
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.1	0.0	0.7	**11.7**	**0.7%**
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.1	0.0	0.0	**8.1**	**0.5%**
Sainsbury's, High Street, Penge (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.3	29.3	0.0	**32.3**	**2.0%**
Aldi, Croydon Road, Anerley (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.4	20.8	0.2	**22.9**	**1.4%**
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	17.2	0.0	**23.6**	**1.4%**
Waitrose, Southend Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	1.0	2.3	4.0	13.1	7.9	3.5	**31.8**	**1.9%**
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	3.7	0.0	1.7	0.0	15.7	0.0	**21.1**	**1.3%**
Tesco, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.8	0.0	0.0	1.3	16.6	0.0	**18.7**	**1.1%**
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0	10.7	0.0	1.8	0.0	0.0	0.0	8.3	0.0	10.5	**31.4**	**1.9%**
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0	11.8	0.0	0.0	0.0	0.0	0.6	2.4	0.0	13.2	**28.0**	**1.7%**
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	**4.8**	**0.3%**
Sub-total, other stores in survey area (B)	**104.9**	**95.1**	**7.2**	**6.4**	**10.9**	**32.6**	**11.9**	**85.5**	**123.1**	**36.8**	**514.4**	**31.5%**
Stores outside survey area												
Asda, Old Kent Road, Southwark	5.7	24.4	0.4	0.2	0.0	0.0	0.8	0.0	0.0	0.3	**31.8**	**1.9%**
Asda, Bugsby Way, Charlton	0.0	0.3	5.9	2.0	7.0	0.0	0.0	0.0	0.0	0.0	**15.2**	**0.9%**
Sainsbury's, Charlton Riverside, Charlton	0.6	0.3	9.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**11.0**	**0.7%**
Sainsbury's Local, Fenton Parade, Greenwich	0.0	0.0	11.9	0.0	0.0	0.0	0.0	1.4	0.0	0.0	**13.3**	**0.8%**
Tesco Extra, Streatham High Road, Streatham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.3	0.0	0.0	**8.3**	**0.5%**
Waitrose, Masons Hill, Bromley	0.0	0.0	0.8	0.0	0.0	4.2	0.3	0.7	0.0	0.0	**5.9**	**0.4%**
All other foodstores outside survey area	24.3	14.4	21.6	3.3	17.1	1.3	2.3	53.3	15.3	4.5	**157.3**	**9.6%**
Sub-total, stores outside survey area (C)	**30.6**	**39.4**	**50.1**	**5.5**	**24.6**	**5.5**	**3.4**	**63.7**	**15.3**	**4.8**	**242.8**	**14.9%**
Total for stores outside survey area (B+C)	**135.5**	**134.5**	**57.3**	**11.9**	**35.5**	**38.1**	**15.3**	**149.1**	**138.4**	**41.6**	**757.3**	**46.4%**
Local convenience goods												
Local / other shops in survey area **(D)**	20.5	34.6	23.0	15.3	11.1	19.1	16.3	34.9	38.9	13.1	**226.8**	**13.9%**
Total (A+B+C+D)	**194.2**	**258.0**	**161.5**	**141.4**	**116.1**	**73.4**	**190.8**	**201.5**	**186.2**	**110.2**	**1,633.2**	**100.0%**

Source: Table 3, Table 4

Table 5e - Convenience goods spend (£m) 2040

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace in Lewisham (main stores)												
Deptford district centre stores (zone 1)												
Asda, Deptford High Street *(in-centre)*	1.1	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.9**	**0.4%**
Iceland, Deptford High Street *(in-centre)*	3.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.2%**
Tesco Express, Deptford High Street *(in-centre)*	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.6**	**0.0%**
Other stores, Deptford	10.9	6.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**17.4**	**1.0%**
Sub-total, Deptford district centre stores	**15.6**	**12.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**0.0**	**0.0**	**28.4**	**1.7%**
New Cross district centre stores (zone 2)												
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	1.5	29.9	0.0	2.0	0.0	0.0	1.0	0.0	0.0	0.0	**34.5**	**2.0%**
Iceland, New Cross Road, New Cross *(in-centre)*	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.4**	**0.4%**
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	1.5	4.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**6.2**	**0.4%**
Other stores, New Cross	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.3%**
Sub-total, New Cross district centre stores	**3.0**	**45.6**	**0.0**	**2.3**	**0.0**	**0.0**	**1.0**	**0.0**	**0.0**	**0.0**	**52.0**	**3.0%**
Blackheath district centre stores (zone 3)												
Other stores, Blackheath	0.0	0.0	3.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	**3.7**	**0.2%**
Sub-total, Blackheath district centre stores	**0.0**	**0.0**	**3.3**	**0.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.7**	**0.2%**
Blackheath other stores (zone 3)												
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	0.0	0.0	7.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**7.7**	**0.4%**
Sub-total, Blackheath other stores	**0.0**	**0.0**	**7.1**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**7.7**	**0.4%**
Lewisham town centre stores (zone 4)												
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	6.9	15.2	5.1	30.9	5.5	0.0	11.9	0.8	0.0	4.1	**80.3**	**4.7%**
Marks & Spencer, High Street, Lewisham *(in-centre)*	3.4	2.7	5.6	4.4	1.0	0.0	5.9	0.0	0.0	3.0	**26.0**	**1.5%**
Iceland, High Street, Lewisham *(in-centre)*	1.1	1.1	2.0	5.1	0.6	0.0	2.8	0.3	0.0	0.5	**13.5**	**0.8%**
Tesco Express, High Street, Lewisham *(in-centre)*	0.0	0.6	1.1	2.6	0.5	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.3%**
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	0.0	2.9	3.6	5.1	2.9	0.0	0.0	0.0	0.0	0.0	**14.4**	**0.8%**
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	1.3	1.6	0.7	0.0	0.0	0.0	0.0	0.0	**3.6**	**0.2%**
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	0.0	0.0	0.7	3.1	0.2	0.0	0.0	0.0	0.0	0.0	**4.0**	**0.2%**
Other stores, Lewisham	2.9	3.0	2.6	5.0	1.8	0.1	4.4	0.0	0.0	1.4	**21.2**	**1.2%**
Sub-total, Lewisham town centre stores	**14.3**	**25.5**	**21.8**	**57.9**	**13.0**	**0.1**	**24.9**	**1.1**	**0.0**	**9.1**	**167.7**	**9.8%**
Lewisham other stores (zone 4)												
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	7.0	8.7	6.8	28.3	4.6	0.7	6.4	0.0	0.0	0.4	**62.9**	**3.7%**
Sub-total, Lewisham other stores	**7.0**	**8.7**	**6.8**	**28.3**	**4.6**	**0.7**	**6.4**	**0.0**	**0.0**	**0.4**	**62.9**	**3.7%**

Table 5e - Convenience goods spend (£m) 2040 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Total Available Spend - 2040	**204.1**	**284.8**	**162.4**	**151.1**	**119.3**	**75.4**	**198.5**	**207.1**	**190.3**	**111.9**	**1,704.9**	**100.0**
Lee Green district centre stores (zone 5)												
Sainsbury's, Burnt Ash Road, Lee Green (*in-centre)*	0.0	0.0	41.4	15.1	27.9	0.3	0.0	2.1	0.0	0.5	**87.3**	**5.1%**
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.1%**
Other stores, Lee Green	0.0	0.0	0.9	0.0	2.7	0.0	1.0	0.0	0.0	0.0	**4.5**	**0.3%**
Sub-total, Lee Green district centre stores	**0.0**	**0.0**	**42.2**	**15.1**	**32.3**	**0.3**	**1.0**	**2.1**	**0.0**	**0.5**	**93.5**	**5.5%**
Downham district centre stores (zone 5)												
M&S Simply Food (BP PFS), Bromley Road, Downham	0.2	0.0	0.0	0.0	2.0	5.8	1.2	0.3	1.2	0.7	**11.5**	**0.7%**
Iceland, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.0	1.5	1.0	0.0	0.0	0.0	**3.4**	**0.2%**
Tesco Express, Bromley Road, Downham	0.0	0.0	0.4	0.0	0.9	1.3	0.0	0.0	0.0	0.0	**2.6**	**0.2%**
Co-Operative, Bromley Road, Downham	0.0	0.0	0.0	0.0	1.4	0.9	0.0	0.0	0.0	0.0	**2.3**	**0.1%**
Sub-total, Downham district centre stores	**0.2**	**0.0**	**0.4**	**0.0**	**5.3**	**9.5**	**2.2**	**0.3**	**1.2**	**0.7**	**19.8**	**1.2%**
Catford town centre stores (zone 7)												
Aldi, Rushey Green, Catford *(in-centre)*	0.0	3.9	0.0	8.1	5.5	0.6	4.8	0.5	0.0	2.6	**26.0**	**1.5%**
Tesco, Catford Centre, Catford *(in-centre)*	0.0	0.9	0.0	1.9	0.8	0.7	8.2	0.0	1.3	0.0	**13.9**	**0.8%**
Tesco Express, Rushey Green, Catford *(in-centre)*	0.0	0.0	0.0	2.2	0.6	2.0	3.2	0.0	0.0	0.0	**8.1**	**0.5%**
Lidl, Catford Island, Catford *(in-centre)*	0.0	0.3	0.0	2.4	1.1	0.7	1.7	0.3	0.0	0.2	**6.8**	**0.4%**
Other stores, Catford	0.0	0.0	0.0	0.0	0.3	0.1	1.0	0.0	0.0	0.0	**1.4**	**0.1%**
Sub-total, Catford town centre stores	**0.0**	**5.2**	**0.0**	**14.7**	**8.4**	**4.1**	**19.0**	**0.9**	**1.3**	**2.7**	**56.3**	**3.3%**
Catford other stores (zone 7)												
Lidl, Southend Road, Bellingham *(out-of-centre)*	0.0	0.0	0.0	0.0	2.5	0.9	4.5	0.0	0.2	0.2	**8.3**	**0.5%**
Sub-total, Catford other stores	**0.0**	**0.0**	**0.0**	**0.0**	**2.5**	**0.9**	**4.5**	**0.0**	**0.2**	**0.2**	**8.3**	**0.5%**
Sydenham district centre stores (zone 7)												
Lidl, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.4	0.0	2.0	**11.6**	**0.7%**
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.0	4.4	0.0	0.0	0.0	**4.4**	**0.3%**
Other stores, Sydenham	0.0	0.0	0.0	0.0	0.0	0.0	7.8	0.0	0.0	1.0	**8.8**	**0.5%**
Sub-total, Sydenham district centre stores	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**21.4**	**0.4**	**0.0**	**3.0**	**24.8**	**1.5%**
Sydenham other stores (zone 7)												
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	0.0	0.7	0.0	2.8	5.3	1.0	71.9	7.4	6.4	7.4	**102.9**	**6.0%**
Sub-total, Sydenham out-of-centre stores	**0.0**	**0.7**	**0.0**	**2.8**	**5.3**	**1.0**	**71.9**	**7.4**	**6.4**	**7.4**	**102.9**	**6.0%**
Forest Hill district centre stores (zone 10)												
Sainsbury's, London Road, Forest Hill *(in-centre)*	0.0	0.0	0.0	0.0	0.0	0.1	8.6	5.6	0.0	30.3	**44.6**	**2.6%**
Other stores, Forest Hill	0.0	0.0	0.0	0.0	0.0	0.0	4.3	0.0	0.0	2.2	**6.4**	**0.4%**
Sub-total, Forest Hill	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**12.9**	**5.6**	**0.0**	**32.4**	**51.0**	**3.0%**
Total for main stores & centres in Lewisham (A)	**40.2**	**98.1**	**81.6**	**121.9**	**71.4**	**16.7**	**165.6**	**17.9**	**9.1**	**56.4**	**679.0**	**39.8%**

Table 5e - Convenience goods spend (£m) 2040 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Total (£m)	Total (%)
Convenience goods floorspace outside Lewisham												
Tesco Extra, Surrey Quays Centre, Rotherhithe (zone 1)	88.5	18.9	0.0	1.9	0.0	0.0	0.0	0.0	1.1	0.5	**110.8**	**6.5%**
Lidl, Bestwood Street, Bermondsey (zone 1)	11.7	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**14.7**	**0.9%**
Aldi, Old Kent Road, Bermondsey (zone 2)	6.2	22.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**29.6**	**1.7%**
Morrisons, Aylesham Centre, Peckham (zone 2)	2.1	32.1	0.0	0.0	0.0	0.0	1.3	0.0	0.0	2.5	**38.1**	**2.2%**
Waitrose, New Capital Quay, Greenwich (zone 3)	1.7	3.8	5.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	**13.3**	**0.8%**
Waitrose, Burnt Ash Lane, Grove Park, Bromley (zone 5)	0.0	0.0	0.0	0.0	3.5	12.2	0.0	0.0	0.0	0.0	**15.7**	**0.9%**
Sainsbury's, Walters Yard, Bromley (zone 6)	0.0	0.0	2.3	0.2	1.8	18.9	0.0	0.0	5.8	0.0	**29.0**	**1.7%**
Sainsbury's, Westow Street, Crystal Palace (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	1.0	16.0	8.6	0.0	**25.6**	**1.5%**
Sainsbury's, Streatham High Road, Streatham Common (zone 8)	0.0	0.0	0.0	0.0	0.3	0.0	0.0	18.1	0.4	0.0	**18.8**	**1.1%**
Tesco Express, Croxted Road, Dulwich (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.4	0.0	0.7	**12.1**	**0.7%**
Co-Operative, Norwood Road, West Norwood (zone 8)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.3	0.0	0.0	**8.3**	**0.5%**
Sainsbury's, High Street, Penge (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.3	29.9	0.0	**33.0**	**1.9%**
Aldi, Croydon Road, Anerley (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.4	21.2	0.2	**23.4**	**1.4%**
Sainsbury's, Whitehorse Lane, Selhurst (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6	17.6	0.0	**24.2**	**1.4%**
Waitrose, Southend Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	1.0	2.4	4.2	13.4	8.1	3.5	**32.7**	**1.9%**
Tesco Express, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	3.8	0.0	1.8	0.0	16.0	0.0	**21.6**	**1.3%**
Tesco, Croydon Road, Beckenham (zone 9)	0.0	0.0	0.0	0.0	0.8	0.0	0.0	1.3	17.0	0.0	**19.1**	**1.1%**
Sainsbury's, Dog Kennel Hill, East Dulwich (zone 10)	0.0	11.8	0.0	1.9	0.0	0.0	0.0	8.5	0.0	10.7	**33.0**	**1.9%**
Sainsbury's Local, Lordship Lane, East Dulwich (zone 10)	0.0	13.0	0.0	0.0	0.0	0.0	0.7	2.4	0.0	13.4	**29.5**	**1.7%**
Co-Operative, Lordship Lane, East Dulwich (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	**4.9**	**0.3%**
Sub-total, other stores in survey area (B)	**110.2**	**105.0**	**7.3**	**6.9**	**11.2**	**33.5**	**12.4**	**87.9**	**125.8**	**37.4**	**537.5**	**31.5%**
Stores outside survey area												
Asda, Old Kent Road, Southwark	6.0	26.9	0.4	0.2	0.0	0.0	0.8	0.0	0.0	0.3	**34.7**	**2.0%**
Asda, Bugsby Way, Charlton	0.0	0.3	6.0	2.1	7.2	0.0	0.0	0.0	0.0	0.0	**15.6**	**0.9%**
Sainsbury's, Charlton Riverside, Charlton	0.7	0.3	9.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**11.1**	**0.7%**
Sainsbury's Local, Fenton Parade, Greenwich	0.0	0.0	12.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	**13.4**	**0.8%**
Tesco Extra, Streatham High Road, Streatham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.5	0.0	0.0	**8.5**	**0.5%**
Waitrose, Masons Hill, Bromley	0.0	0.0	0.8	0.0	0.0	4.3	0.3	0.7	0.0	0.0	**6.0**	**0.4%**
All other foodstores outside survey area	25.5	15.9	21.7	3.5	17.6	1.4	2.4	54.8	15.6	4.5	**162.9**	**9.6%**
Sub-total, stores outside survey area (C)	**32.2**	**43.5**	**50.4**	**5.9**	**25.3**	**5.6**	**3.5**	**65.4**	**15.6**	**4.9**	**252.3**	**14.8%**
Total for stores outside survey area (B+C)	**142.4**	**148.5**	**57.7**	**12.7**	**36.5**	**39.1**	**15.9**	**153.3**	**141.4**	**42.3**	**789.8**	**46.3%**
Local convenience goods												
Local / other shops in survey area **(D)**	21.5	38.2	23.1	16.4	11.4	19.6	17.0	35.9	39.7	13.3	**236.1**	**13.8%**
Total (A+B+C+D)	**204.1**	**284.8**	**162.4**	**151.1**	**119.3**	**75.4**	**198.5**	**207.1**	**190.3**	**111.9**	**1,704.9**	**100.0%**

Source: Table 3, Table 4

Table 6 - Trading performance of existing convenience floorspace

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2020 (£m)	Est. Actual Turnover 2020 (£m) (Table 5a)	Inflow (%)	Inflow (£m)	Actual t/over including inflow (£m)	)ifference from Avg Turnover 2020 (£m)
Deptford district centre stores (zone 1)										
Asda, Deptford High Street *(in-centre)*	446	95%	423	17,272	7.3	4.9	0%	0.0	4.9	-2.5
Iceland, Deptford High Street *(in-centre)*	457	97%	444	7,157	3.2	2.5	0%	0.0	2.5	-0.6
Tesco Express, Deptford High Street *(in-centre)*	371	95%	352	12,924	4.6	0.4	0%	0.0	0.4	-4.2
Other stores, Deptford	4,527	100%	4,527	6,000	27.2	12.5	0%	0.0	12.5	-14.7
Sub-total, Deptford district centre stores	**5,801**	**-**	**5,747**	**-**	**42.2**	**20.3**	**-**	**0.0**	**20.3**	**-21.9**
New Cross district centre stores (zone 2)										
Sainsbury's, New Cross Gate Retail Park, New Cross *(in-centre)*	3,539	72%	2,555	12,203	31.2	24.6	5%	1.3	25.9	-5.2
Iceland, New Cross Road, New Cross *(in-centre)*	441	97%	428	7,157	3.1	4.5	0%	0.0	4.5	1.4
Sainsbury's Local, Lewisham Way, New Cross *(in-centre)*	343	95%	326	12,203	4.0	4.4	0%	0.0	4.4	0.4
Other stores, New Cross	1,576	100%	1,576	6,000	9.5	3.4	0%	0.0	3.4	-6.0
Sub-total, New Cross district centre stores	**5,899**	-	**4,885**	-	**47.7**	**36.9**	-	**1.3**	**38.2**	**-9.4**
Blackheath district centre stores (zone 3)										
Other stores, Blackheath	1,211	100%	1,211	6,000	7.3	3.4	0%	0.0	3.4	-3.9
Sub-total, Blackheath district centre stores	**1,211**	**-**	**1,211**	**-**	**7.3**	**3.4**	**-**	**0.0**	**3.4**	**-3.9**
Blackheath other stores (zone 3)										
M&S Simply Food, Stratheden Parade, Blackheath *(out-of-centre)*	661	85%	562	10,976	6.2	7.1	0%	0.0	7.1	1.0
Sub-total, Blackheath other stores	**661**	**-**	**562**	**-**	**6.2**	**7.1**	**-**	**0.0**	**7.1**	**1.0**
Lewisham town centre stores (zone 4)										
Sainsbury's, Lewisham Centre, Lewisham *(in-centre)*	2,223	80%	1,778	12,203	21.7	68.2	0%	0.0	68.2	46.5
Marks & Spencer, High Street, Lewisham *(in-centre)*	1,006	85%	855	10,976	9.4	22.7	0%	0.0	22.7	13.3
Iceland, High Street, Lewisham *(in-centre)*	315	97%	306	7,157	2.2	11.9	0%	0.0	11.9	9.7
Tesco Express, High Street, Lewisham *(in-centre)*	378	95%	359	12,924	4.6	4.2	0%	0.0	4.2	-0.5
Lidl, Lee High Road, Lewisham *(edge-of-centre)*	1,040	80%	832	7,105	5.9	12.4	0%	0.0	12.4	6.5
Sainsbury's Local, Loampit Vale, Lewisham *(edge-of-centre)*	300	95%	285	12,203	3.5	3.3	0%	0.0	3.3	-0.2
Tesco Express, Loampit Vale, Lewisham *(edge-of-centre)*	120	95%	114	12,924	1.5	3.6	0%	0.0	3.6	2.1
Other stores, Lewisham	3,897	100%	3,897	6,000	23.4	18.1	5%	1.0	19.0	-4.3
Sub-total, Lewisham town centre stores	**9,279**	**-**	**8,427**	**-**	**72.2**	**144.3**	**-**	**1.0**	**145.3**	**73.1**
Lewisham other stores (zone 4)										
Tesco, Lewisham Road, Lewisham *(out-of-centre)*	3,310	80%	2,648	12,924	34.2	53.6	10%	6.0	59.5	25.3
Sub-total, Lewisham other stores	**3,310**	**-**	**2,648**		**34.2**	**53.6**	**-**	**6.0**	**59.5**	**25.3**

TABLE 6 (CONTINUED) | TRADING PERFORMANCE OF EXISTING FLOORSPACE

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2015 (£m)	Actual Turnover 2015 (£m) (Table 5a)	Inflow (%)	Inflow (£m)	Actual t/over including inflow (£m)	Difference from Avg Turnover 2015 (£m)
Lee Green district centre stores (zone 5)										
Sainsbury's, Burnt Ash Road, Lee Green (*in-centre)*	3,616	80%	2,893	12,203	35.3	79.9	5%	4.2	84.1	48.8
Iceland, Leegate Shopping Centre, Lee Green *(in-centre)*	451	97%	438	7,157	3.1	1.5	0%	0.0	1.5	-1.6
Other stores, Lee Green	274	100%	274	6,000	1.6	4.1	0%	0.0	4.1	2.4
Sub-total, Lee Green district centre stores	**4,341**	**-**	**3,605**	**-**	**40.1**	**85.5**	**-**	**4.2**	**89.8**	**49.7**
Downham district centre stores (zone 5)										
M&S Simply Food (BP PFS), Bromley Road, Downham	78	95%	74	10,976	0.8	10.1	0%	0.0	10.1	9.2
Iceland, Bromley Road, Downham	280	97%	272	7,157	1.9	3.0	0%	0.0	3.0	1.0
Tesco Express, Bromley Road, Downham	209	95%	199	12,924	2.6	2.3	0%	0.0	2.3	-0.3
Co-Operative, Bromley Road, Downham	443	95%	421	8,277	3.5	2.0	0%	0.0	2.0	-1.5
Sub-total, Downham district centre stores	**1,010**	**-**	**965**	**-**	**8.8**	**17.3**	**-**	**0.0**	**17.3**	**8.5**
Catford town centre stores (zone 7)										
Aldi, Rushey Green, Catford *(in-centre)*	650	76%	494	9,939	4.9	22.8	0%	0.0	22.8	17.9
Tesco, Catford Centre, Catford *(in-centre)*	2,944	75%	2,208	12,924	28.5	12.3	5%	0.6	12.9	-15.6
Tesco Express, Rushey Green, Catford *(in-centre)*	301	95%	286	12,924	3.7	7.1	5%	0.4	7.5	3.8
Lidl, Catford Island, Catford *(in-centre)*	712	80%	570	7,105	4.0	6.0	5%	0.3	6.3	2.3
Other stores, Catford	2,548	100%	2,548	6,000	15.3	1.3	0%	0.0	1.3	-14.0
Sub-total, Catford town centre stores	**7,155**	**-**	**6,106**	-	**56.5**	**49.5**	**-**	**1.3**	**50.9**	**-5.6**
Catford other stores (zone 7)										
Lidl, Southend Road, Bellingham *(out-of-centre)*	712	80%	570	7,105	4.0	7.4	0%	0.0	7.4	3.4
Sub-total, Catford other stores	**712**	**-**	**570**		**4.0**	**7.4**	**-**	**0.0**	**7.4**	**3.4**
Sydenham district centre stores (zone 7)										
Lidl, Sydenham Road, Sydenham *(in-centre)*	675	80%	540	7,105	3.8	10.6	0%	0.0	10.6	6.8
Co-Operative, Sydenham Road, Sydenham *(in-centre)*	603	87%	526	8,277	4.4	4.0	0%	0.0	4.0	-0.4
Other stores, Sydenham	2,576	100%	2,576	6,000	15.5	8.0	0%	0.0	8.0	-7.5
Sub-total, Sydenham district centre stores	**3,854**	**-**	**3,643**	**21,382**	**23.7**	**22.6**	**-**	**0.0**	**22.6**	**-1.0**
Sydenham other stores (zone 7)										
Sainsbury's, Bell Green, Sydenham *(out-of-centre)*	8,099	60%	4,859	12,203	59.3	93.5	5%	4.9	98.5	39.2
Sub-total, Sydenham out-of-centre stores	**8,099**	**-**	**4,859**		**59.3**	**93.5**	**-**	**4.9**	**98.5**	**39.2**
Forest Hill district centre stores (zone 10)										
Sainsbury's, London Road, Forest Hill *(in-centre)*	2,142	80%	1,714	12,203	20.9	43.1	0%	0.0	43.1	22.2
Other stores, Forest Hill	1,027	100%	1,027	6,000	6.2	6.0	0%	0.0	6.0	-0.2
Sub-total, Forest Hill	**3,169**	**-**	**2,740**	**-**	**27.1**	**49.1**	**-**	**0.0**	**49.1**	**22.0**

Table 7 - Commitments for new convenience goods retail floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated convenience A1 floorspace (%)	Estimated convenience A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2020	Estimated turnover 2025	Estimated turnover 2030	Estimated turnover 2035	Estimated turnover 2040	See note
Lewisham Gateway, Lewisham town centre	DC/18/105218	7,725	6180	20%	1,236	7,000	8.7	8.8	8.8	8.8	8.8	1
Asda, Thurston Road, Lewisham		-	-	-	1,046	17,272	18.1	18.4	18.4	18.4	18.4	2
Carpetright site, Lewisham town centre	DC/17/102049	960	768	30%	230	6,000	1.4	1.4	1.4	1.4	1.4	3
New Bermondsey / Surrey Canal Triangle	DC/11/076357	3,000	2400	50%	1,200	6,000	7.2	7.3	7.3	7.3	7.3	4
Convoys Wharf, Deptford	DC/13/83358	5,810	4648	50%	2,324	6,000	13.9	14.2	14.2	14.2	14.2	5
Oxestalls Road, Deptford	DC/15/092295	10,413	8330.4	20%	1,666	6,000	10.0	10.2	10.2	10.2	10.2	6
Leegate Centre, Lee Green d/centre	DC/14/090032	1,588	1270.4	40%	508	6,000	3.0	3.1	3.1	3.1	3.1	7
Foodstore, Leegate Centre	DC/14/090032	3,847	3077.6	67%	2,062	17,272	35.6	36.3	36.3	36.3	36.3	8
Total	**-**	**-**	**-**	**-**	**-**	**-**	**97.9**	**99.8**	**99.8**	**99.8**	**99.8**	

Notes to turnover assumptions

Note 1 - Total proposed floorspace reflects revised scheme submitted under application DC/18/105218, combined total for Phase 1 and Phase 2. Flexible consent A1-A4 uses granted, assumed 50% of approved floorspace will be A1 comparison, 25% will be A1 convenience, and balance will be A3/A4 uses.

Note 2 - Store is now trading but was not at time of 2015 household survey, so retained as commitment.

Note 3 - Flexible consent granted for A1, A2, A3, B1, D1 use. Assumed that 30% will be A1 comparison, 30% A1 convenience and balance will be A3/B1/D1 uses.

Note 4 - Flexible consent granted for up to 3,000 sq.m (gross) A1/A2 use. Assumed that 50% will be A1 comparison, 50% will be A1 convenience.

Note 5 - Flexible consent granted for A1 and A2 use. Assumed that 50% of approved floorspace will be for A1 comparison floorspace and 50% for A1 convenience goods floorspace.

Note 6 - Flexible consent granted for A1-A5, B1, D1 and D2 uses. Owing to the wide range of approved uses, we have assumed 20% will come forward for A1 comparison floorspace, 20% for A1 convenience floorspace, and the balance for A3/ A4/ A5/ B1/ D1 and D2 use.

Note 7 - Flexible consent granted for A1, A2 and A3 use (excluding foodstore, see Note 8). Assumed 40% will be A1 comparison, 40% will be A1 convenience, 20% A2/A3.

Note 8 - non-food floorspace within foodstore assumed at 33% of total net sales area (company average for intended occupier, Asda)

Sales density of 0.7% applied 2019-20, 0.4% 2020-21 and 0.2% per annum applied 2021-25, no sales density growth applied thereafter (source: Experian Retail Planner 16, Figure 4a)

Table 8 - Borough-wide convenience goods floorspace capacity

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Residents Spending in LB Lewisham (£m)	590.7	612.6	626.0	*649.1*	*679.0*
Existing Shop Floorspace within LB Lewisham (sq.m net)	45,967	45,967	45,967	*45,967*	*45,967*
Sales per sq.m net £	12,851	9,336	9,373	*9,373*	*9,373*
Sales from existing floorspace (£m)	590.7	429.1	430.9	*430.9*	*430.9*
Sales from committed floorspace (£m)	0.0	99.8	99.8	*99.8*	*99.8*
Residual spending to support new convenience goods floorspace (£m)	0.0	83.7	95.4	*118.5*	*148.3*
Sales per sq.m net in new shops (£) *Based on large store format*	12,000	12,315	12,315	*12,315*	*12,315*
Capacity for new floorspace (sq.m net)	**0**	**6,821**	**7,747**	***9,623***	***12,045***
Capacity for new floorspace (sq.m net, rounded)	**0**	**6,800**	**7,700**	***9,600***	***12,000***

Sales density of 0.7% applied 2019-20, 0.4% 2020-21 and 0.2% per annum applied 2021-25, no sales density growth applied thereafter (source: Experian Retail Planner 16, Figure 4a)

Appendix 3
Comparison goods scenario testing (Scenarios A and B)

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 1a - Lewisham town centre floorspace capacity - SCENARIO A

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	2,017.3	2,397.2	2,860.5	*3,458.7*	*4,200.2*
Market Share from Survey Area (%)	15	15	15	*15*	*16*
Comparison goods spending in Lewisham town centre (£m)	304.7	364.9	436.7	*533.3*	*658.0*
Total comparison goods spending (£m)	**304.7**	**364.9**	**436.7**	***533.3***	***658.0***
Existing Retail Floorspace (sq.m net)	28,277	28,277	28,277	*28,277*	*28,277*
Sales per sqm net (£)	10,774	12,333	13,818	*15,482*	*17,346*
Sales from Existing Floorspace (£m)	304.7	348.7	390.7	*437.8*	*490.5*
Sales from Committed Floorspace (£m)	0.0	31.5	35.3	*39.6*	*44.4*
Residual Spending to support new floorspace (£000)	0.0	-15.4	10.7	*55.9*	*123.1*
Sales per sq m net in new shops (£)*	7,500	8,585	9,619	*10,777*	*12,075*
Capacity for new floorspace (sqm net)	**0**	**-1,798**	**1,108**	***5,190***	***10,195***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-1,800**	**1,100**	***5,200***	***10,200***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 1b - Catford town centre floorspace capacity - SCENARIO A

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	2,017.3	2,397.2	2,860.5	*3,458.7*	*4,200.2*
Market Share from Survey Area (%)	2	2	2	*2*	*2*
Comparison goods spending in Catford town centre (£m)	37.9	45.1	53.1	*63.7*	*77.4*
Total comparison goods spending (£m)	**37.9**	**45.1**	**53.1**	***63.7***	***77.4***
Existing Retail Floorspace (sq.m net)	12,361	12,361	12,361	*12,361*	*12,361*
Sales per sqm net (£)	3,067	3,511	3,934	*4,407*	*4,938*
Sales from Existing Floorspace (£m)	37.9	43.4	48.6	*54.5*	*61.0*
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	*0.0*	*0.0*
Residual Spending to support new floorspace (£000)	0.0	1.7	4.5	*9.3*	*16.4*
Sales per sq m net in new shops (£)*	6,000	6,868	7,695	*8,622*	*9,660*
Capacity for new floorspace (sqm net)	**0**	**241**	**579**	***1,075***	***1,694***
Capacity for new floorspace (sq.m net, rounded)	**0**	**200**	**600**	***1,100***	***1,700***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 1c - District centres floorspace capacity - SCENARIO A

	2020	2025	2030	*Long-term needs - indicative* ***2035***	***2040***
Total Available Expenditure (£m)	2,017.3	2,397.2	2,860.5	*3,458.7*	*4,200.2*
Market Share from Survey Area (%)	6	6	6	*6*	*6*
Comparison goods spending in district centres (£m)	113.7	134.3	160.4	*193.7*	*235.7*
Total comparison goods spending (£m)	**113.7**	**134.3**	**160.4**	***193.7***	***235.7***
Existing Retail Floorspace (sq.m net)	22,850	22,850	22,850	*22,850*	*22,850*
Sales per sqm net (£)	4,975	5,695	6,380	*7,149*	*8,009*
Sales from Existing Floorspace (£m)	113.7	130.1	145.8	*163.3*	*183.0*
Sales from Committed Floorspace (£m)	0.0	12.2	13.6	*15.3*	*17.1*
Residual Spending to support new floorspace (£000)	0.0	-8.0	1.0	*15.1*	*35.5*
Sales per sq m net in new shops (£)*	6,000	6,868	7,695	8,622	9,660
Capacity for new floorspace (sqm net)	**0**	**-1,162**	**126**	***1,748***	***3,677***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-1,200**	**100**	***1,700***	***3,700***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 1d - Out-of-centre floorspace capacity - SCENARIO A

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	2,017.3	2,397.2	2,860.5	*3,458.7*	*4,200.2*
Market Share from Survey Area (%)	5	5	5	*5*	*5*
Comparison goods spending in out-of-centre locations (£m)	98.3	115.9	135.9	*162.7*	*196.8*
Total comparison goods spending (£m)	**98.3**	**115.9**	**135.9**	***162.7***	***196.8***
Existing Retail Floorspace (sq.m net)	29,737	29,737	29,737	*29,737*	*29,737*
Sales per sqm net (£)	3,306	3,785	4,241	*4,751*	*5,323*
Sales from Existing Floorspace (£m)	98.3	112.6	126.1	*141.3*	*158.3*
Sales from Committed Floorspace (£m)	0.0	24.8	27.8	*31.1*	*34.8*
Residual Spending to support new floorspace (£000)	0.0	-21.5	-17.9	*-9.7*	*3.7*
Sales per sq m net in new shops (£)	6,000	6,868	7,695	8,622	9,660
Capacity for new floorspace (sqm net)	**0**	**-3,127**	**-2,331**	***-1,129***	***378***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-3,100**	**-2,300**	***-1,100***	***400***

**Assumes growth in sales efficiency as follows - 2020-21 2.5% / 2021-25 2.8% per annum / 2025 onwards 2.3% per annum*

Table 2 - Total comparison goods floorspace capacity - SCENARIO A

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
8a. Lewisham town centre capacity	0	-1,798	1,108	5,190	10,195
8b. Catford town centre capacity	0	241	579	1,075	1,694
8c. District centres capacity (combined)	0	-1,162	126	1,748	3,677
8d. Out-of-centre capacity	0	-3,127	-2,331	-1,129	378
Capacity for new floorspace (sqm net)	**0**	**-5,845**	**-518**	**6,883**	**15,944**
Capacity for new floorspace (sq.m net, rounded)	**0**	**-5,800**	**-500**	***6,900***	***15,900***

Table 3a - Lewisham town centre floorspace capacity - SCENARIO B

	2020	2025	2030	*Long-term needs - indicative* *2035*	*2040*
Total Available Expenditure (£m)	1,988.4	2,261.8	2,698.9	*3,263.3*	*3,963.0*
Market Share from Survey Area (%)	15	15	15	*15*	*16*
Comparison goods spending in Lewisham town centre (£m)	300.3	344.2	412.1	*503.2*	*620.8*
Total comparison goods spending (£m)	**300.3**	**344.2**	**412.1**	***503.2***	***620.8***
Existing Retail Floorspace (sq.m net)	28,277	28,277	28,277	*28,277*	*28,277*
Sales per sqm net (£)	10,620	11,836	13,261	*14,858*	*16,647*
Sales from Existing Floorspace (£m)	300.3	334.7	375.0	*420.2*	*470.7*
Sales from Committed Floorspace (£m)	0.0	29.5	33.0	*37.0*	*41.4*
Residual Spending to support new floorspace (£000)	0.0	-19.9	4.1	*46.1*	*108.6*
Sales per sq m net in new shops (£)*	7,500	8,359	9,365	*10,493*	*11,757*
Capacity for new floorspace (sqm net)	**0**	**-2,382**	**435**	***4,390***	***9,240***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-2,400**	**400**	***4,400***	***9,200***

**Assumes growth in sales efficiency as follows - 2020-21 2.0% / 2021-25 2.24% per annum / 2025 onwards 2.3% per annum*

Table 3b - Catford town centre floorspace capacity - SCENARIO B

	2020	2025	2030	*Long-term needs - indicative* *2035*	*2040*
Total Available Expenditure (£m)	1,988.4	2,261.8	2,698.9	*3,263.3*	*3,963.0*
Market Share from Survey Area (%)	2	2	2	*2*	*2*
Comparison goods spending in Catford town centre (£m)	37.4	42.5	50.1	*60.1*	*73.0*
Total comparison goods spending (£m)	**37.4**	**42.5**	**50.1**	***60.1***	***73.0***
Existing Retail Floorspace (sq.m net)	12,361	12,361	12,361	*12,361*	*12,361*
Sales per sqm net (£)	3,023	3,370	3,775	*4,230*	*4,739*
Sales from Existing Floorspace (£m)	37.4	41.7	46.7	*52.3*	*58.6*
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	*0.0*	*0.0*
Residual Spending to support new floorspace (£000)	0.0	0.9	3.4	*7.9*	*14.5*
Sales per sq m net in new shops (£)*	6,000	6,687	7,492	*8,394*	*9,405*
Capacity for new floorspace (sqm net)	**0**	**129**	**456**	***936***	***1,537***
Capacity for new floorspace (sq.m net, rounded)	**0**	**100**	**500**	***900***	***1,500***

**Assumes growth in sales efficiency as follows - 2020-21 2.0% / 2021-25 2.24% per annum / 2025 onwards 2.3% per annum*

Table 3c - District centres floorspace capacity - SCENARIO B

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
Total Available Expenditure (£m)	1,988.4	2,261.8	2,698.9	*3,263.3*	*3,963.0*
Market Share from Survey Area (%)	6	6	6	*6*	*6*
Comparison goods spending in district centres (£m)	112.0	126.7	151.3	*182.8*	*222.3*
Total comparison goods spending (£m)	**112.0**	**126.7**	**151.3**	***182.8***	***222.3***
Existing Retail Floorspace (sq.m net)	22,850	22,850	22,850	*22,850*	*22,850*
Sales per sqm net (£)	4,904	5,465	6,123	*6,861*	*7,687*
Sales from Existing Floorspace (£m)	112.0	124.9	139.9	*156.8*	*175.6*
Sales from Committed Floorspace (£m)	0.0	11.4	12.7	*14.3*	*16.0*
Residual Spending to support new floorspace (£000)	0.0	-9.5	-1.3	*11.7*	*30.7*
Sales per sq m net in new shops (£)*	6,000	6,687	7,492	8,394	9,405
Capacity for new floorspace (sqm net)	**0**	**-1,423**	**-176**	***1,396***	***3,265***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-1,400**	**-200**	***1,400***	***3,300***

**Assumes growth in sales efficiency as follows - 2020-21 2.0% / 2021-25 2.24% per annum / 2025 onwards 2.3% per annum*

Lewisham Council - Retail Capacity Study, 2019 Update | Comparison capacity modelling

Table 3d - Out-of-centre floorspace capacity - SCENARIO B

	2020	2025	2030	*Long-term needs - indicative* *2035*	*2040*
Total Available Expenditure (£m)	1,988.4	2,261.8	2,698.9	*3,263.3*	*3,963.0*
Market Share from Survey Area (%)	5	5	5	*5*	*5*
Comparison goods spending in out-of-centre locations (£m)	96.9	109.3	128.2	*153.5*	*185.7*
Total comparison goods spending (£m)	**96.9**	**109.3**	**128.2**	***153.5***	***185.7***
Existing Retail Floorspace (sq.m net)	29,737	29,737	29,737	*29,737*	*29,737*
Sales per sqm net (£)	3,259	3,632	4,070	*4,560*	*5,109*
Sales from Existing Floorspace (£m)	96.9	108.0	121.0	*135.6*	*151.9*
Sales from Committed Floorspace (£m)	0.0	23.1	25.9	*29.0*	*32.5*
Residual Spending to support new floorspace (£000)	0.0	-21.8	-18.7	*-11.2*	*1.2*
Sales per sq m net in new shops (£)	6,000	6,687	7,492	8,394	9,405
Capacity for new floorspace (sqm net)	**0**	**-3,267**	**-2,496**	***-1,331***	***129***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-3,300**	**-2,500**	***-1,300***	***100***

**Assumes growth in sales efficiency as follows - 2020-21 2.0% / 2021-25 2.24% per annum / 2025 onwards 2.3% per annum*

Table 4 - Total comparison goods floorspace capacity - SCENARIO B

				Long-term needs - indicative	
	2020	**2025**	**2030**	***2035***	***2040***
8a. Lewisham town centre capacity	0	-2,382	435	4,390	9,240
8b. Catford town centre capacity	0	129	456	936	1,537
8c. District centres capacity (combined)	0	-1,423	-176	1,396	3,265
8d. Out-of-centre capacity	0	-3,267	-2,496	-1,331	129
Capacity for new floorspace (sqm net)	**0**	**-6,944**	**-1,781**	**5,391**	**14,172**
Capacity for new floorspace (sq.m net, rounded)	**0**	**-6,900**	**-1,800**	***5,400***	***14,200***

Appendix 4
Convenience goods scenario testing (Scenario A only)

Table 1 - Borough-wide convenience goods floorspace capacity - SCENARIO A

				Long-term needs - indicative	
	2018	**2023**	**2028**	***2033***	***2038***
Residents Spending in LB Lewisham (£m)	571.6	588.7	601.5	*623.7*	*652.3*
Existing Shop Floorspace within LB Lewisham (sq.m net)	45,967	45,967	45,967	*45,967*	*45,967*
Sales per sq.m net £	12,435	9,336	9,373	*9,373*	*9,373*
Sales from existing floorspace (£m)	571.6	429.1	430.9	*430.9*	*430.9*
Sales from committed floorspace (£m)	0.0	99.8	99.8	*99.8*	*99.8*
Residual spending to support new convenience goods floorspace (£m)	0.0	59.8	70.9	*93.0*	*121.6*
Sales per sq.m net in new shops (£) *Based on large store format*	12,000	12,315	12,315	*12,315*	*12,315*
Capacity for new floorspace (sq.m net)	**0**	**4,876**	**5,757**	***7,553***	***9,877***
Capacity for new floorspace (sq.m net, rounded)	**0**	**4,900**	**5,800**	***7,600***	***9,900***

Sales density of 0.7% applied 2019-20, 0.4% 2020-21 and 0.2% per annum applied 2021-25, no sales density growth applied thereafter (source: Experian Retail Planner 16, Figure 4a)

Appendix 5
Update to 2017 Study recommendations

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
Borough-wide recommendations		
LB1	'The Council should ensure that the core retail functions of the town and district centres are protected and in some cases enhanced. Active uses on ground floor frontages should be encouraged throughout primary and secondary locations, ensuring contiguous frontages and avoiding changes of use which break up the run of facades.'	The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b).
LB2	[Recommendation LB2 confirms the amount of need which the Council should plan for over its Local Plan period]	The Update Study has refreshed the quantitative need figures which the Borough should plan for and therefore the figures shown in Recommendation LB2 should be replaced within those identified in the Update Study.
LB3	'Ensure a sufficient supply of suitable sites to meet the full extent of need outlined in recommendation LB2. It is important that the need for floorspace is not compromised by limited site availability.'	No change to recommendation.
LB4	'The identification of sites to meet retail and leisure floorspace need should be subject to the sequential test and, in accordance with the approach set out in the NPPF, London Plan and Council's adopted Core Strategy, directed towards existing town and district centre locations in the first instance, followed by appropriate and well-connected edge of centre sites.'	No change to recommendation.
LB5	'The impact assessment threshold for new proposals, as set out in the Council's Development Management Local Plan (2014), should be reduced from 1,000 sq.m to 500 sq.m. This will help protect the network of town centres from inappropriate edge and out-of-centre retail and leisure development, ensuring the local authority retains the greatest level of control during the decision making process.'	No change to recommendation.
LB6	'It is advised that figures towards the end of the Plan period (i.e. beyond 2026) are considered as indicative, and subject to review and update throughout the Plan period. Key inputs into the 'need' assessment, including population, expenditure growth rates and levels of 'special forms of trading' will invariably change according to economic fluctuations. In parallel, shopping and leisure patterns continue to evolve as new development is brought forward across the wider sub-region in competing centres.'	The Update Study has set out quantitative need over a revised timescale of 2020 to 2040, reflecting the intended period of the Council's new Local Plan. It is advised that figures set out in the Update Study beyond a ten year interval period (i.e. beyond 2030) are considered indicative and subject to review and update throughout the Plan period.
LB7	'The Council's policy framework has effectively protected and enhanced the primary shopping area in recent years, and we recommend the proactive consideration of legislative controls to prevent such a change of use where considered inappropriate and harmful to the vitality and viability of the shopping frontage – i.e. the dilution of A1 uses underpinning footfall and connectivity across a centre. This recommendation is applicable to centres at all levels of	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
	the retail hierarchy in the Borough. Consideration should be given to the use of Article 4 directions to assist in the protection of primary shopping frontages.'	frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Given the proposed changes in Use Classes Order (merging class A1, A2 and A3 into a single use class) and proposed changes in permitted development (e.g. allowing change of use from A1 to B1/C3 under permitted development), the Council should regularly monitor changes of use realised through permitted development and the Prior Approval proves, and consider introducing an Article 4 Direction covering relevant areas of Lewisham town centre should it wish to support this recommendation through policy.
Table 11.1	[Sets out recommended adjustments to primary and secondary shopping frontages in each of the Borough's centres]	The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Urban Shape have not undertaken any site visits to the Borough's centres as part of the Update Study to provide any further assessment of the suitability of existing defined frontages or reappraisal of the changes recommended in the 2017 Study,
Lewisham town centre recommendations		
LTC1	'Continue to support and facilitate appropriate growth and development on central town centre sites in order to retain 'Major Town Centre' status and to improve on the attraction of the retail and commercial leisure offer. This will in turn lead to an improved market share, a wider more extensive catchment area and an improved frequency of visit'	No change to recommendation.
LTC2	Monitor and benchmark the role of Lewisham Town Centre in respect of catchment, scale and the GLA 'retail hierarchy classification criteria', at regular intervals. Aspire to grow and exceed Major Town Centre thresholds whilst recognising and aspiring to exceed all or some of those thresholds at Metropolitan Centre level'	The Draft London Plan (2018) identifies Lewisham town centre's 'future potential' classification as a Metropolitan Town Centre. The upgrading of Lewisham to a Metropolitan Centre over the lifetime of the new London Plan / Local Plan period should therefore be identified as a key policy objective. As stated in LTC2, regular monitoring of the town centre's progress Metropolitan Centre thresholds should be undertaken.
LTC3	'The core function of Lewisham town centre as a comparison goods shopping destination should be protected through robust frontage policies. It underpins the wider vitality and viability of the centre and creates the 'critical mass' key to driving footfall and visitor numbers. Such an approach will ensure it is able to withstand the potential increased attractiveness of	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
	nearby destinations which compete for market share, most notably Croydon, Bromley and potentially Canada Water.'	within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b).
LTC4	'Consistent with London Plan expectations and the Core Strategy policy framework, Lewisham town centre should be the primary focus for accommodating the identified comparison goods capacity requirements for the Borough. This study has identified a total borough-wide comparison goods requirement of up to 35,600 sq.m net at 2033, including a requirement of between 13,300 sq.m net and 18,000 sq.m net at 2033 for Lewisham town centre based on current shopping patterns/market share (the range of figures depending on whether the Lewisham Gateway application is granted planning permission).'	Amount of floorspace which Lewisham town centre should accommodate should be amended to reflect findings of Update Study. Lewisham Gateway has now been granted planning permission and is under construction.
LTC5	'The identified comparison goods capacity requirements for Lewisham town centre (13,300 sq.m net to 18,000 sq.m net at 2033) can be accommodated within the identified policy priority areas. If a sufficient supply of suitable sites are not available in the rest of the borough's town centres to meet the remaining borough-wide need which this study has identified, there is also capacity for some of this to be accommodated instead within the Lewisham Policy Areas.'	We have not undertaken a revised assessment of the capacity of Lewisham town centre to accommodate the needs identified in the Update Study, but it is recommended that such an exercise is undertaken by the Council as part of the formulation of its Local Plan policies.
LTC6	'The Council should continue to work with developers and operators to introduce a cinema facility into the Lewisham town centre in the short-to-medium term, to stem the loss of market share to facilities outside the Borough, primarily at Canada Water, Greenwich and Beckenham.'	No change to recommendation. It is understood that a cinema facility could come forward as part of Phase 2 of the approved Lewisham Gateway permission.
LTC7	'Development of other complementary commercial leisure uses (such as bars, restaurants and so on) allied to a new cinema should be encouraged in order to increase the length of time which visitors spend in the centre, and allow the centre to have a greater role and function outside of retail trading hours.'	No change to recommendation.
LTC8	'A need has been identified for an improved bowling facility, to replace the dated and poor quality MFA facility. This could potentially take the form of 'boutique bowling' destination in order to differentiate from the offer at Surrey Quays. These are particularly popular, offering a retro style, high end environment with associated karaoke rooms, bars and restaurants. It should be noted that in planning terms the Council can only control the use, but it would be possible to actively market the site and facilitate the introduction of a 'boutique bowling' facility.'	No change to recommendation. Scope should be explored for complementary leisure facilities alongside the proposed cinema in the approved Lewisham Gateway Phase 2 scheme.
LTC9	'There is scope for additional smaller format convenience goods floorspace in Lewisham town centre (indicatively in the region of 1,000-1,500 sq m net), over and above the Asda store being brought forward at Loampit Vale. We recommend that this additional floorspace be directed towards the southern side of the town centre (i.e. on Lewisham High Street) in order to assist in encouraging footfall in this part of the centre. If, however, it is brought forward earlier within the Lewisham Gateway development, we do not consider	No change to recommendation.

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
	there would be further need elsewhere including in the southern side of the town centre.'	
LTC10	'Applications for new development outside the defined frontages in the centre (the Primary Shopping Area) would need to have regard to the sequential and impact tests set out at paragraph 24 and 26 of the NPPF.'	Applications for new development outside the defined frontages in the centre (the Primary Shopping Area) would need to have regard to the sequential and impact tests set out at paragraph 86 to 90 of the NPPF (2019).
LTC11	'The Council should continue to invest in improving the public realm and visual appearance of the town centre. The recent Glass Mill Leisure Centre and new residential developments along Loampit Vale have introduced high-quality public realm into the town centre, and we would expect the Lewisham Gateway development will, once completed, introduce a similar high quality street environment. There is a need for this to be extended throughout the rest of the town centre in order to provide the centre with a coherent feel, rather than 'old versus new', and to assist in navigability and wayfinding.	No change to recommendation.
LTC12	Investment is also needed in improving the visual appearance of shop fronts along Lee High Road, many of which are poor quality and in need of replacement.'	No change to recommendation.
LTC13	'The Council should seek to secure improvements to the Lewisham Centre in the short-to-medium term. The centre appears to have benefited from relatively limited investment in recent years and, although the centre is well laid out and contains a number of reasonable sized units, its visual appearance is somewhat functional, particularly when compared to the investment which is currently being made in competing centres such as Bromley.'	No change to recommendation.
LTC14	'Formulate policy to resist the loss of larger units through sub-division within the Primary Shopping Frontage; and facilitate the creation of larger units - through amalgamation, for example (in instances where an application is required) – in order to encourage the representation of key anchor retailers and footfall drivers.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b).
LTC15	'There is potential for the area around the Lee High Road / Marischal Road junction to be developed and promoted as a small 'independent quarter'. Where funds are available this initiative should be supported by investment in the upgrading of shop fronts and paving, the introduction of planting, support for temporary/meanwhile uses, and so on. This will help to differentiate the area from the national multiple-focussed Lewisham High Street / Lewisham Centre.'	No change to recommendation.
LTC16	'Continued support to innovative uses of space elsewhere in the town centre, such as the Model Market, in order to help generate additional footfall outside of retail hours and attract new visitors into the area.'	No change to recommendation.
LTC17	'The Council should review the defined primary and secondary shopping frontages in Lewisham town centre,	Please see comments regarding Table 11.1 above.

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
	in line with the recommendations set out at Table 11.1 of this study.'	
Catford town centre recommendations		
CTC1	The Council should continue to promote Catford as a higher-order centre in the Borough. It is recommended that the Council retain Catford as a 'Major Centre'.	No change to recommendation.
CTC2	The Council should plan for the development of up to 2,600 sq.m net additional comparison goods floorspace in Catford. The retail 'need' does not arise until post-2026, but in order to help facilitate the regeneration of the town centre, this requirement should be delivered within the early stages of the Council's new Local Plan period. We would expect that the development of this floorspace would form part of the redevelopment of the Catford Centre, which is the major opportunity site in the centre (see below). Two main development opportunities are identified; these provide a sufficient supply of suitable sites to meet the full extent of comparison goods need identified (2,600 sq.m net by 2033), and could also absorb residual borough-wide need, should this not be accommodated within the Lewisham Town Centre Policy Areas. The opportunity sites are: - The Catford Centre; - The Plassy Road Island Site.	The Council should plan for up to 600 sq.m net additional comparison goods floorspace in Catford town centre up to 2030, increasing indicatively to 1,700 sq.m net additional floorspace by 2040. No other changes to recommendation.
CTC3	'The level of need identified should not deter a higher level of growth in order to support the regeneration of Catford town centre. Improved comparison goods shopping provision can be used to increase market share, which would in turn support additional comparison goods floorspace over and above the 'baseline' need identified.'	No change to recommendation.
CTC4	'Facilitate the redevelopment or, at minimum, extensive refurbishment and reconfiguration of the Catford Centre. The inclusion of a foodstore should be retained as part of any redevelopment, albeit at a smaller scale to balance the identified supply/demand. The remaining space should provide for a mix of local comparison and service retailing. A sufficient range of unit sizes should be provided, and a comprehensive upgrade to the environmental quality of the centre be delivered.'	No change to recommendation.
CTC5	'In the medium to longer term, the redevelopment of the Plassy Road Island site represents a significant opportunity for the Council to remodel existing floorspace and accommodate additional comparison goods floorspace, should it seek to plan for an uplift in Catford town centre's comparison goods market share.'	Plassy Island continues to offer an important opportunity to accommodate additional retail floorspace in the medium to longer term. Reflecting the approach in the Draft London Plan, the low density nature of this site coupled with its close proximity to the prime shopping area in Catford town centre means it presents a suitable opportunity for mixed-use/residential-led intensification, which ideally should continue to accommodate an element of retail floorspace at ground floor level given the positive comparison goods need identified for Catford town centre in the Update Study (see CTC2)
CTC6	Support the introduction of complementary commercial leisure facilities such as cafes, bars and restaurants, in	No change to recommendation.

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
	order to increase dwell time, encourage footfall and contribute to an evening economy where possible. There is scope for the recently-pedestrianised Catford Broadway to act as a hub for this type of use, given its close proximity to the Theatre and public transport interchanges.	
CTC7	Across the town centre, and subject to funding, the Council should invest in the public realm to improve the overall environmental quality of the centre, and continue to work alongside Transport for London to improve pedestrian movement around the centre, including enhanced crossing facilities. The extent to which this is deliverable will ultimately depend on TfL's long term aspirations for the routing of the South Circular through the centre.	No change to recommendation. The South Circular re-routing works have been signposted as a strategic priority in the Draft London Plan, presenting a significant opportunity for the transformation of the environmental quality of the town centre to come forward.
CTC8	'The Council should review the defined primary and secondary shopping frontages in Catford town centre, in line with the recommendations set out at Table 11.1 of this study'	Please see comments regarding Table 11.1 above.
Blackheath district centre recommendations		
BDC1	'Continue to support the vitality and viability of the district centre consistent with its role and function, and having regard to the highly constrained nature of the centre. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.'	No change to recommendation.
BDC2	'Continue to support the cafes, bars and restaurants sector which makes an important contribution to the vitality and viability of the centre. Further provision of this nature should only be supported in secondary areas of the centre thereby protecting the Primary Shopping Frontage from any further loss of class A1 floorspace.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Given the proposed changes in Use Classes Order (merging class A1, A2 and A3 into a single use class) and proposed changes in permitted development (e.g. allowing change of use from A1 to B1/C3 under permitted development), the Council should regularly monitor changes of use realised through permitted development and the Prior Approval proves, and consider introducing an Article 4 Direction covering relevant areas of Blackheath district centre should it wish to support this recommendation through policy.
BDC3	'Future opportunities to introduce new convenience goods floorspace in and on the edge of the centre (strongly connected/integrated), either through change of use or new development, should be supported in principle.'	No change to recommendation.

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
BDC4	'The quality of the centre's environment is good and indeed its 'village' character is an important contributor to its overall vitality and viability. The Council should seek to maintain and support this.'	No change to recommendation.
	'The Council should review the defined primary and secondary shopping frontages in Blackheath district centre, in line with the recommendations set out at Table 11.1 of this study.'	Please see comments regarding Table 11.1 above.
Deptford district centre recommendations		
DFDC1	'Do not plan for the development of significant additional commercial floorspace within the centre. Applications which seek to improve/enhance existing floorspace within the centre should be supported in principle.'	No change to recommendation.
DFDC2	'The Council should continue to support Deptford's role as a creative and artistic hub, building on the recent investment the Council has made in the centre in this respect. Applications for further development / enhancement of these uses should be supported in principle.'	No change to recommendation.
DFDC3	'Applications for the development of other 'main town centre uses' should be supported in principle providing they will make a positive contribution to the vitality and viability of the centre, and be of a scale appropriate to the role and function of the centre.'	No change to recommendation.
DFDC4	'Deptford market plays an important role in supporting the vitality and viability of the centre and the Council should continue to support and where possible improve this.'	No change to recommendation.
DFDC5	'The environmental quality of the centre has improved following investment from the Council but there is a need for further 'smartening up' of the centre, particularly in relation to the appearance of shop fronts in the centre.'	No change to recommendation.
DFDC6	'The Council should review the defined primary and secondary shopping frontages in Deptford district centre, in line with the recommendations set out at Table 11.1 of this study. We do not consider there to be a need for the Council to allocate primary shopping frontage in the centre.'	Please see comments regarding Table 11.1 above.
Downham district centre recommendations		
DMDC1	'Downham has a more limited role and function than the other district centres in the Borough, but meets day-to-day convenience goods, services and some comparison goods shopping needs, and the Council should continue to support the vitality and viability of the centre.'	No change to recommendation.
DMDC2	'We do not consider there to be a need to plan for the development of additional comparison or convenience goods retail floorspace within the centre.'	No change to recommendation.
DMDC3	'Applications which seek to improve/enhance existing floorspace within the centre should be supported in principle where they will make a positive contribution to the vitality and viability of the centre, providing they are of a scale appropriate to the role and function of the centre.'	No change to recommendation.
DMDC4	'Downham is the smallest of all the Council's district centres and the loss of units to non-town centre uses (such as residential) should be resisted.'	No change to recommendation. The protection of the number of units in retail / town centre use in Downham district centre is considered

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
		necessary in order to enable the centre to offer a sufficiently diverse range of uses that day to day/local shopping needs are being sustainably met.
DMDC5	'The Council should seek to deliver improvements to the environmental quality of the centre, to improve its physical appearance and upgrade the public realm from its current relatively functional level. Improvements to the quality of shopfronts and appearance of units throughout the centre should be encouraged and supported.'	No change to recommendation.
DMDC6	'The Council should review the defined primary and secondary shopping frontages in Downham district centre, in line with the recommendations set out at Table 11.1 of this study.'	Please see comments regarding Table 11.1 above.
Forest Hill district centre recommendations		
FHDC1	'Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.'	No change to recommendation.
FHDC2	'The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Given the proposed changes in Use Classes Order (merging class A1, A2 and A3 into a single use class) and proposed changes in permitted development (e.g. allowing change of use from A1 to B1/C3 under permitted development), the Council should regularly monitor changes of use realised through permitted development and the Prior Approval proves, and consider introducing an Article 4 Direction covering relevant areas of Forest Hill district centre should it wish to support this recommendation through policy.
FHDC3	'There are opportunity sites outside the primary shopping frontage which should, if redeveloped, incorporate retail or other A-class uses (except class A5) on the ground floor. In particular, it is considered that the Portakabin site (Waldram Crescent) and the site at the junction of Waldram Place/Perry Vale (adjacent to the rear of Forest Hill rail station) both offer opportunities for mixed use, higher density development.'	The Portakabin site's location away from the wider retail / other A-class uses offer in the centre means that, when considered in light of the reduced retail need which the Update Study has identified and the policies in the Draft London Plan, this site could come forward for intensification without retail / other A-class uses at ground floor level. No other changes to recommendation.

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
FHDC4	'There is a need for the Council to invest in improving the public realm and navigability of the centre, particularly in respect of the quality of paving and wayfinding.	No change to recommendation.
	The Council should work with Transport for London to investigate options for improving pedestrian crossing facilities at the London Road / Dartmouth Road / Devonshire Road junction, in order to enhance pedestrian movements around the centre.'	No change to recommendation.
FHDC5	'The Council should work with J D Wetherspoon to secure the positive reuse of the Capitol site which is currently being offered for disposal by the company. A need for a small independent/boutique cinema has been identified for Forest Hill, and this site offers a potential opportunity. It's reuse as a small independent/boutique cinema, community theatre, or similar commercial leisure activity, which would diversify uses in the centre and offer improved accessibility to facilities of this nature for residents living in the south of the Borough. If this site does not come forward, the Council should seek a small scale boutique cinema operator elsewhere in the town centre.'	No change to recommendation. The opening of a new cinema in Crystal Palace / Upper Norwood town centre may potentially have reduced operator demand for the area.
FHDC6	'The Council should continue to support the initiatives and ambitions of the SEE3 Portas Pilot team. Events, such as Forest Hill Fashion Week and open studios events in the artists' workshops along Havelock Walk help to drive footfall and broaden the appeal of the centre, and should continue to be supported.'	No change to recommendation.
FHDC7	'The Council should review the defined primary and secondary shopping frontages in Forest Hill district centre, in line with the recommendations set out at Table 11.1 of this study.'	Please see comments regarding Table 11.1 above.
Lee Green district centre recommendations		
LGDC1	'Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre. '	No change to recommendation.
LGDC2	'The Council should support aspirations to deliver an improved Leegate Centre, including the provision of a new foodstore.'	No change to recommendation.
LGDC3	'The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Given the proposed changes in Use Classes Order (merging class A1, A2 and A3 into a single use class) and proposed changes in permitted

2017 Study ref	2017 Study Recommendation	2019 Update – Urban Shape comments
		development (e.g. allowing change of use from A1 to B1/C3 under permitted development), the Council should regularly monitor changes of use realised through permitted development and the Prior Approval proves, and consider introducing an Article 4 Direction covering relevant areas of Lee Green district centre should it wish to support this recommendation through policy.
LGDC4	'There is a need to improve the environmental quality of the centre, in addition to the improvements proposed by the Leegate Centre. The quality of public realm and outdoors space is generally weak, and shopfronts are of poor quality.'	No change to recommendation.
LGDC5	'The Council should review the defined primary and secondary shopping frontages in Lee Green district centre, in line with the recommendations set out at Table 11.1 of this study.'	Please see comments regarding Table 11.1 above.
New Cross / New Cross Gate district centre recommendations		
NCDC1	'Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre. We do not consider there to be qualitative need to plan for any additional large-format foodstore provision within the centre.'	The Sainsbury's store in the district centre is the subject of potential redevelopment (see NCDC3). Any redevelopment of the site should incorporate a foodstore capable of meeting local residents' main/bulk food shopping needs, as the existing Sainsbury's store plays a role in serving the food shopping needs of the New Cross / Deptford areas.
NCDC2	'Commercial leisure uses make an important contribution to the vitality and viability of the centre and should be continued to be supported to appropriate levels, whilst ensuring the retail function of the centre is not undermined.'	No change to recommendation.
NCDC3	'In the medium to longer term, we consider there is an opportunity to redevelop and reconfigure the New Cross Gate Retail Park site in order for it to make a greater contribution to the vitality and viability of the district centre. The potential extension and introduction of the Bakerloo line should be monitored and might alter recommendations for New Cross as set out in this study.'	The intensification of New Cross Gate Retail Park is supported through the Draft London Plan (2018) as a low density site located close to public transport facilities. The Bakerloo Line extension to New Cross Gate is also confirmed in the Draft London Plan. The Council has published the New Cross Area Framework and Station Opportunity Study, which includes consideration of the Hatcham Works site and its immediate surrounds, along with the wider district centre area and opportunities associated with the proposed Bakerloo Line extension. A separate developer-led public consultation has recently taken place on the redevelopment of the New Cross Gate Retail Park site. As stated in recommendation NCDC1, any redevelopment of the site should incorporate a foodstore capable of meeting local residents' main/bulk food shopping needs, as the existing Sainsbury's store plays a role in serving the food shopping needs of the New Cross / Deptford areas.

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		It is not considered there is a requirement to plan for the retention of the other retail warehouse units (currently occupied by Dreams / TK Maxx) as part of any redevelopment of the site.
NCDC4	'There is currently no primary shopping frontage identified for New Cross / New Cross Gate and we consider this remains a robust approach given the wide variety of uses in the centre. The Council should give consideration to allocating New Cross Gate as secondary shopping frontage in line with the recommendations set out at Table 11.1 of this study.'	Please see comments regarding Table 11.1 above.
NCDC5	'The Council should consider a strategy to enhancing the physical appearance of the district centre, which should explore options for improving pedestrian movement through the centre, introducing enhancements to public realm where possible, and improvements to the physical appearance of the centre, particularly in respect of enhancements to shopfronts.'	No change to recommendation.
Sydenham district centre recommendations		
SDC1	'Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.'	No change to recommendation.
SDC2	'There is scope for additional commercial floorspace to be provided on the ground floor as part of the mixed-use redevelopment of the Marshall Audi site (allocated site). This is centrally-located within the centre, and is therefore a sequentially preferable location (adjacent to the eastern edge of the primary shopping frontage). We would recommend that the site is used to provide class A1 comparison or convenience goods floorspace at ground floor level. to enhance the provision of cafes and restaurants in the centre should be supported, as there is a qualitative gap in provision of this nature at present. However, such uses should be restricted to secondary frontages in the centre, in order to protect the core retail function of the primary shopping frontage.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b).
SDC5*	'The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should therefore be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.'	No change to recommendation. The NPPF (2019) removes the requirement for local planning authorities to define primary and secondary shopping frontages in their centres. However, it is our view that these remain a robust and helpful policy tool in ensuring that that a critical mass of retail activity is retained within centres, and therefore the Council may wish to continue with the allocation of these frontages in addition to defining town centre boundaries and primary shopping areas (as required by NPPF para 85b). Given the proposed changes in Use Classes Order (merging class A1, A2 and A3 into a single use class) and proposed changes in permitted development (e.g. allowing change of use from A1 to B1/C3 under permitted development), the

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		Council should regularly monitor changes of use realised through permitted development and the Prior Approval proves, and consider introducing an Article 4 Direction covering relevant areas of Sydenham district centre should it wish to support this recommendation through policy.
SDC6	'Sydenham has benefited from Portas Pilot funding (and additional funding from Lewisham Council) to support the development of pop-up/temporary shops in the centre and the introduction of markets, and the work of SEE3 and similar initiatives which assist in encouraging new footfall and broadening the diversity of uses in the centre should continue to be encouraged.'	No change to recommendation.
SDC7	'The environmental quality of the district centre is generally good at the present time but this should be monitored and continued investment should be made in the centre throughout the Plan period, should funding be available.'	No change to recommendation.
SDC8	'We do not recommend any changes to the defined primary and secondary frontages in Sydenham district centre.'	Please see comments regarding Table 11.1 above.

**note – there were no recommendations numbered SDC3 or SDC4 in the 2017 Study.*