

London Borough of Lewisham

Catford Retail and Economic Impact Assessment

Final Report for Consultation



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EXECUTIVE SUMMARY

1. Roger Tym & Partners (RTP), part of Peter Brett Associates LLP (PBA) was appointed in June 2012 to undertake a retail and economic impact assessment of Catford town centre for London Borough of Lewisham (LBL). The primary objectives of the study are:
 - To assess the economic impacts of the regeneration proposals;
 - To provide policy recommendations for inclusion in the Local Plan;
 - To meet the requirements of the NPPF (particularly paragraphs 23 and 161);
 - To provide the robust, credible and up to date evidence to support the development of the Catford Town Centre Local Plan;
 - To assist in the formulation of a strategy for mitigating the identified impacts during the regeneration period;
 - To withstand any scrutiny at the Examination into the Local Plan.

Economic and retail context

2. National economic trends are challenging town centres; smaller centres lacking a distinctive offer, such as Catford, are likely to see a further deterioration in their performance without a strong policy intervention. These trends were put into sharp focus by the Portas Review and the supporting research has provided a number of themes, including improving the built form, distinctiveness, application of 'town centre first' planning policy, town centre management and alternative business models. These national trends and themes have set the scene for our recommendations on what can be achieved in Catford.

Planning policy context

3. The NPPF provides a high level policy context for planning policy for Catford, setting out the evidence base requirements for town centre uses and encouraging local authorities to meet its needs in full. This is particularly relevant for Catford, given the need to maximise central opportunities for town centre development.
4. The London Plan and Core Strategy identify Catford as a Major Centre and recognise the regeneration opportunities in the town centre. The draft Catford AAP from 2007 provides a number of commendable aims and aspirations, including the key development sites. These still have merit, but given the prevailing economic context, the challenge presented for the latest iteration for this Plan will be to provide deliverable options and both short term and long term objectives to maintain and enhance the vitality and viability of Catford town centre.

Existing evidence base

5. The existing retail evidence on Lewisham found that there was capacity for both convenience and comparison floorspace in Catford. The capacity for convenience floorspace was across the Borough as a whole; however Catford was one of the preferred locations for this floorspace. Whilst there was not much additional capacity for comparison floorspace across the Borough as a whole, there was found to be a significant amount of

capacity available in Catford. The capacity identified for the comparison goods is post 2014. This evidence is supplemented in subsequent sections of this report.

Engaging businesses in Catford

6. The business survey undertaken for the study indicates that Catford town centre has a high proportion of small independent retail businesses. In terms of perceptions of Catford, most of the aspects of Catford were rated as satisfactory to quite poor; suggesting that businesses think Catford could be significantly improved. Notably the environment of Catford was perceived negatively and improving the appearance of the centre was the most commonly cited answer when the respondents were asked about the most important things to address when planning for the future of Catford. Reducing crime, increasing car parking and improving the number of national retailers were also common answers.

Catford town centre

7. Catford town centre currently has a weak comparison (non-food) offer. There are very few GOAD key attractors located in the centre, and there are also no listed retail requirements from comparison retailers. The centre's MHE ranking has also declined since 2003 and 2004, and is much lower than other Major Centres located in South London.
8. The majority of the retail units in the centre are small and fail to meet the needs of national retailers who want more space. There are also too many small units that are failing to meet the current demand for larger units.
9. The environment of the centre is also poor in places, with unattractive buildings and shop frontages. The heavy traffic running through the centre also has a detrimental impact on the environment of the centre and the busy roads make the centre quite difficult to navigate which detracts from a good retail circuit. Solutions to these issues are being explored with TfL as part of the regeneration programme.
10. While Catford town centre has the potential for positive change, as of today it is:
 - Weakening as a comparison centre;
 - Weakening in relation to peer or competing centres;
 - Dominated by too small units (historical) causing a failure to meet potential demand from multiple retailers;
 - Suffering from the impact of through traffic; and
 - Suffering from a poor environmental image.

Qualitative retail needs in Catford

11. In Catford we found that:
 - Patterns of local spending indicate that Catford has a relatively low comparison and convenience market share, therefore there is an opportunity to increase this market share and claw back expenditure to the centre.

- Comparison shopping in Catford is very limited, with very few Goad key attractors and a mostly low to discount retail offer, which restricts consumer choice. Therefore there is a qualitative opportunity to improve the comparison offer.
- The convenience shopping provision in Catford is generally good; however two of the foodstore operators are discount retailers, therefore there is an opportunity to provide a higher quality foodstore to improve consumer choice.
- There is evidence that the comparison floorspace in Catford is overtrading, however the convenience floorspace is broadly in equilibrium.
- The IMD indicates that the Borough as a whole is relatively deprived and Catford town centre is in one of the more deprived wards in the Borough. This area has good access to convenience floorspace but poor access to comparison floorspace.
- The quality of the retail offer in the centre is quite poor, with a lack of large, modern retail units. Therefore there is scope to improve the quality of the offer, as well as improving the quality of the environment.

Assessment of commercial leisure and other uses

12. Our assessment of leisure need has considered broad quantitative needs (through expenditure growth) and qualitative needs through a consideration of the existing offer and a gap analysis. We have found that:
- There is an opportunity for an enhanced food and drink offer in Catford to meet quantitative and qualitative needs in order to provide an improved choice and better evening economy;
 - There is no clear cut quantitative need for a new cinema in the wider area, but due to lack of cinema facilities in Catford and subject to policy aspirations being consistent with other Borough-wide objectives, a cinema could be used to increase footfall as part of other regeneration initiatives in the town centre and attract new food and drink uses to the town;
 - There is scope for a gym in the town centre – likely to be a budget offering, in order to provide competition to other provision in the surrounding area.

Opportunities for Catford

13. The findings of the report have highlighted some key opportunities for Catford town centre as follows:
- Increase the comparison offer of the centre;
 - Increase the market share of Catford and claw back expenditure lost to other centres by providing additional retail floorspace,
 - Improve the quality of the retail offer in the centre by providing larger modern retail units as well as improving the quality of the environment in order to improve Catford's market share.
 - Provide an enhanced leisure and evening economy in the centre.

Catford Economic Development Action Plan

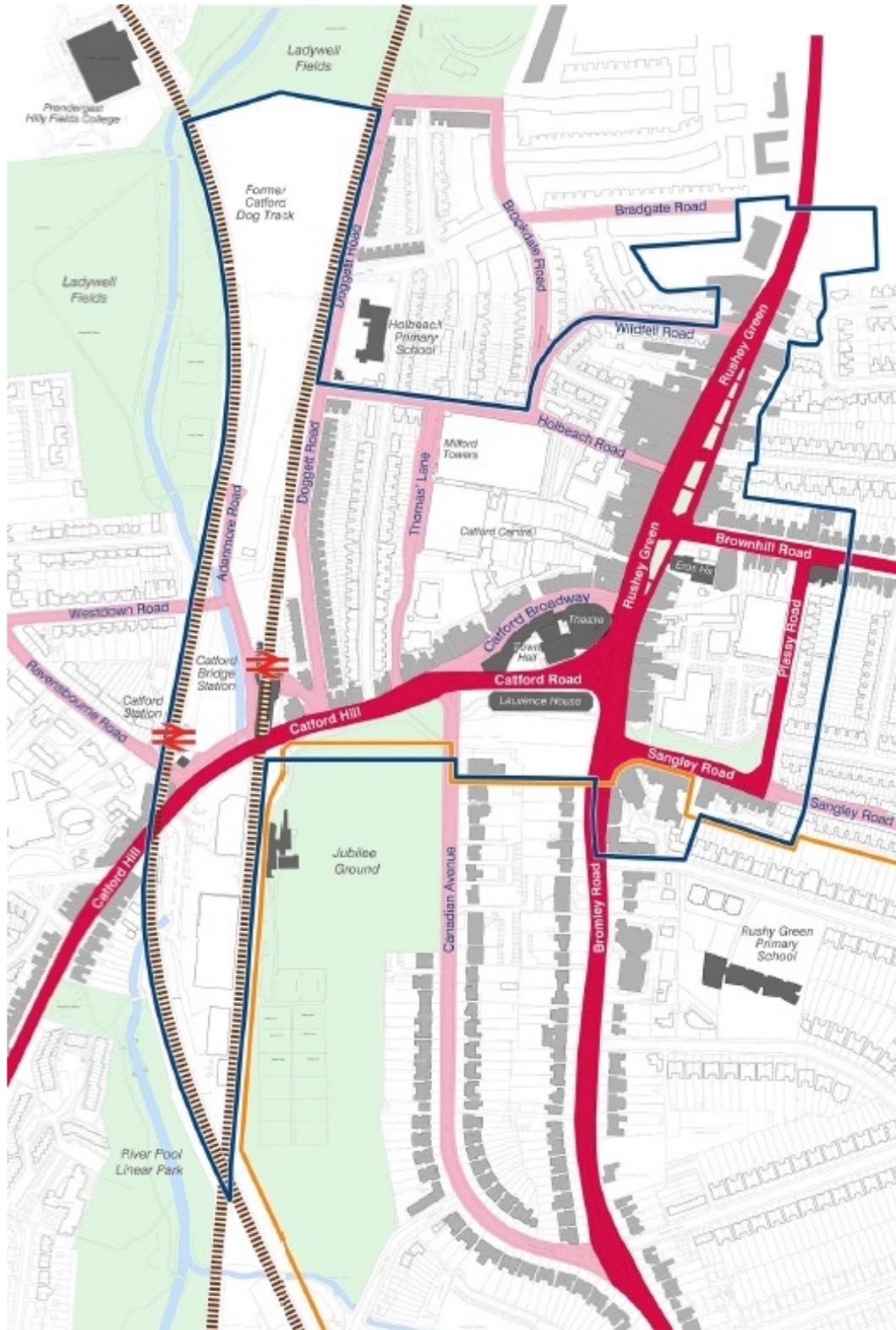
14. The opportunities identified for Catford have led to the development of an action plan to ensure that these opportunities are realised and to ensure town centre vitality and viability. The action plan considers each intervention by priority, plausibility and impact. The main elements of this action plan can be summarised as follows:
- Capital projects – it is in the Council’s power to provide planning policy support to town centre schemes through its local plan. Consequently the report has focused on four main town centre-related sites which are, in order of priority are:
 - Catford Centre;
 - Town Hall;
 - Laurence House;
 - Plassy Island.
 - Connectivity and public realm improvements to increase the retail performance of the centre and significantly improve the experience of shopping in Catford. These should include:
 - Traffic management and calming;
 - Street furniture;
 - Open spaces; and
 - Connectivity with stations.
 - Town centre management, to include:
 - Retail management;
 - Town centre management initiatives;
 - Ensuring distinctiveness;
 - Retail frontages.

1 INTRODUCTION

Terms of reference

- 1.1 Roger Tym & Partners (RTP), part of Peter Brett Associates LLP (PBA) was appointed in June 2012 to undertake a retail and economic impact assessment of Catford town centre for London Borough of Lewisham (LBL). The primary objectives of the study are:
- To assess the economic impacts of the regeneration proposals
 - To provide policy recommendations for inclusion in the Local Plan
 - To meet the requirements of the NPPF (particularly paragraphs 23 and 161)
 - To provide the robust, credible and up to date evidence to support the development of the Catford Town Centre Local Plan
 - To assist in the formulation of a strategy for mitigating the identified impacts during the regeneration period.
 - To withstand any scrutiny at the Examination into the Local Plan
- 1.2 The study area for the assessment is set out at Figure 1.1.
- 1.3 The key tasks identified by the Council that need to be undertaken are as follows:
- Carry out a Town Centre 'health check'
 - Review the existing analysis relating to the retailing characteristics of Catford Town Centre such as the strengths, weaknesses, opportunities and threats (SWOT), as well as opportunities for the shopping areas to expand or consolidate, this should include recommendations about the balance of town centre uses (A1 to A5, leisure and entertainment)
 - Assess the current retail, commercial, leisure and entertainment offer in Catford Town Centre. This task should involve consultation with existing businesses;
 - Review the retail, leisure and entertainment catchment area already established for Catford Town Centre;
 - Review the policy context, published borough retail capacity studies and existing information for Catford Town Centre and to expand the studies to include an assessment of non-retail commercial space for business - including space for additional leisure and entertainment uses.
 - Identify and agree with the Council any additional assessments needed (in addition to the scope of this commission) including;
 - augmenting/updating existing retail space capacity studies
 - any other studies necessary to provide a comprehensive assessment

Figure 1.1 Study area plan



- Ensure that an indication of likely future demand and opportunities for retail provision is understood and that the capacity of existing retail outlets to meet this are identified. Also;
 - Come to a view on the realistic retail need and capacity for convenience and comparison shopping floorspace and non-retail commercial space in Catford to 2026;
 - Consider the potential and market need for other business and leisure uses, including locations, type, size and rental levels. This should include an analysis of the existing and potential evening economy and how they could work together;
- Consider the whole time period over which sites will become available, i.e. over the period to 2026. This will involve estimates over and above those immediately available and estimate the physical capacity of sites to accommodate additional floorspace;
- Offer a view on the 'bench-mark' figure for retention of floorspace and expenditure within the borough taking into account the Experian report for the GLA, the Council's policy objectives and a sustainable approach to retail location;
- Develop a set of proposals and a Catford Economic Development Action Plan in conjunction with Council officers for ensuring town centre vitality during and beyond the proposed programme of regeneration. This plan should organise actions by priority (i.e. which are critical, important or non-essential) and plausibility (i.e. which are likely to happen/which are high risk), what activities would be undertaken and what the impact would be (i.e. the measure of success). Consult on these proposals with key stakeholders including Economic Development partners and local businesses.

Challenges for Catford

- 1.4 Catford town centre is defined as a major town centre in both regional and local planning strategies. It is the second largest town centre in the Borough and acts as the civic centre. The Retail Capacity Study (RCS), undertaken between 2009 and 2010, found that Catford has around 48,800 sqm gross of retail/service floorspace and stated whilst it has a good convenience and service provision, the comparison floorspace provision is well below the UK average.
- 1.5 There is a mix of independent and national retailers in the town centre; however the study did find that the centre was underperforming in terms of national multiples - especially higher order retailers.
- 1.6 Catford's retail offer has seen no change or improvement in recent years, making it more vulnerable to competition from other centres outside of the Borough. Spending in the Catford catchment is dominated by larger centres such as Croydon, Bromley, Canary Wharf, London's West End, Canada Water/Surrey Quays, Bluewater and Westfield Stratford, which have all seen recent investment/enhancement of their retail offers. Therefore, it will be important to understand how Catford can exist and thrive alongside these higher order shopping destinations.
- 1.7 Catford has already seen a decline in its MHE Retail Shopping Index ranking from 2003/2004. The MHE ranking is a database of over six thousand retail locations that

enables the user to rank and sort the UK's shopping venues against a range of different criteria for example, by market size, location type, market position and sector.

- 1.8 If Catford it is to maintain its position in the retail hierarchy, it is important that the centre's retail offer is enhanced; therefore investment in the town centre should be encouraged. The RCS also identified lack of investment in new retail floorspace, internet sales and decline in spending from the recession as threats to the town centre.
- 1.9 These identified threats are ones that are facing many town centres in the UK today. High Streets now account for just 50% of retail spending due to increased internet buying and other forms of e-commerce, the strength of non-central shopping centres together with attractions and convenience of retail parks and supermarkets.
- 1.10 Shopping habits have also changed, with fewer, longer trips, emphasising a trend towards larger centres offering greater choice and a better experience. As a result we have too many shops and middle ranking and smaller centres are contracting. The recession has also emphasised these trends.
- 1.11 The decline of the UK's High Streets led to the Portas review which concluded that High Streets are in crisis and cannot carry on as they are. They need to act fast and implement many of the lessons learnt from shopping centre models; running them like businesses, offering an attractive experience, better service and a clear specialisation.
- 1.12 The RCS also identified opportunities for Catford town centre, which included redevelopment of the Catford Centre, diversifying the retail offer (especially in regards to comparison goods) and building on its civic role. It is important that these opportunities are explored in further detail within the AAP in order to create an attractive and lively town centre that offers an attractive experience for visitors.

Structure of report

- 1.13 To meet our terms of reference and to address the challenges for Catford, our report is structured as follows:
 - Section 2, an explanation of the economic and retail context for Catford
 - Section 3, a brief summary of the relevant planning policy context
 - Section 4, discusses the available evidence on retail and town centre uses that informs our assessment
 - Section 5, an explanation of how we have engaged with existing businesses to understand their aspirations and view for the future of Catford town centre
 - Section 6, a description of the role and function of Catford Town Centre, including providing an updated 'health check'
 - Section 7, a presentation of the theoretical quantitative needs for Catford based on population and expenditure growth
 - Section 8, a description of the qualitative needs for Catford, considering whether there are any gaps in provision and restrictions on consumer choice
 - Section 9, consideration of whether there are any needs for commercial leisure uses or other town centre uses for Catford

- Section 10, presentation of our recommendations for an Economic Development Action Plan that the Council could take forward through in its Catford Local Plan

2 ECONOMIC AND RETAIL CONTEXT

2.1 In this Section, we describe the economic and retail context for Catford. This focuses on national economic trends and the recent Portas Review in order to understand the challenges faced by Catford both today and in the next 15 to 20 years.

National economic trends

- 2.2 High Streets now account for just 50% of retail spending and the downward trend is accelerating. This is due to internet buying and other forms of e-commerce and the strength of non-central shopping centres, together with the attractions and convenience of retail parks and supermarkets. Shopping habits are changing, with fewer, longer trips, emphasising a trend towards larger centres, offering greater choice and a better experience. As a result there are too many shops, and middle ranking and smaller centres are contracting. Approximately 15,000 shops in town centres closed between 200 and 2009, with a further 10,000 losses in the past couple of years¹.
- 2.3 The recession has emphasised these trends, with store portfolios being downsized, brand failures causing widespread closures and, with what little growth there is, being concentrated on larger stores in the larger destinations, or out-of-town. Supermarkets have accelerated their expansion. The rate of in-centre retail development has slowed to an effective halt; everywhere, town centre redevelopment schemes are stalled.

Portas Review

- 2.4 This downward spiral led to the Portas Review² and the publication of (rather less well known) supporting research³. Portas' conclusions are stark: High Streets are in crisis. Most cannot carry on as they are. The research found that one third of all town centres were in need of help (failing or degenerating); over one third were considered currently stable; and that while a quarter were "thriving" only 3% were actually improving. But these kinds of generalisations hide some significant regional and category variations.
- 2.5 While the value of our high streets and Portas's recommendations for them may not have won the retail sector over, much of the analysis is right. High Streets need to act fast and implement many of the lessons learnt from shopping centre models; running them like businesses, offering an attractive experience, better service and a clear specialisation.
- 2.6 Jeremy Newsum, the respected Grosvenor Estate Executive Trustee, recently⁴ summed up the challenge like this:

"Physical retailers have to fall back on service and the experience. Here, they need to act collectively, because one trip to the high street can be undermined by one poor retailer. Service needs to be based on knowledge of the product, place and customer."

¹ The Portas Review – An independent review into the future of our High Streets. December 2011

² The Portas Review – An independent review into the future of our High Streets. December 2011

³ Dept for Business, Innovation and Skills: Understanding High Street Performance. December 2011

⁴ Property Week International 2 March 2012

Shopping centres seem to have a tremendous advantage over the high street in this respect. A single owner whose interests are aligned with the retailer should be able to see off multiple competing owners, a bureaucratic council and poor transport plans. Local councils need to wake up and take a new approach to town centre management, which must create a partnership organised to deliver a set of common objectives”.

Understanding High Street performance

- 2.7 The research supporting Portas showed that the drivers of good performance were as much external as internal, for example:
- Externalities – GDP growth and retail expenditure
 - Physical factors – constrained linear high streets, in-town shopping centres (or not), character, accessibility, parking (and the level of charges)
 - Property factors – size and quality of stock; rents, business rates; ownerships and investment yields
 - Spatial factors – the presence of retail parks, supermarkets, out-of-centre shopping centres
 - Retail mix – clone town syndrome; independents; markets
 - Demographic factors – catchment area; age profile (e.g. grey pound and student economies)
 - Technological change – e-commerce and m-commerce; and consumer information
 - Regulation – planning policy, Sunday trading, competition
 - Centre management – leasing strategies, BIDs, TCM
- 2.8 Overall, the research found that the greatest influence has been the structural change in the market within which high streets sit, and the competition offered by large-format retailing and out-of-town centres. Over the last ten years responses to the issue of high street decline have concentrated on the responses have concentrated on a limited number of familiar themes:
1. Improving the built form and configuration – by better access (often by bus, or by introducing car clubs), public realm enhancements, lower parking charges.
 2. The drive for differentiation – as a place for eating out, for their cultural interest, for leisure and local services and not just routine purchases. Some have managed a distinctive theme, even branding. Also, local loyalty cards, the use of social media, and maximising the attraction of local markets. People’s Supermarkets, social enterprises and the like can be effective.
 3. Policy prioritisation – local applications of national “town centre first” planning policies; community and neighbourhood planning.
 4. More developed place management – town centre management, BIDs, Community Interest Companies.
 5. Developing alternative business models and new approaches – Co-operatives, social enterprise, Community assets, Local food initiatives, events and activities

Summary

- 2.9 National economic trends are challenging town centres; smaller centres lacking a distinctive offer, such as Catford, are likely to see a further deterioration in their performance without a strong policy intervention. These trends were put into sharp focus by the Portas Review and the supporting research has provided a number of themes, including improving the built form, distinctiveness, application of 'town centre first' planning policy, town centre management and alternative business models. These national trends and themes have set the scene for our recommendations on what can be achieved in Catford.

3 PLANNING POLICY CONTEXT

3.1 Before considering the specific research for Catford, we review the existing planning policy context. This includes the National Planning Policy Framework (NPPF) as the overarching policy objectives. But we also review the Development Plan – London Plan and Lewisham Core Strategy – as well as reviewing the ideas put forward in the original consultation version of the Catford Area Action Plan.

National Planning Policy Framework

3.2 The NPPF was published by the Government in March 2012 and replaces all previous Policy Statements and Policy Guidance Notes. Paragraph 22 states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres. This includes a requirement that *'needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability'*. This introduces a challenge for local authorities to maximise central opportunities.

3.3 The NPPF also requires Local Plans to be based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. In terms of a retail evidence base, paragraph 161 states that they should assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the role and function of town centres and the relationship between them, including any trends in the performance of the centres;
- the capacity of existing centres to accommodate new town centre development;
- locations of deprivation which may benefit from planned remedial action.

London Plan

3.4 The London Plan was published in July 2011 and sets out the overall strategic plan for London. In respect of the local hierarchy of centres, Catford is designated as a Major Centre in the London Plan. Lewisham is also designated as a Major Centre, with Deptford and New Cross as district centres.

3.5 The London Plan has also designated Catford, with Lewisham and New Cross, as an Opportunity Area which has scope for intensification, regeneration and renewal. Policy 2.13 states that, in terms of LDF preparation, boroughs should develop more detailed policies and proposals for opportunity areas and intensification areas. The Plan also indicates that this opportunity area is suitable for 8,000 new homes and 6,000 new jobs.

Lewisham Core Strategy

3.6 The Lewisham Core Strategy (CS) was adopted in June 2011 and sets out the overall strategic vision for the Borough. The CS vision for Catford town centre is for it to become a lively, attractive town centre focused around a high quality network of public spaces.

- 3.7 Core Strategy Objective 4 is concerned with economic activity and local businesses and states that the status of Catford as a major town centre will be maintained, with a focus on quality design and development.
- 3.8 Spatial Policy 2 designates Catford as a regeneration and growth area. The policy states that Catford town centre will be designated as a major town centre with new development seeking to maintain and enhance its status, to secure its physical regeneration, and ensure its continued contribution to the local night time economy. The policy also states that Catford will build on its role as the civic heart of the Borough, accommodate an additional 22,000 sqm of additional retail floorspace by 2026, and be one of the Borough's preferred locations for new office development.
- 3.9 The retail hierarchy and location of retail development in Lewisham is dealt with in Core Strategy Policy 6. This policy shows that Catford and Lewisham are the two major town centres in the Borough. The policy also states, inter alia, that the Council will:
- expect major retail development, leisure and related town centre uses, including arts, cultural and entertainment facilities, to be located within the major and district centres;
 - designate primary and secondary frontages within the Major and District town centre to ensure essential services are maintained and contribute to their vitality and viability; secondary frontages will help provide for the uses appropriate to the night time economy; and
 - support the retail hierarchy through farmers' and street markets within the town centre, local centres and parades.

Draft Local Plan

- 3.10 The preferred options consultation for the Catford Town Centre AAP took place in 2007. The AAP was then put on hold while the Core Strategy was progressed. Following changes to land ownership in Catford, including the Council's purchase of the Catford Centre, work on the AAP, now called the Catford Local Plan, has now resumed and public consultation on a draft options document will take place as a further part of this work.
- 3.11 The key aim of the preferred options AAP in 2007 and the now emerging Catford Local Plan is to maximise and enhance the positive things about Catford whilst addressing the things which the community and stakeholders want to see changed or improved. The Local Plan is also intended to stimulate development interest and will be used by the Council when making planning decisions.
- 3.12 The AAP vision for Catford town centre was for it to become a lively, attractive town centre focussed around a high quality network of public spaces. It will have a well-designed shopping centre and leisure uses, provide homes for a large, diverse residential community and will be the home of Council services for the Borough.
- 3.13 The AAP identified a number of opportunity sites in Catford town centre that would help fulfil its vision. These development sites were also included in the AAP's preferred town centre boundary and are as follows:
- i. the Catford Shopping Centre;

- ii. the Civic Quarter and South Circular;
- iii. Plassy Road Island;
- iv. Greyhound Stadium and railway stations; and
- v. the Wicks Site.

3.14 These sites are also shown on Figure 3.1 below:

Figure 3.1 Opportunity sites in Catford town centre



3.15 Below is a summary of the preferred AAP options for these sites from 2007:

- **Catford Shopping Centre:** the preferred option for this site was for it to be a strengthened core retail area with an improved shopping centre, high quality retail units, integrated supermarket, new public space and links to Catford Broadway and Rushey

Green, office and residential uses, and an improved environment to the surrounding residential areas, especially Holbeach Road and Thomas Lane.

- **Civic Quarter and South Circular:** the preferred option for this site was to realign the South Circular to provide the opportunity to create new public spaces and redevelop the Council sites for the community, leisure, shops, cafes, restaurants, office or hotel uses, with activity at street level. The setting for the Broadway Theatre would be improved, and Catford Broadway would become a focal point for the market, small shops during the day and cafes/restaurants and the theatre during the night.
- **Plassy Road Island:** the preferred option for this site is to create a non-core retail area with leisure and residential uses, linked to the town centre and Rushey Green, with active street frontages along key routes and landscaping to define and soften site boundaries.
- **Greyhound Stadium and railway stations:** for this site the Council planned to create a mixed-use redevelopment including residential, community, small scale convenience retail units and open spaces, with strong links to the town centre and Ladywell Fields.
- **Wickes Site:** the preferred option for this site is to create a comprehensive mixed use redevelopment including residential, employment, comparison retail, community facilities and small scale convenience retail uses. The River Ravensbourne will provide the focus for redevelopment and the development should include improved links to the Town Centre and improved definition of the site through landscaping and high quality building design.

3.16 The APP also set out the preferred options for retail and leisure. In summary these were as follows:

- In the Core Shopping Area set up a target for no less than 70% of uses to be A1 uses; and protect existing larger retail outlets in the core from being subdivided into smaller outlets.
- Non-core shopping areas to restrict A5 uses more than A3 and A4.
- Evening economy, encourage evening economy uses in a particular area.
- Other shopping areas, permit a range of uses within the other shopping areas with no restrictions.
- Retail parks, permit retail park areas to be redeveloped included mixed uses.
- Street market, designate specific areas where the market can operate.

Summary

3.17 The NPPF provides a high level policy context for planning policy for Catford, setting out the evidence base requirements for town centre uses and encouraging local authorities to meet its needs in full. This is particularly relevant for Catford, given the need to maximise central opportunities for town centre development.

3.18 The London Plan and Core Strategy identify Catford as a Major Centre and recognise the regeneration opportunities in the town centre. The draft Catford AAP from 2007 provides a number of commendable aims and aspirations, including the key development sites. These still have merit, but the prevailing economic context, the challenge presented for the latest

iteration for this Plan will be to provide deliverable options and both short term and long term objectives to maintain and enhance the vitality and viability of Catford town centre.

4 EXISTING EVIDENCE BASE

- 4.1 The Council already benefits from a range of available evidence that can inform our study. The key evidence base document relevant to this study is the Lewisham Retail Capacity Study, undertaken in 2009 and published in 2010. Other evidence base documents that can be used to inform this update include the Lewisham Retail Capacity Study Supplementary Report, also published in 2010, and the Lewisham Annual Monitoring Report 2010/11. We now review this evidence as it applies for Catford.

Lewisham Retail Capacity Study

- 4.2 The Lewisham Retail Capacity Study (RCS) was undertaken by NLP in 2009. This study reviewed the existing retail provision in the Borough and assessed the retail need and capacity for additional convenience and comparison retail floorspace in the Borough to 2016. The RCS also undertook a sequential approach of all the town and district centres and examines potential sites that may be capable of accommodating additional retail floorspace in accordance with national planning policy.
- 4.3 In terms of convenience floorspace, the study found that there was an immediate capacity for up to 2,551 sqm net in the Borough as a whole, which increases to 5,406 sqm at 2014, 8,643 sqm at 2019, and 11,851 sqm at 2025. The study states that this additional convenience floorspace should be distributed across the Borough in line with the retail hierarchy and thus Lewisham and Catford should be the preferred locations for a significant proportion of the additional convenience floorspace.
- 4.4 In Catford the study found there was an immediate capacity for 551 sqm net of additional convenience floorspace, rising to 1,133 sqm at 2014 and a further 2,525 sqm at 2025. In terms of comparison floorspace, the study found that across the Borough as a whole there was no capacity for additional comparison floorspace by 2014. However by 2019 there is a capacity for an additional 10,736 sqm gross, increasing to 48,806 sqm gross by 2025.
- 4.5 In terms of capacity specific to Catford, the report does state that it has a significant amount of comparison goods capacity at 2014 (£22.98 million), but across Lewisham Borough as a whole this is counter balanced by the capacity deficit elsewhere. It should be noted that much of the comparison goods capacity for Catford was pent up demand in the base year due to an in-balance between the implied survey derived turnover of Catford in the base year (i.e. the level of turnover achieved by Catford if the market share according to the household survey is applied to the total pot of expenditure) and the benchmark turnover calculated by NLP.
- 4.6 The study also identifies potential sites in the Borough that could accommodate the additional floorspace requirements. The report states that the only site in Catford that could provide a significant level of comparison goods floorspace is the Old Market Site, which encompasses the Tesco store in the Catford Centre, the multi storey car park, and the car park and depot at the back of the centre. The report acknowledges that the site is recognised as a priority in the emerging Catford AAP (at the time) and states that securing investment in Catford is crucial if it is to maintain and hopefully enhance its role in the retail hierarchy in the future.

Retail Capacity Study Supplementary Report

- 4.7 In 2010, NLP prepared an addendum to the RCS which provided guidance on the continuing validity of the RCS in the context of the publication of PPS4 in December 2009 and any changes in the base data/other assumptions, as well as an updated analysis of the land uses and recommendations on the appropriate primary and secondary (core and non-core) areas within each of the nine defined major and district town centres in the borough.
- 4.8 The report concluded that the data used in the RCS remained up-to-date and therefore the analysis remained robust. In light of the PPS4 Guidance the report also recommended that LB Lewisham adopt a 1,000 sqm threshold to govern the assessment of retail and leisure proposals across the Borough.
- 4.9 The review of the primary and secondary frontages in the report also suggested that the secondary frontages be extended to number 2-12 and 3-15 Brownhill Road as they are in active use, primarily for retail services and convenience functions. It also considers that the Mecca Bingo Hall on Plassy Road would be appropriately designated as a secondary retail frontage as it is a major contributor to the evening economy.
- 4.10 The report also recommended removing the residential dwellings at 2-20 Sangley Road and 3-13 Bromley Road from the secondary shopping frontages. All the changes were published as part of the Site Allocations Plan Proposed Submission Version. There were no representations made during the consultation.

Lewisham AMR 2010/11

- 4.11 The Lewisham Annual Monitoring Report (AMR) 2010/11 contains data on Catford town centre and found that at the time of reporting, there were 201 ground floor units, with 176 of these occupied by A1-A5 uses. Of these retail units, 106 were in A1 use. The report also found that 5% (10 units) of the units in the town centre were vacant, which is a decrease from 8% in 2009. This data enables us to make comparative analysis with the current state of the town centre.
- 4.12 Subsequent sections of this report update the evidence in relation to:
- i. Quantitative need (7)
 - ii. Quantitative need (8)
 - iii. Commercial leisure and other uses assessment (9)

Summary

- 4.13 The existing evidence found that there was capacity for both convenience and comparison floorspace in Catford. The capacity for convenience floorspace was across the Borough as a whole; however Catford was one of the preferred locations for this floorspace. Whilst there was not much additional capacity for comparison floorspace across the Borough as a whole, there was found to be a significant amount of capacity available in Catford. The capacity identified for the comparison goods is post 2014. This evidence is supplemented in subsequent sections of this report.

5 ENGAGING BUSINESSES IN CATFORD

5.1 Our terms of reference require us to engage with businesses in Catford. To achieve this, we instructed NEMS Market Research to conduct a business postal survey of town centre businesses in Catford. This business survey was supplemented by some targeted telephone interviews of key town centre businesses.

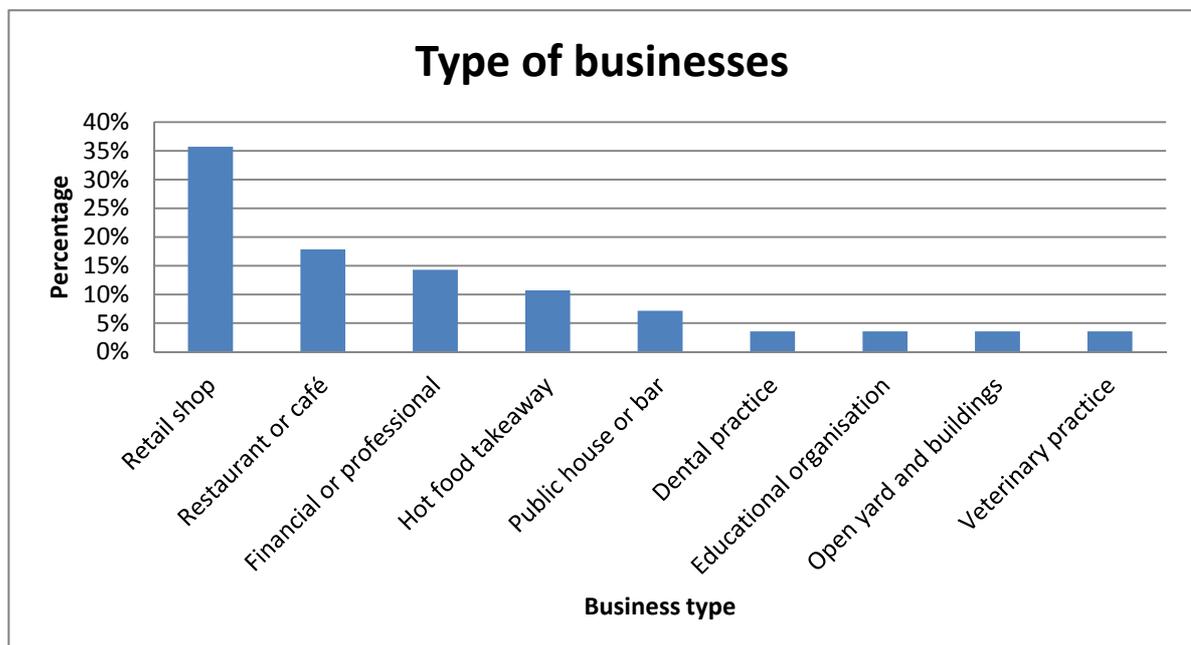
Business survey

5.2 NEMS sent out 300 surveys in total and received a response rate of 9%. The main objective of the business survey was to establish the views of local businesses in respect of location, suitability of premises, environment and to identify areas of improvement. Although the response was lower than expected (25% was originally sought), this does provide us with some general evidence on business intentions and highlights the fact that businesses are not currently keen to engage about the future of the town centre.

Nature of businesses

5.3 Figure 5.1 below shows that the majority (36%) of businesses that responded to the survey were retail businesses. A further 18% were classified as restaurants and cafes, and financial and professional services represented 14% of the businesses that responded.

Figure 5.1 Nature of businesses in Catford



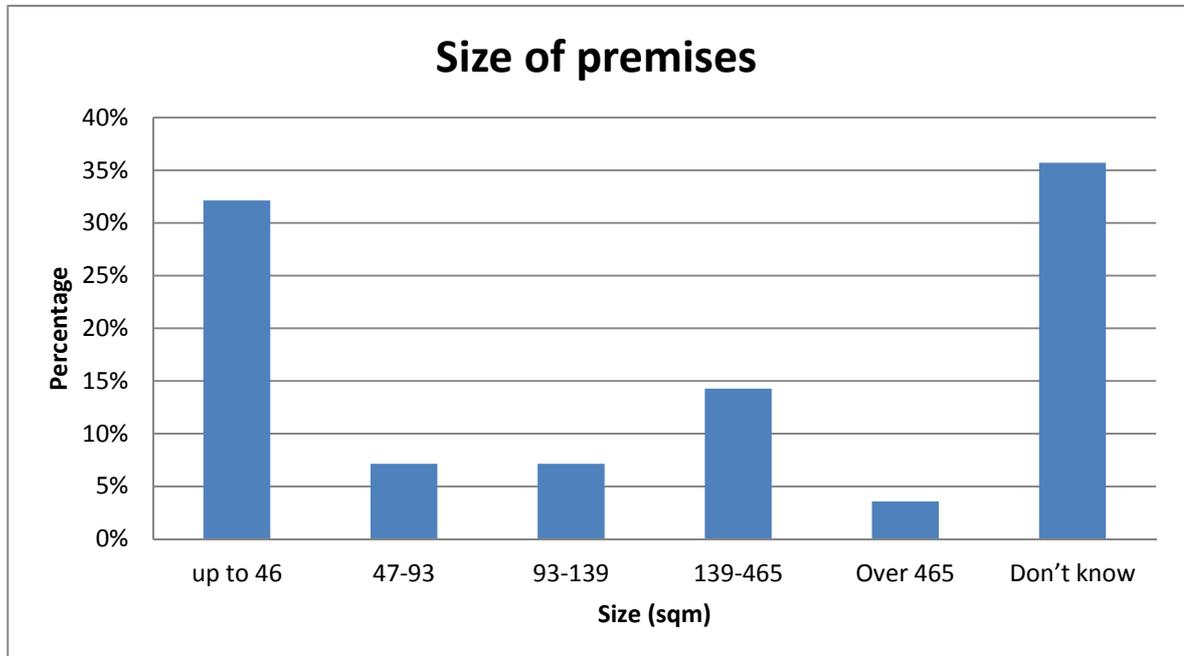
5.4 The vast majority of responding businesses (79%) were independent/individual businesses. Only 7% were part of a regional multiple chain, and 14% were part of a national multiple chain. This result is expected as there is a significant representation of independent retailers present in Catford.

Premises

5.5 Leaseholders represent 64% of the respondents and freeholders represent only 32%. Figure 5.2 shows that the largest proportion on units (32%) occupied by respondents are

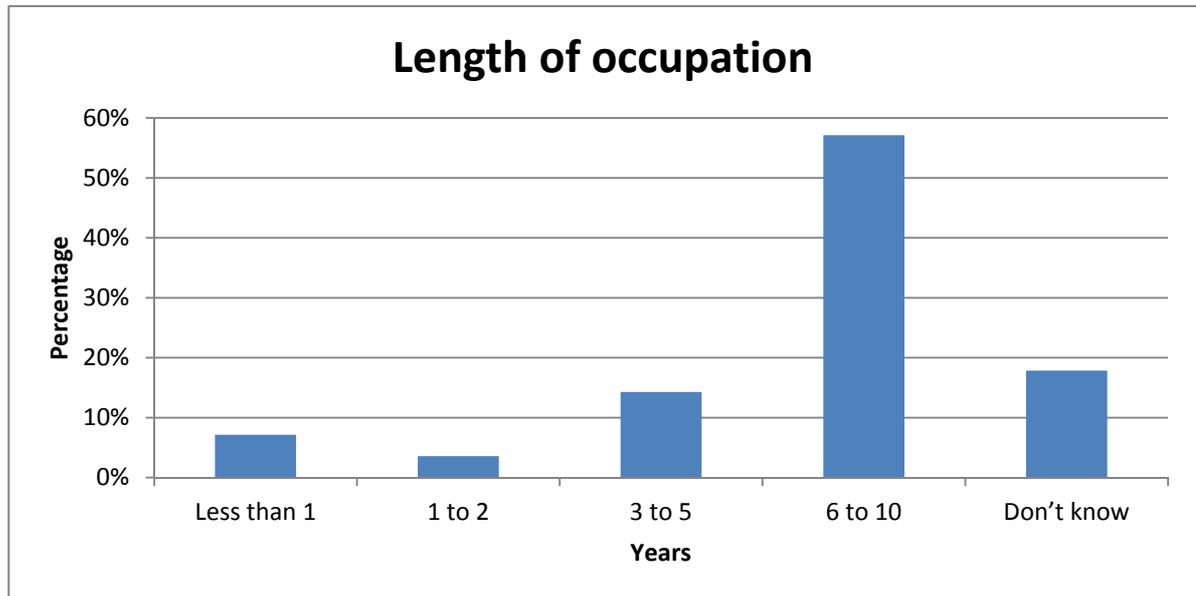
small, at up to 46 sqm. A very small proportion of respondents occupied units of over 465 sqm. This suggests that most of the business premises found in Catford are of a relatively small size.

Figure 5.2 Size of business premises in Catford



- 5.6 Figure 5.3 shows how long the respondents have been in their current premises. The majority (57%) have been at their current premises for 6-10 years and only 7% have been there for less than a year. This suggests that the majority of businesses in Catford are well established and that there have not been many new businesses moving into Catford in the last few years.
- 5.7 Some 71% of respondents were satisfied with their current business premises and only 29% were dissatisfied. This suggests that the types of premises provided in Catford are meeting the needs of the majority of businesses located there. Of the 29% of respondents that were dissatisfied with their current premises, the reasons cited were that they would prefer a better location (88%), their premises are too small (25%), and the parking is poor (25%).

Figure 5.3 Length of time businesses have been in their current premises

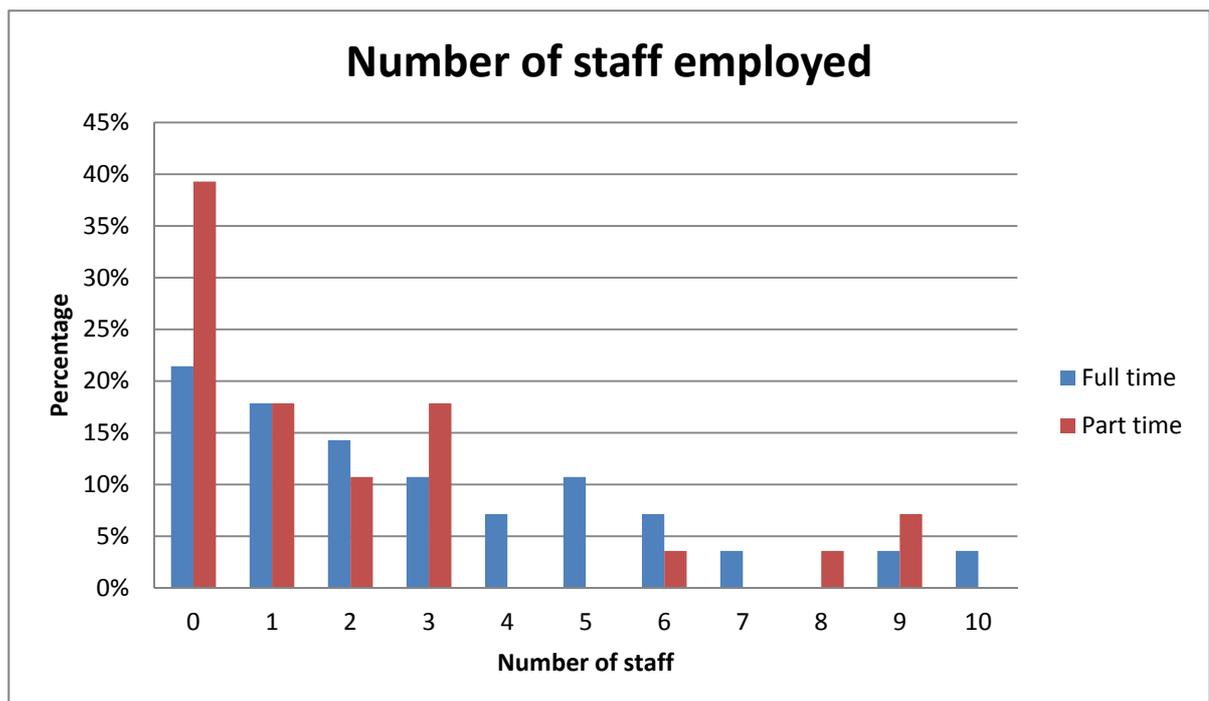


5.8 Some 68% of respondents stated that their premises had upper floors, however of those with upper floors, only 21% were owned by the business at ground floor. The uses of the upper floors varied but the most common use was for residential (37%). 11% of upper floors were used for office space.

Staff

5.9 Figure 5.4 shows how many part time and full time staff the respondents employ for their business.

Figure 5.4 Number of staff employed by businesses



5.10 This shows that the majority of respondents did not employ any additional full time (21%) or part time staff (40%). Of the businesses that did employ staff, they did not employ very many, with 46% employing 1-3 part time staff, and 42% employing 1-3 full time staff. This suggests that the majority of businesses in Catford are small and do not employ large numbers of people. The majority of respondents also had no full time or part time vacancies.

Trading performance

5.11 The largest proportion of respondents (54%) stated that their turnover has decreased in the past year and only 14% said it had increased. Respondents' expectation of their turnover in the year ahead is slightly more optimistic with 25% expecting it to increase, 32% expecting it to decrease and 17% expecting it to stay the same. A similar proportion of respondents considered that the turnover of their business was average when compared to other businesses of a similar size and type (39%) as those that considered it was below average (35%). Only 14% considered it to be above average.

Future intentions

5.12 The majority of respondents (64%) were planning on staying at their existing premises. However 4% were planning on relocating elsewhere in Catford, 7% to another location in LB Lewisham, and 11% to a location outside of LB Lewisham. The reasons cited for wanting to relocate were that:

- the area has gone downhill/changed drastically for the worse (33%)
- the lack of parking (17%)
- wanting to move to a more prominent location (17%)
- no support from the Council (17%)
- cannot find good staff (17%)
- the need for larger premises (17%)

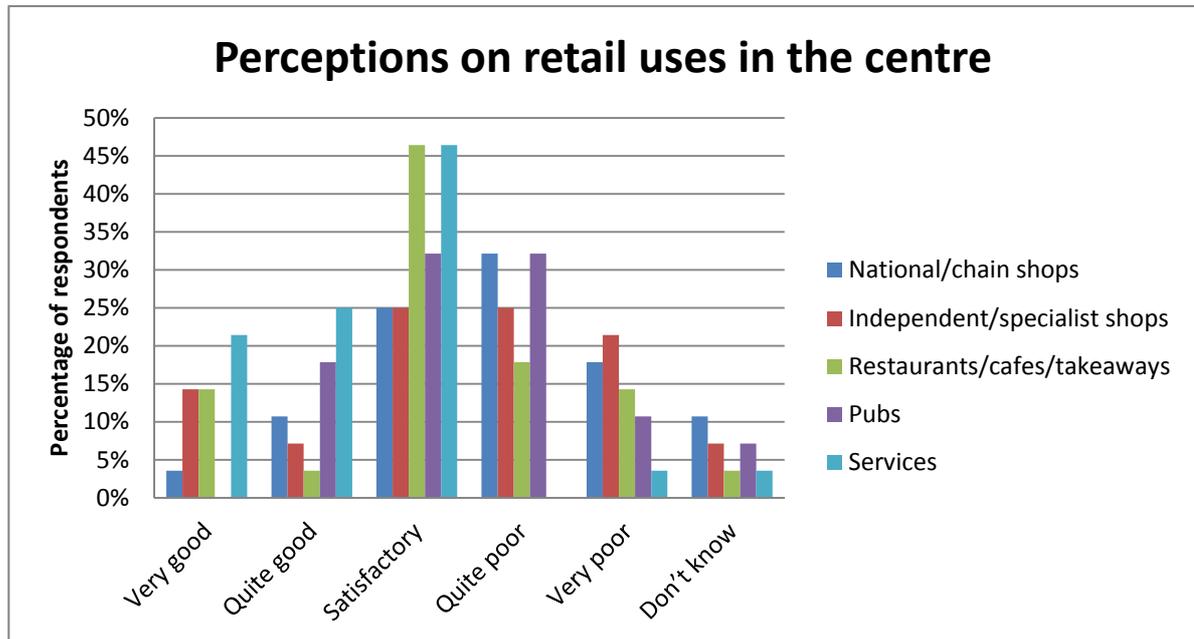
5.13 In terms of different types of businesses, 70% of retail businesses stated that they wanted to remain where they were. None were planning on relocating as the remaining 30% either stated 'other' (20%) or that they wanted to sell their business (10%).

5.14 50% of financial and professional businesses stated that they wanted to relocate to a location outside of LB Lewisham. The remaining 50% either wanted to remain in their existing premises (25%) or relocated elsewhere in Catford (25%).

Perceptions of the town centre

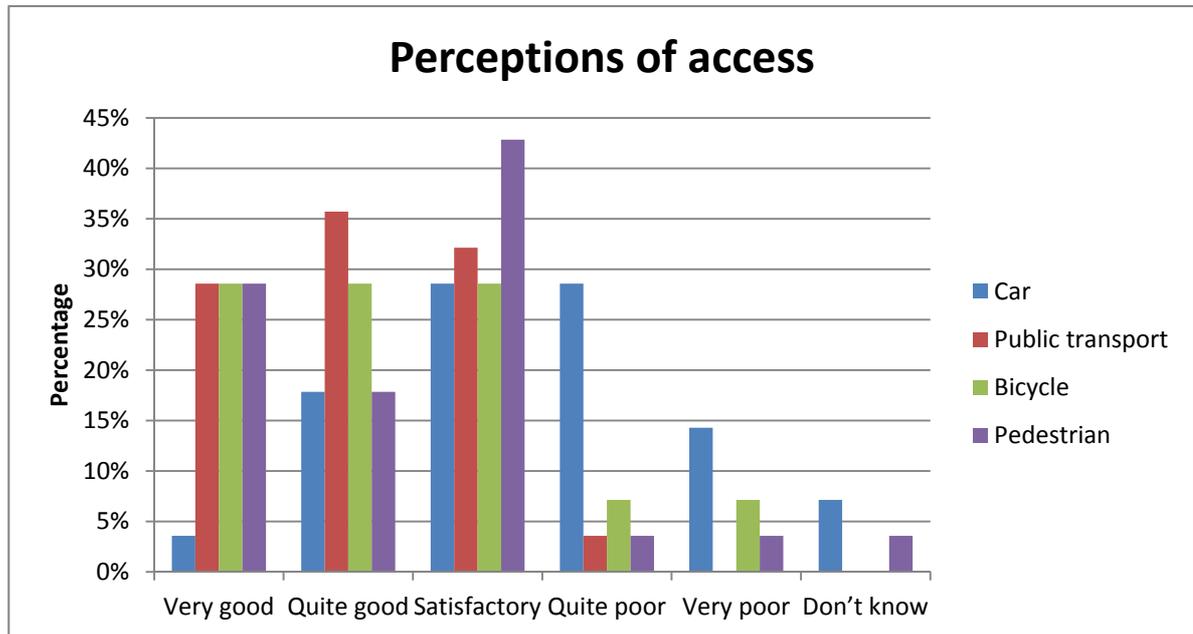
5.15 Figure 5.5 shows respondents' perceptions of the provision of retail premises in the town centre. "Satisfactory" was the most common response for the majority of categories and quite poor was also quite a common perception. Not many of the respondents thought that the provision of any type of retail use was very good. However the provision of retail services in Catford were perceived positively, with the majority of respondents stating these were satisfactory to very good.

Figure 5.5 Perceptions of retail uses in Catford



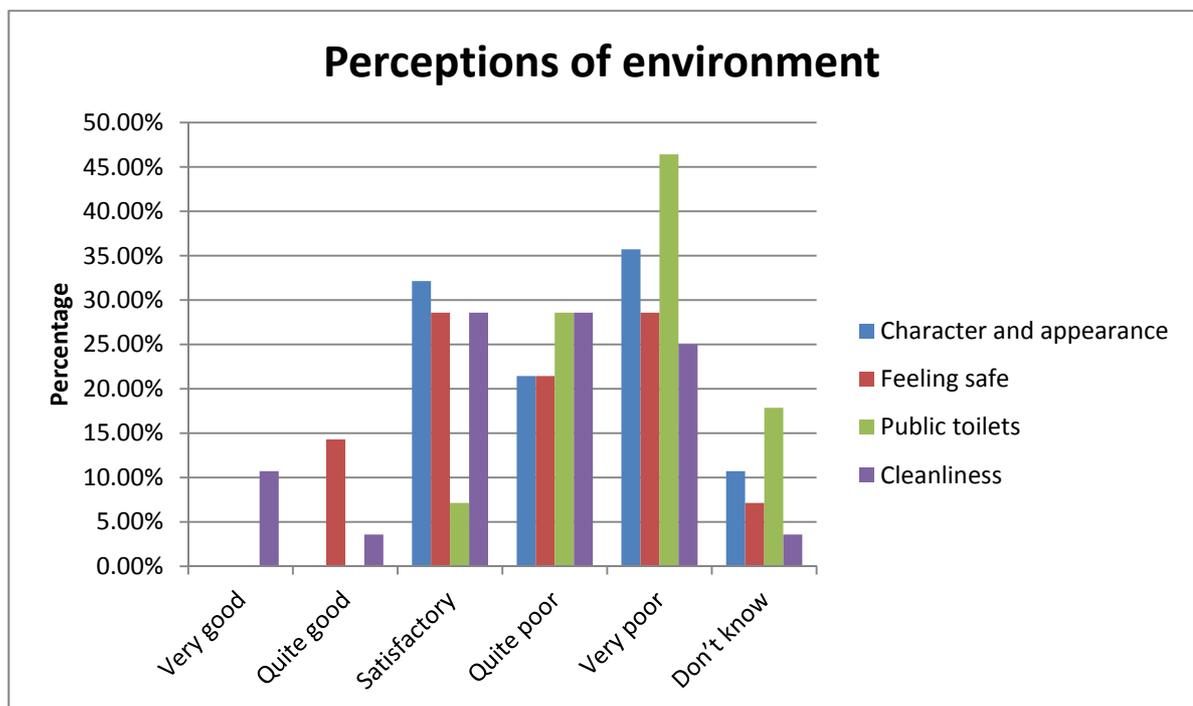
- 5.16 Overall the majority of respondents consider that the provision of retail premises in Catford to be quite poor to satisfactory. Respondents' perceptions on the range and quality of the shops in Catford were also similar with the majority stating that these were quite poor to satisfactory.
- 5.17 In terms of the range of leisure and recreational facilities, the biggest proportion (32%) of respondents thought that these were quite poor. A further 21% felt they were very poor. 40% of respondents did however say they were satisfactory to very good. The hotel provision in Catford is also perceived negatively, with 53% of respondents stating it was quite poor to very poor. However this is to be expected given the function of the centre and location outside of central London.
- 5.18 Figure 5.6 shows respondents' views on access to Catford by various different methods. Overall Catford is perceived to have satisfactory to very good access by most methods of transport. Notably the accessibility by public transport is perceived to be good, which is as expected due to the good bus links and rail stations located near to the town centre.
- 5.19 Catford was seen as least accessible by car, with the majority of respondents stating access by car was satisfactory to quite poor.

Figure 5.6 Perceptions on access to Catford by different modes of transport



5.20 Figure 5.7 relates to respondents' perceptions on the quality of the environment in Catford. It shows that, overall, the environment of Catford is seen quite negatively. No respondents thought that the character and appearance of Catford is good or very good and the majority of respondents either felt the feeling of safety in Catford was satisfactory or quite poor. However a good proportion of respondents did also state that the character and appearance of Catford and the cleanliness of Catford was satisfactory.

Figure 5.7 Perceptions of Catford's environment

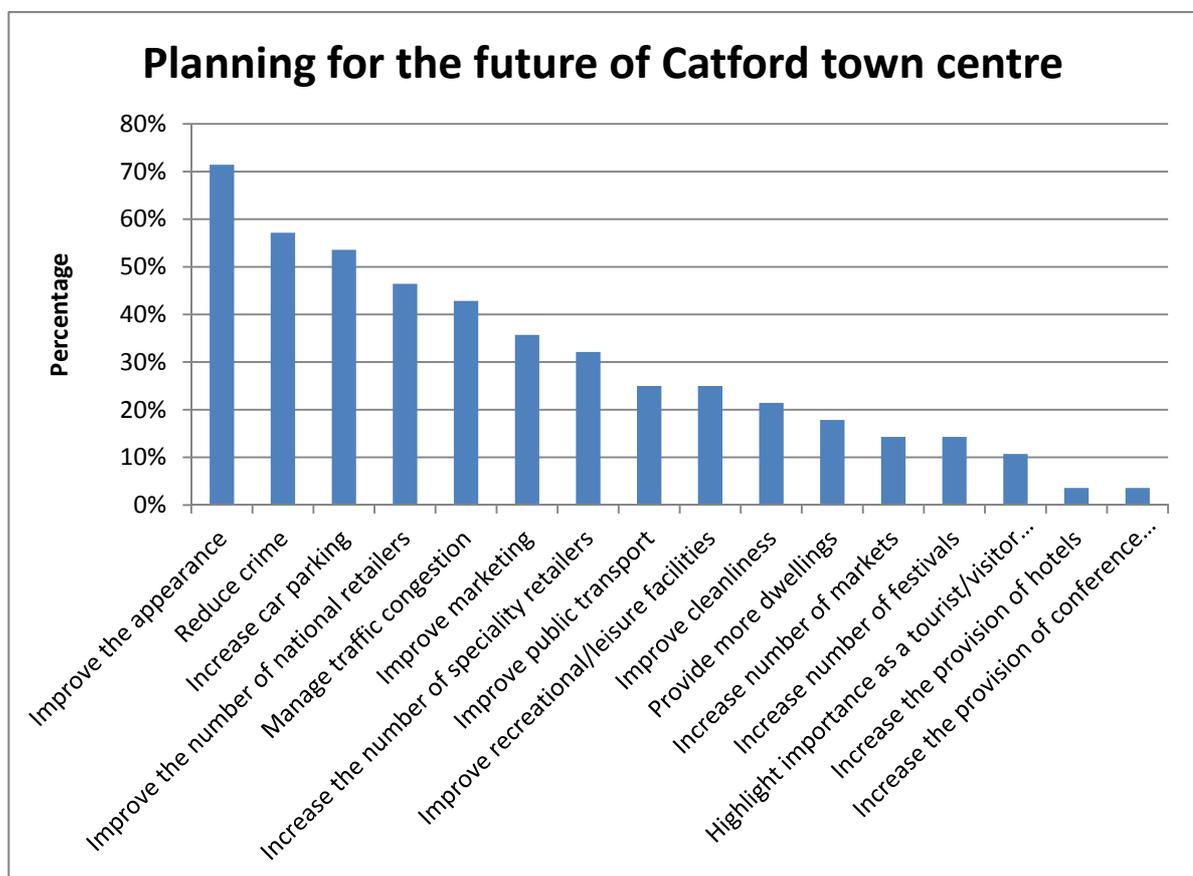


Improvements to Catford

5.21 Respondents were also asked what they thought were the five most important things to address when planning for the future of Catford town centre. Figure 5.8 shows the answers that had the most responses in rank order:

- Improving the appearance of Catford
- Reducing crime
- Increasing the car parking
- Improving the number of national retailers in the centre
- Managing traffic congestion.

Figure 5.8 Planning for the future of Catford town centre



Next steps for consultation

5.22 The business consultation undertaken in this report is largely a fact finding exercise in respect of the type of business and their perceptions over the future of Catford town centre. As the Council progresses with the Local Plan for Catford, alongside the statutory consultation periods we advise that further targeted events take place for town centre stakeholders to ensure the gathering of further feedback on emerging policy proposals for the town.

Summary

- 5.23 Overall, the business survey indicates that Catford town centre has a high proportion of small independent retail businesses. The majority of respondents occupy small premises, but the businesses explained that they are happy with their existing premises and planned to remain there for the foreseeable future. This is likely to be due in part to the type of business that replied to the survey.
- 5.24 In terms of perceptions of Catford, most of the aspects of Catford were rated as satisfactory to quite poor; suggesting that businesses think Catford could be significantly improved. Notably the environment of Catford was perceived negatively and improving the appearance of the centre was the most commonly cited answer when the respondents were asked about the most important things to address when planning for the future of Catford. Reducing crime, increasing car parking and improving the number of national retailers were also common answers.

6 CATFORD TOWN CENTRE

- 6.1 Catford is the Borough's second largest town centre and the civic centre. It is classified as a major town centre in the London Plan. Development in the 1960s and 1970s had a considerable impact on the quality of the centre's townscape: The old Town Hall ('Catford Cathedral') has been replaced and Laurence House is on the site of the former St Lawrence Church; Eros House replaced the Lewisham Hippodrome; and the Catford Centre was built, the only significant retail development since the war.
- 6.2 In this section, we review Catford's role in the hierarchy, undertake an updated 'health check' of the town centre, review its vitality and viability and update the SWOT analysis undertaken in the RCS.

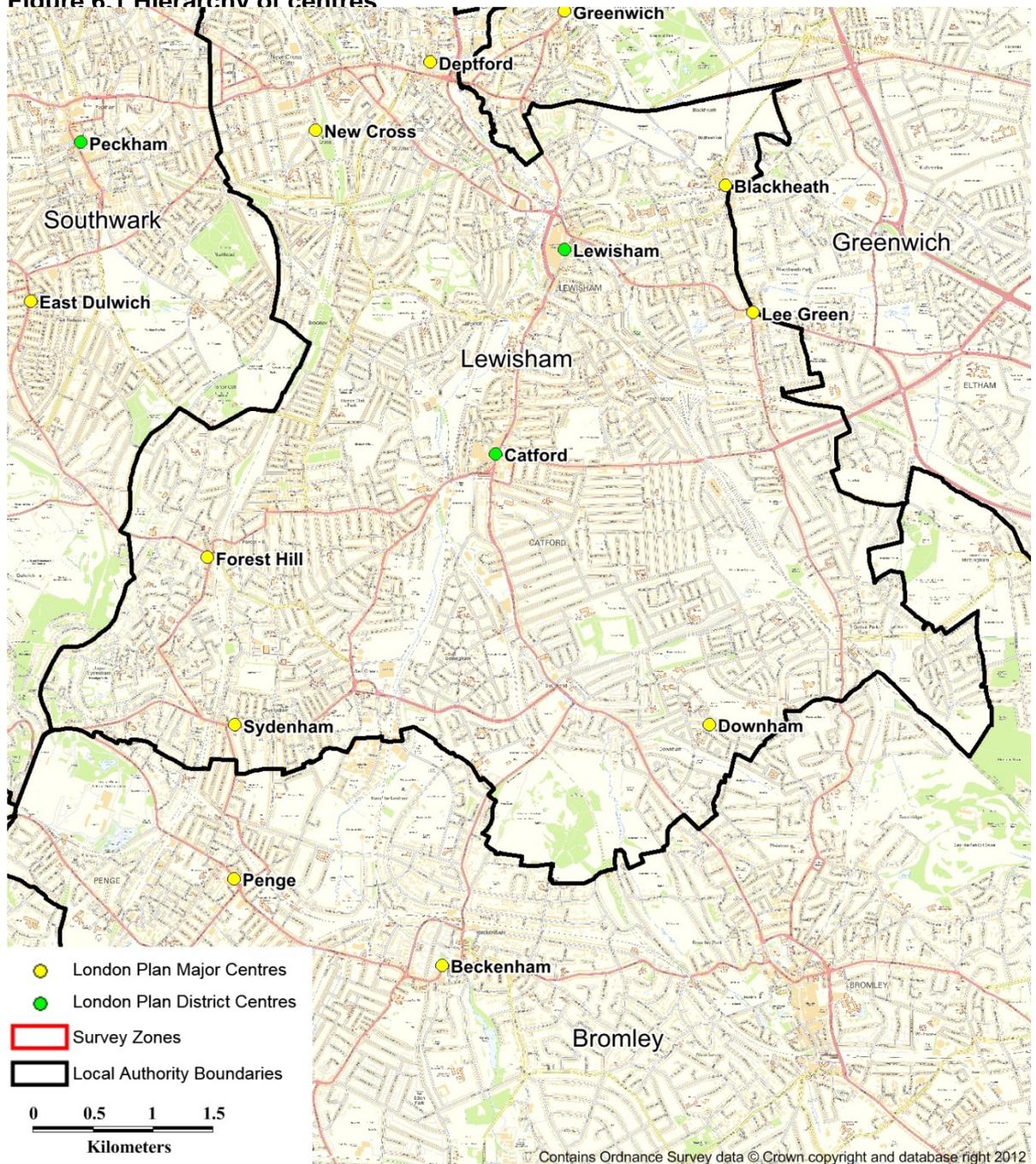
Comparative analysis of Catford

- 6.3 In Figure 6.1, overleaf, we provide a plan that plots the key competing centres in the sub-region, which demonstrates that Catford is particularly close to Lewisham and Bromley as competing comparison goods shopping destinations.
- 6.4 We have reviewed the rank of Catford compared to other centres in the sub-region in Table 6.1 below. In 2008, Catford was ranked 440 on the Management Horizons Europe MHE Shopping Index. The MHE Index measures the relative strength of each retail location based on retailer count, comprising fashion operators, non-fashion multiples and anchor stores. It was also classified as a district centre with a middle market position. This ranking is a decline from 2003-04 where it was ranked 421.
- 6.5 Table 6.1 compares Catford's ranking to other major centres located in the sub region and shows that Catford has a much lower ranking than its competing centres. The table also compares the MHE rankings from 2003 and shows that Catford, Peckham, Woolwich and Bexleyheath have all declined in rank. Although the MHE Index has not been updated since 2008, we expect the ranking provides a broadly accurate measure of where Catford sits in relation to its competitors; this suggests potential for improvement.

Table 6.1 MHE Rankings

Centre	MHE 2003 Ranking	MHE 2008 Ranking
Catford	421	440
Eltham	281	271
Peckham	322	332
Brixton	452	350
Woolwich	220	274
Lewisham	165	156
Bexleyheath	143	149

Figure 6.1 Hierarchy of centres



- 6.6 In Table 6.2 below, we have reviewed the quantum of floorspace in the other major centres in South London according to the GLA Health Check (2009), which provides a useful benchmarking exercise. This GLA data can be used to compare centres, but caution should be taken when comparing it with local vacancy levels (i.e. the AMR), which use different definitions to the extent of the town centre. As a headline, it is notable that Catford has the least town centre floorspace and comparison floorspace of all ‘major centres’ as designated in the London Plan.

Table 6.2 Competing centres

Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Catford	11,131 (23%)	9,134 (19%)	6,940	6,081	13,805	47,091
Eltham	5,893 (11%)	27,430 (52%)	4,010	4,985	10,578	52,896
Peckham	21,590 (30%)	27,875 (28%)	6,120	5,575	11,787	72,947
Brixton	13,607 (19%)	31,072 (43%)	4,640	6,025	17,966	73,310
Woolwich	12,564 (17%)	30,644 (40%)	8,740	7,674	16,701	76,323
Lewisham	13,726 (15%)	50,212 (56%)	5,230	3,973	16,613	89,754
Bexleyheath	12,489 (13%)	49,247 (53%)	6,030	2,792	22,946	93,504

Source: GLA Health Check (2009)

- 6.7 Catford has a relatively small quantum of retail and leisure floorspace compared to other major centres in south London. It has a high proportion of convenience floorspace compared to the other centres with only Peckham having a higher proportion. Its proportion of comparison floorspace (19%) is however, significantly lower than that in the other benchmark centres – Peckham has the second lowest proportion with 28% and Lewisham has the highest proportion with 56%.
- 6.8 In Table 6.3, we undertake a further comparative analysis reviewing the amount of vacant floorspace in other major centres in South London.

Table 6.3 Vacant retail units – comparative analysis

Centre	Units	Vacant units	Vacant units (%)
Catford	256	27	10.5
Eltham	234	31	13.2
Peckham	395	34	8.6
Brixton	433	42	9.7
Woolwich	306	34	11.1
Lewisham	364	51	14
Bexleyheath	301	20	6.6

Source: GLA Health Check (2009)

- 6.9 Table 6.3 compares the number of vacant retail units in Catford to the benchmark centres. It shows that the percentage of vacant units in these centres varies significantly with

Catford falling centrally in the range. Lewisham has the highest proportion of vacancies (14%) and Bexleyheath has the lowest (6.6%).

Health check update

- 6.10 In our health check update, we broadly base our analysis on the vitality and viability indicators in the now cancelled PPS4 (due to the publication of the NPPF in March 2012). In this analysis, we consider the diversity of uses in the town centre, including vacancy level, and also review the overall environmental conditions and accessibility of the centre to provide a complete qualitative audit of the Catford town centre.

Diversity of uses

- 6.11 In Table 6.4 we present the diversity of use of retail and other town centre uses in Catford town centre. This is based on Experian goad floorspace data and consequently is based on the units included on the Goad Plan (attached at Appendix 2) rather than any planning policy definition of the town centre boundary, but is used to enable comparison with UK average floorspace splits.

Table 6.4 Diversity of uses summary for Catford town centre

Use Class	Units	F'space (sqm)	F'space (%)	UK avg (%)
A1 Convenience	42	12,065	27%	17%
A1 Comparison	46	14,020	32%	47%
A1 Services	35	3,040	7%	5%
A2 Financial & Professional	22	3,480	8%	7%
A3 & A5	47	6,465	15%	11%
Miscellaneous	2	340	1%	1%
Vacant	24	4,710	11%	12%
<i>Sub-Total Experian Retail</i>	218	44,120	100%	100%
Other floorspace	54	23,850		
GRAND TOTAL	272	67,970		

Source: Experian Goad 2012 & RTP site visit 2012 ('other floorspace' includes A4 pubs)

- 6.12 It is noted that Experian's definition of how much comparison floorspace in Catford in 2012 (14,020 sqm gross) is higher than the figure in the 2009 GLA Health Check (9,134 sqm gross, as specified in Table 6.2 above and also supplied by Experian). We expect the difference is due to a combination of factors, including the definition of the surveyed area and vacancy rates.
- 6.13 We now turn to consider the key outcomes of this diversity of uses analysis.

Convenience sector

- 6.14 Catford town centre has a strong convenience offer, with some 27% of the retail floorspace devoted to this use; this compares to the UK average of 17%. There are four supermarkets located in Catford, with the large Tesco providing the main foodstore offer in the Catford Centre, supplemented by Lidl, Aldi and Iceland.

Figure 6.2 Foodstores in Catford



- 6.15 There is also a smaller Tesco Express (within the Goad area, but outside the town centre boundary) and 36 other independent convenience stores. These independent stores include three bakers, three butchers, two fishmongers, one greengrocer and two newsagents. According to Goad data, the number of convenience units in the centre has also increased from 35 in 2009 to 42 in 2012.

Figure 6.3 Independent foodstores in Catford



- 6.16 The Tesco store anchors the Catford Centre, which is a partially covered shopping centre that acts as the focal point of the town centre. However the shopping centre is now very dated and offers very little in the way of quality comparison shopping. There are 20 units in total in Catford Centre, one of which is currently vacant but under offer.

Figure 6.4 Catford Centre



Comparison sector

- 6.17 The comparison offer in Catford town centre is limited with only 32% of the retail floorspace dedicated to this use; this compares to the UK average of 47%. Most comparison goods sectors are underrepresented in the centre, apart from chemists, toiletries and opticians, and DIY, hardware and household goods. There are also a few sectors that are not represented in the centre at all, such as menswear.
- 6.18 The majority of the comparison offer comprises of middle to discount retailers and whilst there are some national multiples, such as Argos, Boots and WH Smith, the majority of the comparison units are independent retailers. The centre includes only five out of the 31 Goad major retailers; Boots, Superdrug, Argos, Tesco and WH Smith.

Figure 6.5 Comparison offer in Catford



Service uses

- 6.19 The percentage of floorspace devoted to A1 services in Catford is 7%, which is just above the national average of 5%. The retail service offer is mostly made up of hairdressers and beauty salons, with 31 of these present in Catford town centre. There are also 4 laundries and drycleaners in the centre, making up the rest of the A1 service offer. The percentage of A2 floorspace in Catford is also slightly above the national average, and this offer consists mainly of banks and estate agents. There are also two pawnbrokers present in

Catford. Whilst there is a good provision of A2 units in the centre, according to Goad the number of A2 units has however dropped quite considerably from 34 in 2009 to 22 in 2012.

Figure 6.6 Service uses in Catford



Food and Drink

- 6.20 In terms of A3 and A5 uses, 15% of the retail floorspace in the centre is dedicated to these uses (compared to the UK average of 11%). This equates to 47 units, 17 of which are restaurants and 18 of which are takeaway shops. There are also 11 cafes in the centre. There are only three national food chains in Catford; Nando's, KFC and Macdonalds and the majority of the offer is made up of lower end, value outlets.

Figure 6.7 Food and drink uses in Catford



Vacant units

- 6.21 The percentage of vacant floorspace, from the Experian Goad data, at 11%, is similar to the UK average of 12%. However a number of these vacant units are large and prominent giving the impression that there are a higher number of vacant units in the town centre. The largest two units, at 840 sqm and 410 sqm are both on Rushey Green and are fairly prominent. One of these units was formerly a Blockbuster video store.
- 6.22 The rest of the vacant units range from 70 sqm to 350 sqm and are dispersed throughout the centre, with the exception of a cluster of six vacant units on Brownhill Road which are in poor condition. These units, owned by TfL, were acquired for road enabling works as part of

the long standing plan to realign the South Circular. Whilst the number of vacant units has declined by two since 2009, there are now more large vacant units (the largest in 2009 was 200 sqm).

Figure 6.8 Vacant units



Market

- 6.23 The town centre has two well-regarded markets at the Catford Centre and along the Broadway which has a range of stalls offering both convenience and comparison goods and contributes to the range of different shopping in Catford.

Figure 6.9 Market stalls



Environment

- 6.24 The town centre environment is varied; in parts it is modern and pleasant with well-kept shop frontages and green spaces, however in other parts shop fronts are run down and tired looking. Whilst the majority of shop fronts in Catford are well maintained, they are not particularly attractive due to the discount nature of the majority of units. The Catford Centre especially looks tired and dated and does not provide for a pleasant shopping experience.

Figure 6.10 Catford environment (1)



- 6.25 There are a number of pleasant, leafy, green open spaces with seating areas located along Rushey Green. However, the building stock in the centre is of mixed quality.
- 6.26 The volume of traffic flowing down the road has a detrimental impact on the environment. There are also a few vacant run down units along this road which again have a detrimental impact on its environment.

Figure 6.11 Catford environment (2)



- 6.27 The presence of traffic throughout the centre is a particular negative for Catford and despite the presence of pedestrian crossings it is still quite difficult crossing from one side of the centre to the other.

Civic/Cultural Functions

- 6.28 Catford is home to a strong civic function, with the main LB Lewisham offices located in the centre. Civic and cultural functions include Lewisham Town Hall, Catford library, the Broadway Theatre; also Kaleidoscope Centre for children and young people, and a number of places of worship. The Civic Centre is a great asset for Catford as it brings workers and residents to the centre and is a reason to visit the centre, other than for shopping.

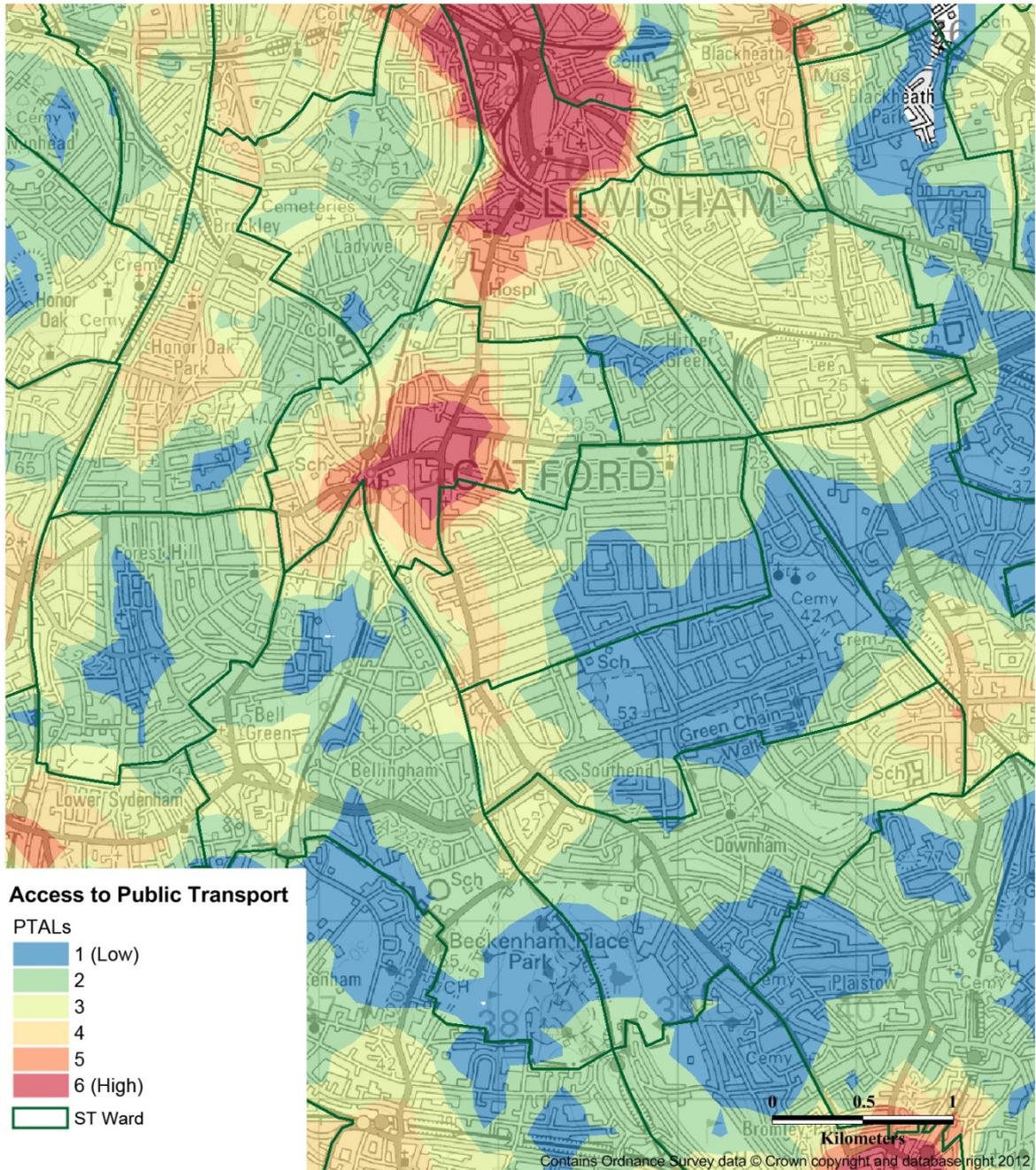
Figure 6.12 Civic and cultural function in Catford



Transport/Accessibility

- 6.29 The centre has very high accessibility via public transport, with two train station serving the town centre, linking it with central London and other local areas. Journey times by train from Catford Bridge station into central London are 20 minutes (Charing Cross) and from Catford Station, 23 minutes (City Thameslink).
- 6.30 There are also a number of bus stops located throughout the centre and there are a high number of services providing frequent connections to local destinations such as Lewisham, Blackheath, Croydon, Central London and Stratford. Figure 6.13 below shows the PTAL levels for Catford and the surrounding area and shows that Catford town centre has the highest PTAL level available.

Figure 6.13 PTAL Catford



- 6.31 The centre is also accessible by private car, and there are four car parks in the town centre – a multi storey car park adjacent to the Catford Centre (224 weekday spaces and 690 weekend spaces), a 187 space car park at Catford Island Retail Park, a 67 space car park at Thomas Lane and a further car park serving Aldi (110 spaces). There is also a 115 space car park adjacent to the town hall which is available to the public on Saturdays and Sundays.

Retailer requirements

- 6.32 There are only two retailer requirements listed for Catford on the FOCUS database – one from Card Factory and the other from Talrius Plc/Quicksilver, an adult gaming centre. This compares to 9 recorded retailer requirements in 2009. This decline in the number of retail requirements is not unexpected due to the recession. However, as a major centre, it would be expected that there would be more retailer requirements listed. However if a new shopping centre did come forward, it is anticipated that this could attract new retailers requirements above those currently listed.

Out of centre floorspace

- 6.33 In terms of out of centre floorspace, Ravensbourne Retail Park is also located on Bromley Road and the retail units located there include Curry's, PC World, Harvey's, Carpet Right and Comet. A planning application was recently submitted to extend the range of goods that could be sold from the retail park, however it was refused permission. This application was the subject of an appeal, which the Council won.
- 6.34 There is also an out of centre Sainsbury's located at Bell Green and there is also planning permission for an additional 13,000 sqm of non-food retail and 10,000 sqm of B employment space at this location.
- 6.35 At the Greyhound site there is a commitment to 508 sqm gross of retail floorspace.
- 6.36 We also understand that pre application proposals have also been drawn up for the redevelopment of the Leegate Centre, in Lee Green. The proposals include a new Asda supermarket, alongside other shops, apartments, a hotel and fitness facilities.

SWOT Analysis

- 6.37 The 2009 RCS undertook a SWOT analysis of Catford and we have updated this based on the findings from our own healthcheck. Unsurprisingly, the role and function of Catford today is very similar to how it was in 2009 and therefore the SWOT analysis remains largely unchanged from within the RCS. However, for completeness, we produce an updated SWOT exercise at Table 6.5.

Table 6.5 Update of SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Good provision in the convenience goods sector; ▪ All types of services in Catford are above the national average in terms of floorspace which they occupy; ▪ Strong civic role; ▪ Contains a good number of independent retailers. ▪ Good public transport ▪ CRPL ownership of Catford Centre 	<ul style="list-style-type: none"> ▪ Poor environment/appearance; ▪ Comparison provision in the centre is significantly below the national average; ▪ Lack of representation in many of the comparison goods sectors; ▪ High number of discount retailers; ▪ Number of prominent vacant units; ▪ Lack of demand for space (retailer requirements). ▪ Lack of large-format retail units could prevent new national multiples locating in the centre
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Regeneration/redevelopment of the Catford Centre; ▪ Improvements to the environmental quality of the centre; ▪ Bringing vacant units back into use; ▪ Diversifying the retail offer of the centre particularly in the comparison goods sector; ▪ Building on the civic role of Catford. ▪ Night time economy ▪ Road network improvements working with TfL 	<ul style="list-style-type: none"> ▪ Lack of investment in the centre or in new retail floorspace; ▪ Increased competition from nearby centres and out of centre developments; ▪ Increase in internet sales; ▪ Decline in spending associated with the credit crunch/recession.

Summary

- 6.38 Catford town centre currently has a weak comparison role. There are very few GOAD key attractors located in the centre, and there are also no listed retail requirements from comparison retailers. The centre's MHE ranking has also declined since 2003 and 2004, and is much lower than other Major Centres located in South London.
- 6.39 The majority of the retail units in the centre are small and fail to meet the needs of national retailers who want more space. There are also too many small units that are failing to meet the current demand for larger units.
- 6.40 The environment of the centre is also poor in places, with unattractive buildings and shop frontages. The heavy traffic running through the centre also has a detrimental impact on the environment of the centre and the busy roads make the centre quite difficult to navigate which detracts from a good retail circuit. Solutions to these issues are being explored with TfL as part of the regeneration programme.

- 6.41 In conclusion, while Catford town centre has the potential for positive change, as of today it is:
- Weakening as a comparison centre;
 - Weakening in relation to peer or competing centres;
 - Dominated by too small units (historical) causing a failure to meet potential demand from multiple retailers;
 - Suffering from the impact of through traffic; and
 - Suffering from a poor environmental image.

7 QUALITATIVE RETAIL NEEDS IN CATFORD

7.1 The NPPF states that when assessing the needs for land or floorspace for economic development, both the quantitative and qualitative needs should be taken into consideration. The PPS4 Practice Guidance is still relevant and provides detail on what represents qualitative need. Since it is a subjective concept, a number of factors can apply but the guidance outlines five frequently identified factors, namely:

- Gaps in existing provision
- Consumer choice and competition
- Overtrading
- Location specific issues
- Quality of the existing provision

7.2 Assessments of qualitative need should take these factors into account. We draw on our healthcheck work (reviewed at section 6), the previous household survey results and spending patterns, the quantitative findings on turnover and data from the Indices of Multiple Deprivation.

Gaps in existing provision

7.3 The spending patterns derived from the household survey indicate that Catford has a relatively low comparison goods market share in its zone compared to other major centres; however it does also have a low amount of comparison floorspace. Therefore the centre is performing relatively well given the limited comparison that exists. If the amount of comparison floorspace in the centre increased then we think that Catford's market share would also increase.

7.4 In terms of the convenience sector, Catford is only attracting 13.1% of the total convenience expenditure available in the catchment area; therefore there is an opportunity to increase the convenience goods market share of the catchment, clawing back trade to the centre.

Consumer choice and competition

7.5 Catford town centre consists mainly of independent retailers, with very few national multiples retailers. Only five of Goad's 31 major retailers are present in the centre. Overall, the comparison offer in the centre is weak as it has very few key attractors and consists mainly of low value and discount retailers. Therefore we consider that there is a qualitative opportunity for Catford to improve its comparison retail offer in order to revitalise the centre, maintain its vitality and viability, and thus improve consumer choice for local residents.

7.6 Convenience provision in Catford is more diverse, with three supermarkets and numerous independent convenience retailers such as butchers and greengrocers. Whilst the provision is good, the supermarkets the Lidl and Aldi provide a budget offer, whilst the Tesco is located in a dated building of restrictive size. Therefore there may be scope to improve consumer choice for local residents by introducing an improved convenience offer.

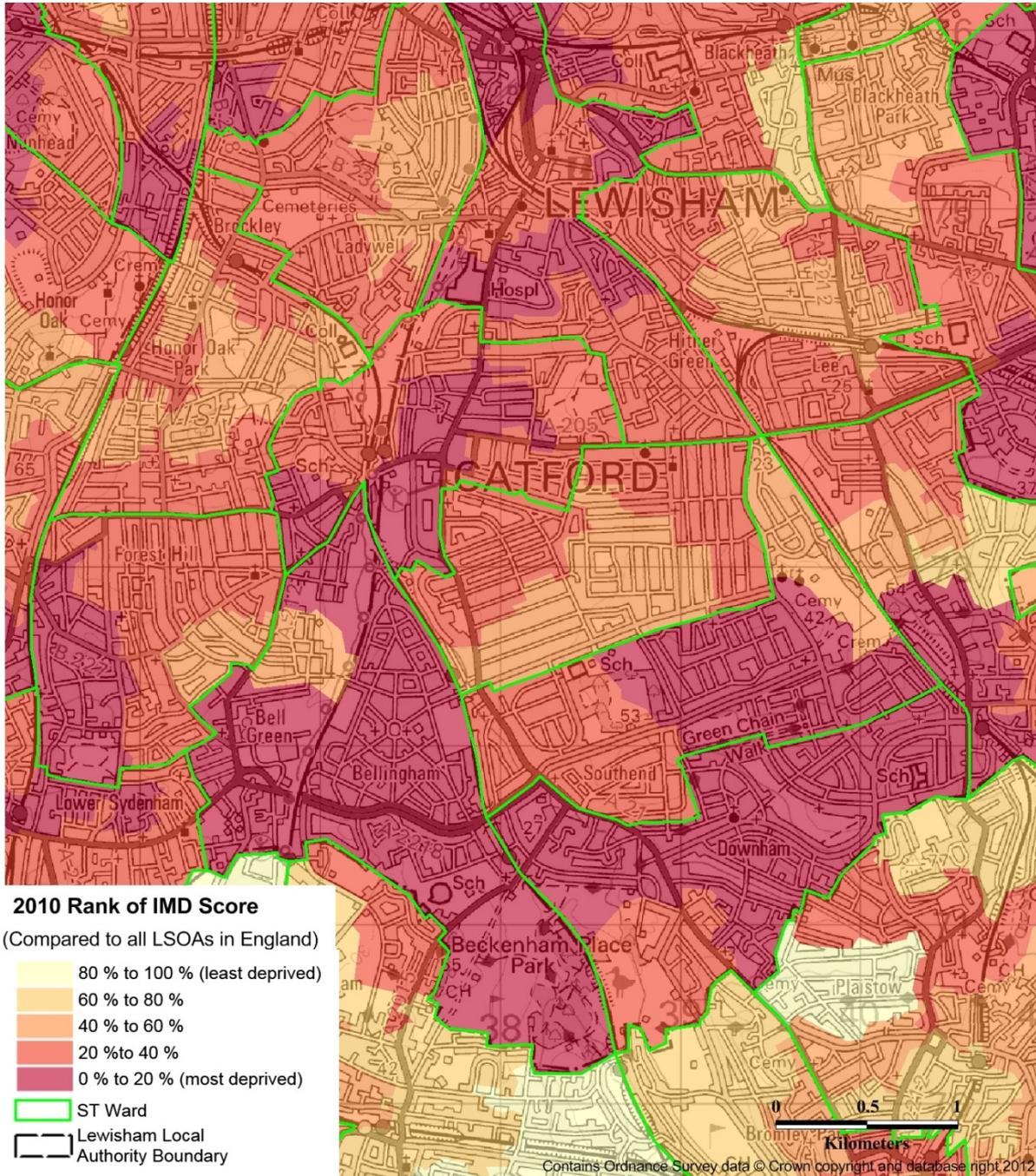
Overtrading

- 7.7 In the comparison sector, the existing floorspace in Catford is overtrading by about 13%. In the convenience sector, the quantitative need assessment suggests that foodstores in Catford are under trading very slightly, with the Tesco store under trading by about 9%. However, a visit to Catford showed that the Tesco store was busy, with evidence of over trading such as low provision of some stock, queues at checkouts and congestion in the aisles. This may be attributed to the dated format of the Tesco, rather than any quantitative needs generated by comparing an implied survey derived turnover and a national benchmark.
- 7.8 Therefore, we consider there is a qualitative need for an improved convenience goods offer, potentially through the extension, reconfiguration or redevelopment of the existing Tesco store.

Location specific issues

- 7.9 The Practice Guidance refers to location specific needs and states that the Indices of Multiple Deprivation (IMD) provide useful measures of deprivation. The NPPF states that LPAs should assess locations of deprivation which may benefit from planned remedial action. Therefore it is important to understand the IMD for the local geography and its relationship with any qualitative deficiencies, such as a lack of access to certain shops or services.
- 7.10 The IMD 2010 is based on the small area geography known as Lower Super Output Areas (LSOAs) and is the most recent dataset available. Each LSOA has between 1,000 and 3,000 people living in it with an average population of 1,500 people. There are 32,482 LSOAs in England. The LSOA ranked 1 by the IMD 2010 is the most deprived, and that ranked 32,482 is the least deprived. Within each LSOA deprivation is measured by seven measures or indicators known as domains. These seven indicators are then weighted and aggregated into summary measures of deprivation. These comprise:
- Income deprivation
 - Employment deprivation
 - Health deprivation and disability
 - Education, skills and training deprivation
 - Barriers to housing and services
 - Living environment deprivation
 - Crime
- 7.11 An IMD heat map is presented at Figure 8.1.

Figure 8.1 IMD Heat Plan



- 7.12 Catford town centre lies within the Rushey Green ward and from the map we can see that the LSOA's in this ward lie within the 40% most deprived in the country and much of the town centre area is covered by LSOA's that are in the 20% most deprived in the country.
- 7.13 The map also shows that much of the surrounding area to Catford lies in LSOA's that are within the 60% most deprived in England and that there are particular pockets of deprivation to the south and south east of Catford, as well as some to the north. In particular, Bellingham, Whitefoot and Downham wards to the south of the town centre have many LSOA's in the 20% most deprived.
- 7.14 However three of the wards surrounding Catford, Crofton Park, Catford South and Ladywell, do not have any LSOA's in the 20% most deprived in the country.
- 7.15 Whilst Catford Town Centre is in an area of deprivation, it is relatively well provided for in terms of its convenience offer. The comparison offer is however weak, therefore arguably the area could benefit from additional comparison goods floorspace locally to reduce the need for residents to travel long distances to undertake comparison goods shopping.

Quality of provision

- 7.16 The quality of the existing retail floorspace in Catford and its surrounding environmental quality is generally poor. Overall the centre is dated in appearance with a mix of architectural styles. Some areas of the town also suffer from poor quality buildings and shop frontages.
- 7.17 There is a sharp qualitative deficiency of good quality retail space in the centre as the majority of the units are dated and small in scale. Therefore there is a real opportunity to provide larger, modern retail units that will appeal to national multiples and help meet the qualitative deficiency in respect of the quality of floorspace.
- 7.18 Overall Catford does not offer a pedestrian friendly environment for shoppers, has poor connectivity and there is a qualitative opportunity to improve the overall experience for shoppers in the centre.

Summary

- 7.19 We have applied our findings to the five accepted qualitative indicators, we found that:
- Patterns of local spending indicate that Catford has a relatively low comparison and convenience market share, therefore there is an opportunity to increase this market share and claw back expenditure to the centre.
 - Comparison shopping in Catford is very limited, with very few Goad key attractors and a mostly low to discount retail offer, which restricts consumer choice. Therefore there is a qualitative opportunity to improve the comparison offer.
 - The convenience shopping provision in Catford is generally good; however two of the foodstore operators are discount retailers, therefore there is an opportunity to provide a higher quality foodstore to improve consumer choice.
 - There is evidence that the comparison floorspace in Catford is overtrading, however the convenience floorspace is broadly in equilibrium.

- The IMD indicates that the Borough as a whole is relatively deprived and Catford town centre is in one of the more deprived wards in the Borough. This area has good access to convenience floorspace but poor access to comparison floorspace.
- The quality of the retail offer in the centre is quite poor, with a lack of large, modern retail units. Therefore there is scope to improve the quality of the offer, as well as improving the quality of the environment.

8 ASSESSMENT OF COMMERCIAL LEISURE AND OTHER USES

Overall methodology

- 8.1 This section consists of an assessment of the quantitative and qualitative needs likely to arise in the leisure sector, or other town centre uses, in the period up to 2026. As previously mentioned, it is important to note the caveat inherent in assessing the leisure sector in particular, namely that the techniques used to determine leisure needs are not as well developed as those utilised in assessing retail needs. Nevertheless, we use practical resources and effective methodologies to assess this sector Catford as robustly as possible.

Leisure expenditure growth

- 8.2 Experian provides data on per capital leisure expenditure in Classification of Individual Consumption by Purpose (COICOP) categories. We use this resource and apply a simple approach to determine a broad level of demand and scope for additional leisure facilities. We begin by considering the current breakdown of leisure expenditure by COICOP in the catchment area (which is assumed to be the same as the retail catchment in Figure 7.1) as shown in Table 9.1.

Table 9.1 Breakdown of Leisure Spend in Study Area (2009)

Expenditure category	Exp. (£m)	Split (%)
Accommodation services	19.5	5.0%
Cultural services	53.8	13.8%
Games of chance	20.8	5.4%
Hairdressing salons and personal grooming establishments	15.1	3.9%
Recreation and sporting services	22.4	5.7%
Restaurants, cafes etc....	257.6	66.2%
TOTAL	389.2	100.0%

Source: Tables 8a and b, Appendix 1

- 8.3 The table shows that total spend on leisure services per capita in the study area amounts to £389.2 million, of which more than half accrues to spending on 'restaurants, cafés, bars, etc.' (66.2%). The second highest leisure expenditure is on 'cultural services' (13.8%). Betting accounts for the greatest proportion of 'games of chance' expenditure (36.5% in 2007, according to the Leisure Industries Research Consultancy).
- 8.4 Apportioning leisure expenditure in the COICOP categories provides us with the structure of current expenditure on leisure activities. We are able to use this current structure to calculate the growth in leisure spending by residents of the study area in the period 2009-2026. The projected growth in expenditure on leisure services is set out in Table 9b (Appendix 1) using Experian's recommended growth rate for spending on leisure services of 0.8%, per capita, per annum for the period 2009 to 2026.

- 8.5 As can be observed on Table 9b, Appendix 1, *total* expenditure on leisure services is projected to increase from £389.2 million in 2009 to £491.7 million in 2026 in the study area. In Table 9.2 we apply the current proportions of leisure spend to determine the expected change in each COICOP category.

Table 9.2 Allocating growth in spending by COICOP categories

Expenditure category	Growth (£m)	Split (%)
Accommodation services	5.1	5.0%
Cultural services	14.1	13.8%
Games of chance	5.5	5.4%
Hairdressing salons and personal grooming establishments	4.0	3.9%
Recreation and sporting services	5.9	5.7%
Restaurants, cafes etc....	67.8	66.2%
TOTAL	102.4	100.0%

- 8.6 Spending on ‘restaurants, cafés, bars, etc’ is expected to increase by £67.8 million across the study area and represents the highest expenditure category. Expenditure on ‘accommodation services’ and ‘cultural services’ is forecasted to be approximately £5.1 million and £14.1 million, respectively, based on current spending proportions.

Existing facilities and evidence of demand

A3, A4 and A5 floorspace

- 8.7 Catford is reasonably well provided for in terms of eating and drinking establishments. Our diversity of use analysis shows that the proportion of floorspace dedicated to eating establishments in Catford is 15%, which is slightly higher than the UK average of 11%.
- 8.8 In total there are 47 A3 and A5 units and eight drinking establishments. The eating establishments consist of 18 takeaways, 17 restaurants and 11 cafes. The majority of these are independent operators, with only three national chains (McDonalds, Nando’s and KFC) present in the centre. The drinking establishments in the town centre consist of four pubs and four bars.

Cinemas and theatres

- 8.9 There are no cinemas in Catford town centre; therefore residents have to travel to cinemas elsewhere. There is, however, a theatre in Catford town centre, the Broadway theatre, which sometimes shows films.

Gyms and Leisure Centres

- 8.10 The catchment area appears to have an adequate provision of gyms and leisure centres as there are 14 such facilities. These vary in terms of the quality and type of activities offered and details are given in Table 9.4 below. Of these 14 gyms, four are located in Catford itself.

Table 9.3 Gyms and Leisure centres in the study catchment area.

Gym/leisure centre	Location	Type	Facilities
St Dunstons Sports Centre	Catford	Private	Indoor pool, sports hall, tennis and netball courts, gym, football pitches
Skyline Gym	Catford	Private	Gym
Ladywell Arena	Catford	Public	Gym, athletics track
Power for Life Gym	Catford	Private	Gym, fitness studio
Ladywell Leisure Centre	Ladywell	Public	Group exercise studio, gym, swimming pool
Fitness First	Lewisham	Private	Gym, fitness studio, spin studio, beauty room, steam room
Lucky's Gym Ltd	Lewisham	Private	Gym
LA Fitness	Sydenham	Private	Gym, fitness studio pool, sauna, steam room
The Bridge Leisure Centre	Sydenham	Public	Gym, exercise studio, activity rooms, indoor badminton courts, indoor cycling studio, multi-use courts, sports hall, squash courts, swimming pool
Metro Flex Gym	Sydenham	Private	Gym
Bellingham Leisure & Lifestyle Centre	Bellingham	Public	Gym, studio, outdoor facilities
Downham Health & Leisure Centre	Downham	Public	Swimming pool, studio, gym, community hall, health care facilities, library, badminton courts, indoor and outdoor pitches
Fit4less	Bromley	Private	Gym
TruGym	Bromley	Private	Gym

Indicative floorspace need for A3-A5 uses

- 8.11 As explained above, £67.8 million of expenditure growth is allocated food and drink uses for the A3, A4 and A5 use class categories. Using an indicative market share of 9.3%, we have converted the anticipated growth into an indicative floorspace requirement based on turnover which we have forecast to increase by 0.4% per annum to 2026. The indicative level of quantitative need (gross floorspace) for the borough up to 2026 is presented in Table 9.4.

Table 9.4 Quantitative need for A3, A4 and A5 uses (gross sqm)

Scenario	2012	2016	2021	2026
Gross – CMS – sqm	140	661	1,174	1,870
Gross – EMS – sqm	140	1,187	1,727	2,450

Source: Table 10a and b, Appendix 1 (all figures presented are cumulative)

- 8.12 This demonstrates that in Catford, there is scope by 2021 for over 1,174 sqm gross of additional A3, A4 and A5 floorspace, increasing to 1,870 by 2026 under a constant market share. This would be higher at 2,450 sqm gross should an enhanced market share be adopted. It is expected that this floorspace would be developed alongside a retail led scheme to form a mix of uses, although this floorspace is likely to be predominantly in A3/A4 Use Class since planning policy restricts the scope for additional A5 uses in the town. There may also be scope for a small amount of this growth to be achieved through the change of use of existing premises or standalone developments.

Gap analysis

Cinemas

- 8.13 Cinema operators make decisions of expansion or location based on ‘screen density’ – that is, the existing provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes (as defined by Caviar). Although this is less relevant in London, as a proxy we have therefore analysed cinema provision within an 18-minute drive time of Catford town centre.
- 8.14 There are no cinemas in Catford town centre itself, however within an 18 minute drive time of Catford there are six cinemas. These are located in Greenwich, North Greenwich, Bromley and Beckenham. As Table 9.1 shows, after calculating the population of the 18 minute drive-time as 619,926 this equates to 8.1 screens per 100,000 people, which is above the UK average. This indicates that in the wider area, there is sufficient cinema provision for the local population on the basis of quantitative analysis.

Table 9.5 Cinema Screen Densities

	Cinemas within 18 minute drive time	No of screens within 18 minute drive time	Population within 18 minute drive-time	Screen Density (screens per 100,000 people)	UK Average Screen Density
Catford	6	50	619,926	8.1	6.4

- 8.15 Despite there being no firm evidence of quantitative need that would suggest a policy response is required to meet a cinema need in the wider catchment, decisions on whether

to attract a cinema to Catford should not be based solely on screen density since it is a rather blunt tool as it does not take into more local regeneration opportunities. A cinema does often attract footfall and be a mechanism to enhance and develop the food and drink offer in Catford, by developing its evening economy. As Catford is well provided for in terms of public transport, it would also be a good location for such a use.

- 8.16 Therefore, in light of the above, should it be possible to introduce a range of leisure uses to include a cinema in the town centre, this should be encouraged as part of a mix of uses, subject to any policy aspiration being consistent with wider Borough wide strategies (such as Lewisham). A cinema within Catford could act as a catalyst to attract further food and drink operators that could meet the qualitative gap in provision as explained above.

Gyms

- 8.17 Business in Sport and Leisure (BISL) handbook 2009 states that around 12% of the UK population is a gym member. The population in the catchment area is estimated to be 217,826. Assuming gym membership to be in line with national averages, there are 26,139 gym members in the catchment area. There are 14 health and fitness facilities in the catchment area; therefore on average each facility has 1,867 members.
- 8.18 The BISL handbook states that at March 2008 there were 5,755 private fitness facilities in the UK and 7.2 million of the population held a private membership, meaning an average private health club has 1,251 members. Although the report contained no membership information for the 2,622 public fitness facilities, we see no reason it would differ radically and therefore assume 1,251 to be a reasonable benchmark membership for any given gym. We calculate, therefore that the current facilities in the catchment are very slightly oversubscribed and its capacity for additional provision should a suitable site be available.

Summary

- 8.19 Our assessment of leisure need has considered broad quantitative needs (through expenditure growth) and qualitative needs through a consideration of the existing offer and a gap analysis. It should be emphasised that assessments of leisure need are less evolved than those for retail and thus our findings should be treated sensitively. In summary, we have found that:
- There is an opportunity for an enhanced food and drink offer in Catford to meet quantitative and qualitative needs in order to provide an improved choice and better evening economy
 - There is no clear cut quantitative need for a new cinema in the wider area, but due to lack of cinema facilities in Catford and subject to policy aspirations being consistent with other Borough-wide objectives, a cinema could be used to increase footfall as part of other regeneration initiatives in the town centre and attract new food and drink uses to the town
 - There is scope for a gym in the town centre – likely to be a budget offering, in order to provide competition to other provision in the surrounding area

9 CATFORD ECONOMIC DEVELOPMENT ACTION PLAN

Introduction

- 9.1 In this Section, we draw together the findings of Sections 1-9 into an Economic Development Action Plan. We first summarise the role of Catford with reference to its strengths, weaknesses, opportunities and threats, before outlining potential policy interventions that could contribute to an economic development action plan. Taking these policy interventions, we convert out advice into a set of condensed actions by priority, plausibility and impact.
- 9.2 Our overall perspective is that Catford can certainly change for the better, particularly as the Council's positive planning frameworks and proposed capital projects including redevelopment of the Catford Centre, public realm works to Catford Broadway and improvements to the road network can combine to deliver significant change.

Existing and future role of Catford

- 9.3 Catford has a strong convenience offer and a complementary market. It is a Major Centre in the London Plan, is the second largest centre in the Borough and has good accessibility by rail, bus and car. It has the potential for significant improvement. But Catford has current weaknesses – such as intrusive traffic, the generally poor environment and the limitations of its retail stock. It requires positive Council – including planning policy - interventions, hand in hand with active town centre management, to ensure it again becomes a thriving town centre in fifteen years time.
- 9.4 Catford is not immune from the macro-economic forces that are impacting all physical shopping destinations, such as limited consumer expenditure and the rise of e-tailing. These suggest that the centre will have to work hard to stay still and could benefit from greater concentration and an improvement in quality to ensure it remains competitive. Using 'Portas' terminology, there are some weaknesses that can be addressed in policy:
- **Experience:** The positive aspects of the market and local culture can be exploited, but the impact of traffic, the town's limited comparison offer, poor connectivity and generally poor environment must be addressed.
 - **Service:** Many commentators believe that good/great service will be the differentiator between survivors of the recession and those who fall by the wayside. Already we see too many value shops, while the fresh produce shops and market seem to be offering a distinctive service to a section of the community.
 - **Specialism:** The market and fresh food shops, as well as the many Afro-Caribbean retail and catering outlets, where independent retailers dominate give the centre a distinctive flavour. This 'flavour' needs to be exploited (see later) but it will not be enough to halt the centre's decline. What is needed is investment in new comparison shopping while retaining the centre's distinctive flavour.
- 9.5 Overall, we see potential amongst the centre's intrinsic strengths and site opportunities to enable the decline to be halted and for a renaissance in its vitality and viability to be achievable. While we do not see Catford as being able to assert such a recovery in its

fortunes that it will become major destination for comparison goods to compete with metropolitan centres, we do expect the centre to continue to play to its convenience strengths (in the short term at least) combined with its existing civic function and an enhanced leisure and evening economy. The comparison goods offer could be improved, but this will require a critical mass of new development attracting larger units attractive to national operators.

Quantitative and qualitative needs

- 9.6 In Sections 7, 8 and 9 in this report, we have thoroughly appraised the need for additional retail and other town centre floorspace in Catford. We have identified scope to increase Catford’s market share, by attracting further spending from the southern part of the catchment area. This will primarily be achieved by providing additional floorspace, but will also be achieved by making existing floorspace trade at higher levels.
- 9.7 In our capacity assessment, we have assessed the needs on both a constant market share and enhanced market share basis. Since there are sites available for development, to be outlined in the Local Plan, and there is a realistic opportunity to ‘claw back’ spending, it is our recommendation that the Council should target the enhanced market share, in order to deliver a step change in the profile and performance of Catford town centre.
- 9.8 To assist the Council in plan making and considering options for its development sites, we have presented the needs for additional retail floorspace, alongside other A class uses so that the Council can understand the land take necessary for a balanced mix of uses to be delivered to serve the whole community. These needs are presented at Table 10.1 and are based on an enhanced market share and are on a gross basis to 2021 and 2026 (on a cumulative basis). The analysis behind this data, including net outputs, is presented at Appendix 1.

Table 10.1 Potential Enhanced Market Share Policy Outcomes for A Use Classes

Category of floorspace	2021 - Enhanced market share (sqm gross)	2026 - Enhanced market share (sqm gross)
A1 Comparison floorspace	5,700	8,100
A1 Convenience floorspace	1,400	1,800
A1 Service/A2 Floorspace	1,000	1,400
A3,A4 & A5 Floorspace	1,700	2,400
TOTAL	9,800	13,700

- 9.9 This evidence suggests that Catford could achieve an additional 9,800 sqm gross of town centre floorspace by 2021, increasing to 13,700 sqm gross by 2026. However, as well as the quantitative need, we have reviewed qualitative evidence on both retail and leisure uses in the town. Our key findings are as follows:
 - The quality of the retail and leisure offer in the centre is quite poor, with a lack of large, modern retail units (i.e. 500 sqm or more) and thus there is scope to improve the quality of the offer, as well as improving the quality of the environment to improve Catford’s market share

- Subject to policy aspirations being consistent with other Borough-wide objectives, we see scope for a new multiplex cinema, which could be used to increase footfall as part of other regeneration initiatives in the town centre and attract new food and drink uses to the town
- There is scope for a gym in the town centre - likely to be a budget offering, in order to provide competition to other provision in the surrounding area

9.10 The 13,700 sqm gross need for additional A1-A5 floorspace by 2026 is a capacity derived output based on a realistic enhanced market share. Although it is not based on any physical capability of sites to accommodate growth, the increase in market share does reflect the opportunities for development and the ability to provide a critical mass of shopping floorspace in the town. This need figure is lower than the existing 22,000 sqm gross target in the Core Strategy and is based on a more fine grained assessment on the needs for Catford assuming that a step change in the centre's profile can be achieved and an increase in market share delivered. This floorspace need is for the whole of Catford, although we expect it to be focused on key sites (as explained below).

9.11 The need identified is consistent with Catford's role as a major centre and an opportunity for regeneration. It should be accommodated within the town centre to ensure compliance with the NPPF requirement for policies to be positive and promote competitive town centre environments. The sequential test prioritizes sites in the town centre and thus accommodating this floorspace in town centre sites would meet this test. However, should the Council receive applications for retail uses that meet this need on the edge of Catford or on out of centre sites, it should insist that the applicants apply the sequential test.

Summary of opportunities for Catford

9.12 The report has identified a number of opportunities for Catford, which are summarised as followed:

- Catford has the smallest amount of comparison floorspace of all the major centres defined in the Local Plan therefore there is an opportunity to increase its comparison offer;
- Catford has a relatively low comparison and convenience market share, therefore there is an opportunity to increase this market share and claw back expenditure to the centre;
- In order to improve Catford's market share there is an opportunity to improve the quality of the retail offer in the centre by providing larger modern retail units, as well as improving the quality of the environment.
- There is also an opportunity to improve the leisure and evening economy of Catford to provide improved choice and increase footfall in the centre.

Advice on policy interventions

9.13 We now turn to look at potential interventions that could contribute to an Action Plan, which we split into capital projects, improved connectivity and town centre management. These interventions could be both through planning policy (i.e. the Local Plan) and through the Council's role as a land owner and scheme promoter.

Capital projects

9.14 It is in the Council's power to provide planning policy support to town centre schemes through its Local Plan and through its land holdings can assist in delivering new development. Consequently, we have focussed on four main town centre-related sites that we have listed in order of priority for delivery:

- i. Catford Centre
- ii. Town Hall
- iii. Laurence House
- iv. Plassy Island

9.15 We explore phasing and how each site can accommodate needs in the following sections. However at the outset, it is our recommendation that the majority of the needs for town centre floorspace should be achieved on the Catford Centre site (as explained below). We expect this site will absorb much of the need to 2021, with the other sites potentially absorbing the growth between 2021 and 2026 as longer term options.

i. Catford Centre

9.16 The redevelopment of this tired, brutalist, development will do the most to energise Catford and improve its retail offer. The objective here is to achieve a step-change in the quantity and quality of multiple retailers in the town centre, complemented by an improved leisure and evening economy.

9.17 In these challenging times a simple scheme that is deliverable and meets the key priorities of:

- A main anchor (food is the most likely)
- Big box units (with mezzanines if appropriate)
- Some leisure, if possible (cinema and restaurants), on upper floors
- Sufficient parking – say 600 spaces
- Good connectivity to Rushey Green

9.18 It is appreciated that the space for new retail floorspace at the ground floor is restricted and the increase in retail floorspace may not fully meet all the need forecasts for the town. However, that said, we expect some of the expenditure capacity will be absorbed by the floorspace trading at higher levels than the existing space (and thus still increasing market shares). Also over time we expect opportunities to deliver mezzanine floorspace to increase the overall level of retail space on the site, which would also absorb the identified need.

9.19 It is our view that the Catford Centre development is a critical to delivering change in the town centre and may well be the catalyst to deliver other key capital projects in the town. An improved environment, with a successful balance between national multiples and thriving independents alongside an enhanced leisure offer and evening economy will increase the profile of the centre.

9.20 Due to the importance of this site for the regeneration of the town centre, we suggest that the Council insert a mechanism in its Local Plan that seeks to ensure that sites the

investment potential for this site is protected to ensure the best prospects for delivery in the Plan period.

ii. Town Hall

- 9.21 The Town Hall complex sits in the middle of the retail heart of Catford, yet its contribution to the vitality of the town centre is quite negative in that it has no active frontages, particularly affecting the attractiveness of the Broadway and the market. However its citizen-facing services are important and the working population supports the town centre.
- 9.22 We would strongly recommend that the ground floor layout of any new office development on this site be carefully considered to ensure maximum permeability. In our view, the Catford Broadway frontage needs to be active, in the form of small shops or cafes and so strengthen the appeal of the market, which should also become traffic free. This is in line with the Council's public realm improvements planned for Catford Broadway.
- 9.23 On the Catford Road side, the Library needs to have a far more active frontage, say than the present one (in Laurence House). The open spaces at either end of the Broadway would benefit from enlivenment possibly with pavilions for street cafés or similar, so as to avoid bland open areas.

iii. Laurence House

- 9.24 The future of this site is not seen as retail; nor should it necessarily have a significant active frontage to Catford Road (as presently aligned). But it could offer a number of benefits to the town centre, especially if the main traffic route moves south:
 - Providing a better South Circular alignment which would allow the area around the Town Hall/Theatre block to become a pedestrianised environment; if so, the northern ground floor frontage should be retail/catering
 - The creation of some new civic spaces that could host events.
 - The inclusion of a statement residential building to give the centre more focus and identify
 - An increase in the local residential population (added to the other main residential sites); this could also broaden the demographic profile of the centre's immediate, walk-in catchment

iv. Plassy Road Island

- 9.25 The value of this site is both (or possibly either):
 - As a land mass to provide further quality complementary retail and leisure uses, in the longer term; and/or
 - As a retail function that can add to the attractions of the wider town centre (at present it operates somewhat in isolation, partly due to the very poor linkages and partly to the free surface parking).
- 9.26 Our recommendation here is to secure better connectivity in the short-term; acquisition of properties adjacent to the current links. And to allocate the land for longer-term redevelopment in a more integrated format for a mix of uses. That might include the Timber

Yard or other adjacent land. The Council should seek to acquire an interest that can be used to influence the shape of future development.

Other related actions

- 9.27 We have deliberately not focused on other non-retail-related projects, such as the Greyhound Stadium site and the Railway Station sites possibilities. We understand these will be mainly residential-led projects. However, from our perspective, these projects will be important supporting developments that:
- Improve the perception of Catford as a residential area;
 - Improve the linkages with the town centre;
 - Add to the local walk-in catchment population; and
 - Improve the arrival experience.
- 9.28 We have not seen the Wickes Site as a priority for action, given its location. But we can see some benefits from improving its connectivity with the town centre. As a site, it is not part of the town centre and we see no immediate need for its redevelopment; nor is there likely to be much incentive to do so in the current climate. It can play its part in the medium or longer term as indicated in the AAP Preferred Options (2007) and which we support. However this is not a suitable location for the provision of large scale convenience floorspace.
- 9.29 The route from the stations into the town centre suffers from being one sided. And the difference in levels on the south side does not help. But in the medium term it would assist the centre if the green space could be “incorporated” in some way – especially to the east – into the urban domain, so that it reads as part of the edge of the town centre, rather as something distinct and separate. This may become achievable if the South Circular is re-routed.

Connectivity and public realm improvements

- 9.30 The second main theme is the need to increase the retail performance of the centre by enhancing the “retail circuit” and the quality of the public realm. This will also significantly improve the experience of shopping in Catford. We recommend that a range of topics for such improvement be explored, as follows:
- i. Traffic management and calming – the impact of traffic intrusion needs addressing.
 - ii. Surface treatment upgrade - much as suggested by BDP on Broadway, as much of the present surfaces are either poor or lack any distinctive for the town centre
 - iii. Street furniture – a consistent and distinctive family of contemporary furniture would add to the centre’s distinctiveness.
 - iv. Crossings - in a number of important places, the present ones do not support the retail function, for example on leaving the Catford Centre, to cross the road. And the Catford Road/Rushey Green crossing is major deterrent to a better connected centre.
 - v. These new crossings should also support the reduction in traffic speeds (say by use of raised tables and different surfaces). The wide streets are also a barrier deterrent to the formation of a retail circuit and need to be better connected.

- vi. Open spaces – some of the railed off green spaces do not add to the shopping experience; and the railings should be minimised. Some areas could be better as open or even hard landscaping. More and better spaces for eating out are needed, especially on the sunnier south and west sides.
- vii. Connections to the stations: This is too weak at present and could benefit from:
 - o Wider pavements on the north side; and
 - o A stronger “gateway” presence by the St Dunstan’s/Jubilee green space, which contributes little to the urban experience (and the railings detract from the use of the space).
 - o Redevelopment of land around and between the stations would do much to improve the arrival experience and the image of the centre.

Town centre management and other initiatives

- 9.31 The combination of the capital projects and the public realm improvements will deliver the majority of change that the centre needs. But it will take time. So, it is recommended that, especially in the short-term, that the Council increase its commitment to active, focussed, town centre management.
- 9.32 The importance of responsive and active management cannot be overstated; it has two dimensions: management of the units themselves; and the management of the spaces, streets and activities across the town centre as a whole.

Core management approach

- 9.33 Fragmented ownership can be a major deterrent to effecting change, as it becomes so hard to marshal concerted action by so many disparate retailers, investors and interests. Hence the need for techniques that go beyond town centre management. Portas summarised the challenge as “...if our high streets are to have a role tomorrow, then we will need to ensure their management is a match for the sophisticated alternatives.” Those alternative are often on-line, in a retail park (with free parking), or in a rival centre.
- 9.34 One of the ways that some centres, currently mainly in central London, have responded is by an organisation taking such a degree of control that they can manage enough or an entire location as a “retail destination”. This is sometimes described as taking a “curatorial” approach – where the overall mix and rents are managed in the interest of the centre as a whole, as a brand, a place that can constantly respond to changing conditions. Examples include: Marylebone High Street, Covent Garden, Carnaby Street, Regent Street.
- 9.35 In Catford the Council should consider the degree of control of the heart of the town centre it would need to effect such an approach to engineering a step change in the retail mix and management. We would suggest the core areas, especially around its main landholdings, beyond the Catford Centre and into the Broadway and Catford Road, should be the focus for this.

Town centre management initiatives

- 9.36 The Portas Review has many suggestions; and the ATCM organisation provides much good practice. Some of the actions that LBL could consider include:

- A Town Team, with the leader having direct access to a senior officer in a corporate capacity
- A Business Improvement District – though there may not be the critical mass of stakeholders
- Interventions in vacant units – assisting start-up retail, service and catering businesses; and cosmetic improvement while vacant
- Encouragement to “Meanwhile” uses and activities for vacant space as well as units; the letting of Council-owned units for pop-shops and café businesses can create significant interest.
- Enhancing the market and attracting local entrepreneurs, which the new Catford Broadway monthly Sunday market is already starting to achieve.
- Business rate concessions in selected places
- Reviewing parking charges to balance income/convenience considerations while achieving consistency across the whole town centre, which forms part of the Council’s current borough wide review on parking.
- Improving safety of crossings until replaced, which is part of the Council’s on-going conversations with TfL on guard rail removal programmes and short term initiatives for the town centre.
- Applying for funds from DCLG’s new town centre funding initiative

9.37 The Council should consider reducing crime as a priority. Reducing crime was the second most mentioned issue by respondents (after improving the appearance). Town Centre management and (preferably new) public realm will help reduce this. The town team (or equivalent) would liaise with the local police to identify further initiatives, which may simply involve:

- A more visible police presence
- A zero tolerance on litter, graffiti etc
- Establishing Problem Solving Panels (PSP) with relevant stakeholders for specific issues, which the Council is already doing for Catford Broadway and Milford Towers

Ensuring distinctiveness

9.38 From our observation, the main distinctive feature of the town centre is an Afro-Caribbean flavour, found in some of the retail and catering offer; the preponderance of fresh food and produce and accentuated by the regular market. This suggests to us that one way to heighten the centre’s distinctiveness, which would be much aided by local town centre management, is to focus a few initiatives around these themes. We suggest two *flavoured* themes and one centre-wide initiative:

- i **Catford Carnival:** this would be major annual event, sponsored by the Council (possibly only at first) to raise the profile of the centre and to galvanize local talent and energy. It would take over the town centre, for a day and evening, which would be substantially closed to traffic. The Theatre might be a suitable organizing focus.
- ii **Foodie Festivals:** these might be quarterly and focused on fresh produce and an expanded market. The concept would be like a Grand Farmers Market and involve a

greatly extended area devoted to stalls, selling special ranges; cafes and bars would be in support; a Saturday might be best; other related offers could be invited to boost the attractions. It might have seasonal themes, with the Winter one preparing for Christmas. As mentioned above, the Council has recently started a monthly Sunday market in Catford and the Street Trading team, in conjunction with the regeneration programme, are now developing proposals for a food market in this location.

- iii **Catford Card:** this would be a local loyalty card, as has been used in some other centres, which would allow local people to gain certain price reductions or special discounts. It would particularly support local independents, of which there are a good number. This kind of scheme requires considerable organizing but once up and running it can gain momentum and be self-sustaining. One dimension is that it is a way of energizing local people and making the centre more distinctive.

- 9.39 The redevelopment of Laurence House, as we have suggested, could provide an opportunity for a major new building, offering a distinctive design, as a gateway project and a very visible sign of inward investment. It needs to be good, though, as a great building can be a powerful identifier and an additional expression of investor confidence.

Tapping local energy

- 9.40 An example of tapping into the potential of locally funded improvement project is Spacehive.com. Spacehive.com is an award-winning online fundraising platform for neighbourhood improvement projects. It makes it easy for people to transform their local area by sharing the cost of popular projects - from playgrounds to high-street makeovers. It also enables people to develop and showcase projects specific to the built environment, and then raise funds to build them.
- 9.41 Once projects have been verified, funders – from local people to businesses and councils – pledge their contributions online. If the project raises the money it needs, it gets built. Money can also come from grants and public funding streams, and funds can be combined however they are needed. Such funding binds people together in a way that planning can't and gives them ownership over their neighbourhoods, thus creating more cohesive communities.

Retail frontages

- 9.42 Saved Policy ST4 of the UDP states that the Council will strongly resist any change of use involving the loss at ground floor level of Class A1 shops in the Core Shopping Area. However, exceptions will be considered and issues considerations include whether the proposal harms the overwhelming retail appearance of the shopping frontage, with an over-concentration of non-retail uses (normally 3 non A1 uses together and 70% maintained in A1 use).
- 9.43 Maintaining the primary retail function in a centre should remain a policy priority. But, in our view, such percentage based policies can be blunt instruments. For example, it can contribute to some retail uses being protected, when in reality an alternative use might increase footfall and activity in the town centre. In order to maintain the vitality and viability of Catford, as part of its Local Plan, we consider the Council should review its land use policies.

9.44 We note the intention to plot primary and secondary retail frontages in the Core Strategy and we encourage this exercise, which can then be used to define a primary shopping area. This is encouraged and although percentage criteria can be one consideration when considering appropriate uses in the frontages, we do encourage a flexible approach to units where a proposed change of use will contribute to the vitality and viability of a centre.

Other possibilities

9.45 We would suggest that the Council concentrate on a few achievable initiatives and review them, rather than attempt a larger group of tasks that might not get done. The limited number of non-retail (in catering) in the town centre businesses coupled with absence of any specific support measures from the business survey suggests that no particular measures are needed

9.46 The Council is the major employer, it can use its presence to reinforce the vitality of the town centre in a number of ways (some already mentioned)

- Maximise the active ground floor frontages in its buildings (and not necessarily with our services
- Locate its citizen-facing services in locations that best serve the town centre not necessarily in the prime positions;
- Mobilise its own staff as potential supporters of local initiatives such as kick starting a loyalty card scheme (see Catford Card), to boost local spending in the town centre.

Economic development action plan

9.47 In this section, we have outlined in commentary our core recommendations. As per our terms of reference, we now convert this into an action plan to ensure town centre vitality and viability. This considers each intervention by priority, plausibility and impact. In formulating the action plan, we have drawn on the Retail Development Investment Framework prepared by Business in the Community and adapted this for the purposes of Catford.

9.48 When formulating this action plan, we draw on the main headlines from our key recommendations. This will need to be tested through the consultation process that the Council undertakes on the Local Plan. It should be noted that our plausibility judgement is informed by our understanding of the likelihood of success and does not making any judgement in deliverability or funding levels.

Table 10.2 Economic development action plan

Intervention	Impact			Plausibility (high, medium, low)	Priority (critical, important, non-essential)
	Economy	Social	Place-Making		
Capital projects					
Catford Centre	Increased market share to claw back expenditure (about an additional £18 million of spending per annum), increasing the linked trips spending with other business and creating new jobs	Opportunities to involve stakeholders to buy into the project and scope for employment and training associated with new businesses	Improved design, mix of uses and enhanced evening economy increasing the profile of Catford as a retail and leisure destination	High	Critical
Town Hall	Rationalisation of Council assets will reduce expenditure and increase efficiency	Opportunity for community hub linked to the retail core providing	Landmark site in Catford and opportunity to link civic and commercial spaces	Medium	Important
Laurence House	Opportunity to provide residential and mixed use development, increasing	Could deliver a mix of uses with affordable housing to the benefit of the community	Landmark site and opportunity to provide high quality development	Medium	Important
Plassy Road Island	Longer term option to recycle the existing retail uses to provide an higher density development linked to the town centre, increasing spending and creating additional jobs	Opportunities for stakeholders to shape future plans, subject to landowners co-operation	Poor connectivity between site and town centre, opportunity for improved linkages and visibility and a second phase of town centre retail/leisure development	Low	Important
Connectivity and public realm improvements					
Traffic management and calming	Reducing the dominance of traffic in the centre will encourage more people to visit the centre, with associated turnover and jobs growth and spin off	Improved safety for users of the town centre	Reinforce circuit of the town centre and encourage pedestrian use of its various components	Medium	Critical

Intervention	Impact			Plausibility (high, medium, low)	Priority (critical, important, non-essential)
	Economy	Social	Place-Making		
Street furniture	Increase attractiveness of centre, encouraging dwell time and increasing spending	Improved environment for town centre users	Improve appearance of the town centre	High	Important
Open spaces	Provide further facility for the town centre to encouraging visitors to the town, increasing spending	Opportunity to enhance use of open space for different activities for local people	Provides a different land use element to the town centre	Low	Important
Connectivity with Stations	Catford's excellent public transport accessibility can be used to enhance the level of linked trips and spending	Enables all members of the community to easily access the town centre	Improves retail circuit in the town centre	Medium	Important
Town Centre Management					
Retail management	Reducing fragmented ownership mean targeted letting can improve the mix of uses, contributing to a more viable town	Improved mix of uses for town centre users	Enables a more holistic approach to management of land uses and development of key sites	Medium	Important
Town centre management initiatives	Opportunities to enhance the success of the existing centre and businesses, improving turnover and creating jobs	Provides opportunity for the community to be involved in regenerating their town centre, including potential for training alongside initiatives	Improves vitality of town centre with greater activity	Medium	Important
Ensuring distinctiveness	Opportunities to enhance the success of the existing centre and businesses, improving turnover and creating jobs	Potential for neighbourhood improvement projects	Encourages more visitors to the town and greater levels of activity	Medium	Important
Retail frontages	Flexible policies on secondary frontages will reduce longer term vacancies and enable additional businesses to occupy space in the centre, creating new jobs	Improved mix of uses for town centre users	Improves vitality of town centre with greater mix of uses	Medium	Important

Monitoring

- 9.49 This study provides the Council with a set of floorspace requirements to 2026. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, the Council should monitor:
- i town centre planning permissions - by type, amount (sqm gross and net) and location;
 - ii completions – by type, amount and location;
 - iii major changes of use that occur without the need for express permission;
 - iv vacancies;
 - v charity uses (number and location);
 - vi health checks.
- 9.50 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for items (i) and (ii) and annually or every two years for items (iii) to (vi). Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by the Council. Contingent on the timetabling of the Council's key development plan documents, such updating will prove to be valuable when this evidence is tested at examination in public.
- 9.51 This report provides a robust indication of the current position. The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

GLOSSARY OF TERMS

Benchmark turnover: turnover of a store if it were to trade at the company average.

Base year: the start year for any quantitative analysis; normally the year a household survey is undertaken (in this case 2006).

Catchment area: this is an area where a centre or store attracts most of its trade.

Claw back: this is a catchment area's expenditure that is currently spent outside a catchment, but is encouraged to be spent within a catchment through the development of new floorspace.

Comparison spending: spending on non-food items such as clothing, furniture and electrical goods for which some comparison is normally made before purchase.

Convenience spending: spending on everyday items such as food, newspapers and drinks, which tend to be purchased regularly.

Forecast year(s): these are the year(s) when growth is forecast and is used to inform policy options.

Gross floorspace: the gross external floorspace area of a shop, including storage space and ancillary office space.

Inflow: this is expenditure generated from beyond a study area/catchment area that is spent in centres/stores within the study area/catchment area.

Linked trip: Combining a visit to a supermarket or other use with a trip to use other shops and services in a nearby town/district/local/village centre.

Leakage: this is expenditure within a study area/catchment area that is spent outside the study area/catchment area.

Market share: this is the proportion of study area/catchment area's expenditure spent in a centre or store, expressed as a percentage.

Net floorspace: the retail sales floorspace of a store, which is normally defined as the area within the store where members of the public have access or from which sales are made.

Net to gross ratio: the ratio of net sales floorspace to the total gross external floorspace of the store.

Outflow: this is expenditure generated from a study area/catchment area that is spent in centres/stores beyond study area/catchment area boundary.

Overtrading: the amount of turnover in excess of a company benchmark turnover.

Per capita expenditure: amount of money per annum spent on a category of goods by one person per year.

Per capita expenditure growth per annum: annualised real growth in spending (using constant prices).

Price base: the base year of the expenditure data used, which is constant at 2008 prices in this study (note this is different from the base year of the quantitative analysis).

Qualitative Need: floorspace required to improve the provision and distribution of shopping and leisure services to improve choice, meet the needs of the community and promote the vitality and viability of town centres.

Quantitative Need: floorspace required to support the projected expenditure growth over the plan period.

Sales density: the turnover per sqm of net floorspace achieved by retail floorspace.

Sales density growth: the annualised percentage growth in turnover of existing floorspace.

Special forms of trading: non-retail spending, including via the internet, mail order, stalls and markets, door-to-door and telephone sales.

Study area: this is the area where a study of shopping patterns is based upon; it is normally divided into zones.

Under trading: the amount of turnover below a company benchmark turnover.

APPENDIX 1

Quantitative spreadsheets

Catford Retail & Economic Impact Assessment

Table 1: Population growth 2009-2026

Zones ⁽¹⁾	Zone 4	Zone 5	Zone 6	Zone 7	Total
Population projections ⁽²⁾					
Population 2009	54,375	47,663	27,087	84,432	213,557
Population 2012	55,462	48,616	27,628	86,120	217,826
Population 2016	58,183	51,002	28,984	90,346	228,515
Population 2021	59,873	52,483	29,826	92,969	235,151
Population 2026	61,202	53,647	30,488	95,033	240,369
Numeric change 2009-2012	1,087	953	542	1,688	4,270
Percentage change 2009-2012	2.0%	2.0%	2.0%	2.0%	2.0%
Numeric change 2012-2016	2,721	2,386	1,356	4,226	10,688
Percentage change 2012-2016	4.9%	4.9%	4.9%	4.9%	4.9%
Numeric change 2016-2021	1,690	1,481	842	2,624	6,636
Percentage change 2016-2021	2.9%	2.9%	2.9%	2.9%	2.9%
Numeric change 2021-2026	1,329	1,165	662	2,063	5,219
Percentage change 2021-2026	2.2%	2.2%	2.2%	2.2%	2.2%
Numeric change 2009-2016	3,809	3,338	1,897	5,914	14,958
Percentage change 2009-2016	7.0%	7.0%	7.0%	7.0%	7.0%
Numeric change 2009-2026	6,827	5,984	3,401	10,601	26,813
Percentage change 2009-2026	12.6%	12.6%	12.6%	12.6%	12.6%

Notes

(1) Catchment area derived from market share data in Lewisham Retail Capacity Study (LRCS), November 2009

(2) Population base data obtained from Experian and projections derived from the GLA Population Projections 2011 Round, SHLAA, Borr

Catford Retail & Economic Impact Assessment

Table 2a: Benchmark comparison turnover of floorspace in Catford in 2009

Destination	Gross floorspace (sqm)	Net sales floorspace (sqm)	Comparison % sales floorspace	Comparison net floorspace (sqm)	Benchmark sales density (£ per sqm net)	Total benchmark turnover (£m)
Catford comparison shops	14,020	9,814	100%	9,814	4,486	44.0
Tesco, Catford	-	3,364	20%	673	8,531	5.7
Lidl, Catford	-	712	19%	135	2,091	0.3
Aldi, Rushey Green	-	650	24%	156	4,243	0.7
Total	-	14,540	-	10,778	-	50.7

Notes

Floorspace taken from LRCS, although updated for Catford comparison shops
 Sales density for comparison shops taken from LRCS and adjusted to 2010 prices
 Sales density for foodstores derived from Verdict UK Food & Grocery Retailers 2011 Report
 Total benchmark turnover is product of net comparison floorspace at benchmark sales density 2009 in 2010 prices

Catford Retail & Economic Impact Assessment

Table 2b: Benchmark convenience turnover of floorspace in Catford in 2009

Destination	Gross floorspace (sqm)	Net Sales Floorspace (sqm)	Convenience % Sales Floorspace	Convenience Net Floorspace (sqm)	Benchmark Sales Density (£ per sqm net)	Total Benchmark Turnover (£m)
Tesco, Catford	-	3,364	80%	2,691	13,549	36.5
Lidl, Catford	-	712	81%	577	3,328	1.9
Aldi, Rushey Green	-	650	76%	494	6,923	3.4
Other, Catford	-	4,704	100%	4,704	3,500	16.5
Total	-	9,430	-	8,466	-	58.3

Notes

Floorspace taken from LRCS
 Sales density for other convenience shops taken from LRCS and adjusted to 2010 prices, 'other Catford' is RTP updated estimate
 Sales density for foodstores derived from Verdict UK Food & Grocery Retailers 2011 Report
 Total benchmark turnover is product of net convenience floorspace at benchmark sales density 2009 in 2010 prices

Catford Retail & Economic Impact Assessment

Table 3a: Comparison expenditure growth 2009-2026

	Zone 4	Zone 5	Zone 6	Zone 7	Total
2009 (per capita expenditure)	3,069	2,944	3,230	2,804	-
2009 (per capita expenditure, SFT excluded)	2,838	2,724	2,988	2,594	-
2009 (total expenditure, £m, SFT excluded)	154.3	129.8	80.9	219.0	584.1
2012 (per capita expenditure)	3,136	3,010	3,301	2,866	-
2012 (per capita expenditure, SFT excluded)	2,795	2,682	2,941	2,554	-
2012 (total expenditure, £m, SFT excluded)	155.0	130.4	81.3	219.9	586.6
2016 (per capita expenditure)	3,503	3,361	3,687	3,201	-
2016 (per capita expenditure, SFT excluded)	3,058	2,934	3,219	2,794	-
2016 (total expenditure, £m, SFT excluded)	177.9	149.6	93.3	252.5	673.3
2021 (per capita expenditure)	4,021	3,859	4,233	3,675	-
2021 (per capita expenditure, £m, SFT excluded)	3,523	3,380	3,708	3,219	-
2021 (total expenditure, SFT excluded)	210.9	177.4	110.6	299.3	798.2
2026 (per capita expenditure)	4,639	4,452	4,883	4,240	-
2026 (per capita expenditure, SFT excluded)	4,078	3,913	4,292	3,727	-
2026 (total expenditure, SFT excluded)	249.6	209.9	130.9	354.2	944.5

Notes

SFT at 7.5% in 2009, 10.9% in 2012, 12.7% in 2016, 12.4% in 2021 and 12.10% in 2026 according to Experian Retail Planner Briefing Note 9

Expenditure growth at 0.1% to 2010, 0.5% to 2011, 1.6% to 2012 and 2.8% pa to 2021 and 2.9% pa according to 2026 Experian Retail Planner Briefin

Total expenditure is per capita expenditure, SFT excluded, multiplied by population in Table 1

2010 Prices

Catford Retail & Economic Impact Assessment

Table 3b: Convenience expenditure growth 2009-2026

	Zone 4	Zone 5	Zone 6	Zone 7	Total
2009 (per capita expenditure)	1,967	1,968	2,014	1,875	-
2009 (per capita expenditure, SFT excluded)	1,904	1,905	1,950	1,815	-
2009 (total expenditure, £m, SFT excluded)	103.5	90.8	52.8	153.3	400.4
2012 (per capita expenditure)	1,969	1,970	2,016	1,877	-
2012 (per capita expenditure, SFT excluded)	1,878	1,879	1,924	1,791	-
2012 (total expenditure, £m, SFT excluded)	104.2	91.4	53.1	154.2	402.9
2016 (per capita expenditure)	2,008	2,010	2,057	1,915	-
2016 (per capita expenditure, SFT excluded)	1,890	1,891	1,936	1,802	-
2016 (total expenditure, £m, SFT excluded)	110.0	96.4	56.1	162.8	425.3
2021 (per capita expenditure)	2,059	2,060	2,109	1,963	-
2021 (per capita expenditure, £m, SFT excluded)	1,929	1,931	1,976	1,840	-
2021 (total expenditure, SFT excluded)	115.5	101.3	58.9	171.0	446.8
2026 (per capita expenditure)	2,111	2,112	2,162	2,013	-
2026 (per capita expenditure, SFT excluded)	1,968	1,969	2,015	1,876	-
2026 (total expenditure, SFT excluded)	120.4	105.6	61.4	178.3	465.8

Notes

SFT at 3.2% in 2009, 4.6% in 2012, 5.9% in 2016, 6.3% in 2021 and 6.8% in 2026 according to Experian Retail Planner Briefing Note 9

Expenditure growth at 0.8% to 2010, -0.3% to 2011, -0.4% to 2012 and 0.5% pa to 2026 according to Experian Retail Planner Briefing Note 9

Total expenditure is per capita expenditure, SFT excluded, multiplied by population in Table 1

2010 Prices

Catford Retail & Economic Impact Assessment

Table 4a: Comparison goods market shares in 2009

Market shares (%)	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Catford town centre	4%	10%	4%	9%	27%
Lewisham town centre	29%	8%	1%	10%	-
Retail warehousing in LBL	5%	7%	6%	10%	-
Other town centres in LBL	3%	2%	1%	9%	-
Other facilities in LBL	3%	2%	1%	1%	-
Bromley	12%	39%	58%	25%	-
All other destinations	44%	32%	29%	36%	-
TOTAL	100%	100%	100%	100%	-

Notes

Market shares derived from LRCS

Inflow derived from LRCS estimates and updated for smaller study area, included for Catford only

Catford Retail & Economic Impact Assessment

Table 4b: Comparison goods spending patterns in 2009

Spending patterns (£m)	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Catford town centre	6.2	13.0	3.2	19.7	15.3	57.4
Lewisham town centre	44.8	10.4	0.8	21.9	-	-
Retail warehousing in LBL	7.7	9.1	4.9	21.9	-	-
Other town centres in LBL	4.6	2.6	0.8	19.7	-	-
Other facilities in LBL	4.6	2.6	0.8	2.2	-	-
Bromley	18.5	50.6	46.9	54.8	-	-
All other destinations	67.9	41.5	23.5	78.8	-	-
TOTAL	154.3	129.8	80.9	219.0	-	-

Notes

Market shares derived from LRCS

Inflow derived from LRCS estimates and updated for smaller study area

2010 Prices

Catford Retail & Economic Impact Assessment

Table 5a: Convenience goods market shares in 2009

Market shares (%)	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Tesco, Catford	2%	11%	2%	11%	9%
Lidl, Catford	0%	1%	0%	2%	0%
Aldi, Rushey Green	0%	3%	0%	2%	0%
Other, Catford	0%	4%	3%	5%	0%
Sub total, Catford town centre	2%	19%	5%	20%	-
Sainsbury's, Lewisham	15%	4%	0%	2%	-
Tesco, Lewisham	21%	3%	0%	1%	-
Sainsbury's, Lee Green	13%	17%	1%	1%	-
Sainsbury's, Bell Green	4%	6%	6%	26%	-
All other destinations	45%	51%	88%	50%	-
TOTAL	100%	100%	100%	100%	-

Notes

Market shares derived from LRCS

Inflow derived from LRCS estimates and updated for smaller study area, included for Catford only

Catford Retail & Economic Impact Assessment

Table 5b: Convenience goods spending patterns in 2009

Spending patterns (£m)	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Tesco, Catford	2.1	10.0	1.1	16.9	3.0	33.0
Lidl, Catford	0.0	0.9	0.0	3.1	0.0	4.0
Aldi, Rushey Green	0.0	2.7	0.0	3.1	0.0	5.8
Other, Catford	0.0	3.6	1.6	7.7	0.0	12.9
Sub total, Catford town centre	2.1	17.3	2.6	30.7	3.0	55.7
Sainsbury's, Lewisham	15.5	3.6	0.0	3.1	-	-
Tesco, Lewisham	21.7	2.7	0.0	1.5	-	-
Sainsbury's, Lee Green	13.5	15.4	0.5	1.5	-	-
Sainsbury's, Bell Green	4.1	5.4	3.2	39.9	-	-
All other destinations	46.6	46.3	46.5	76.6	-	-
TOTAL	103.5	90.8	52.8	153.3	-	-

Notes

Market shares derived from LRCS

Inflow derived from LRCS estimates and updated for smaller study area
2010 Prices

Catford Retail & Economic Impact Assessment

Table 6a: Overtrading/Undertading in Catford in 2009

	Benchmark turnover (£m)	Survey derived turnover (£m)	Difference (£m)	Difference (%)
Comparison goods				
Catford comparison shops	44.0	-	-	-
Tesco, Catford	5.7	-	-	-
Lidl, Catford	0.3	-	-	-
Aldi, Rushey Green	0.7	-	-	-
Total (comparison goods)	50.7	57.4	6.6	13%
Convenience goods				
Tesco, Catford	36.5	33.0	-3.5	-9%
Lidl, Catford	1.9	4.0	2.1	107%
Aldi, Rushey Green	3.4	5.8	2.4	69%
Other, Catford	16.5	12.9	-3.6	-22%
Total (convenience goods)	58.3	55.7	-2.6	-4%

Notes

Benchmark turnover taken from Table 2

Survey derived turnover taken from Tables 4 and 5

Positive value in difference columns indicates overtrading, negative indicates undertrading.

Catford Retail & Economic Impact Assessment

Table 6b: Commitments in Catford

	Gross floorspace (sqm)	Net sales floorspace (sqm)	Comparison/convenience %	Comparison/convenience floorspace (sqm)	Sales density (£ per sqm)	Total turnover
Comparison goods						
Catford Greyhound Stadium	508	356	50%	178	4,486	0.8
Rising Sun Public House	540	378	50%	189	4,486	0.8
Total comparison goods						1.6
Convenience goods						
Catford Greyhound Stadium	508	356	50%	178	3,500	0.6
Rising Sun Public House	540	378	50%	189	3,500	0.7
Total convenience goods						1.3

Notes

Commitment details taken from LRCS and LBL planning application records

Catford Retail & Economic Impact Assessment

Table 7a: Comparison goods capacity - constant market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	584.1	586.6	673.3	798.2	944.5
B Market share (%)	7.2%	7.2%	7.2%	7.2%	7.2%
C Retained expenditure (£m) (= row A*B)	42.1	42.3	48.5	57.5	68.1
D Total turnover, including inflow (£m)	57.4	57.6	66.1	78.4	92.8
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	57.4	57.4	61.6	67.3	68.6
F Turnover from commitments (£m)	0.0	1.6	1.8	1.9	2.1
Residual expenditure and quantitative need ⁽³⁾					
G Allowance for overtrading/undertrading (£m)	6.6	6.6	6.6	6.6	6.6
H Residual expenditure (£m) (= rows D-E-F+G)	6.6	5.2	9.4	15.7	28.7
I Assumed sales density for new floorspace (£/sqm)	5,322	5,322	5,715	6,249	6,832
J Net floorspace capacity (sqm net) (=rows G/H)	1,249	985	1,644	2,520	4,204
K Gross floorspace capacity (sqm) (= row I/75%)	1,665	1,313	2,192	3,360	5,606

Notes

(1) Derived from Tables 3 and 4

(2) Turnover taken from Row D, no increase to 2012 and 1.8% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Overtrading taken from Table 6, assumed sales density consistent with LRCS and increased at rates at (2)

Catford Retail & Economic Impact Assessment

Table 7b: Comparison goods capacity - enhanced market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	584.1	586.6	673.3	798.2	944.5
B Market share (%)	7.2%	7.2%	8.2%	8.2%	8.2%
C Retained expenditure (£m) (= row A*B)	42.1	42.3	55.2	65.5	77.4
D Total turnover, including inflow (£m)	57.4	57.6	75.2	89.2	105.5
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	57.4	57.4	61.6	67.3	68.6
F Turnover from commitments (£m)	0.0	1.6	1.8	1.9	2.1
Residual expenditure and quantitative need ⁽³⁾					
G Allowance for overtrading/undertrading (£m)	6.6	6.6	6.6	6.6	6.6
H Residual expenditure (£m) (= rows D-E-F+G)	6.6	5.2	18.5	26.5	41.5
I Assumed sales density for new floorspace (£/sqm)	5,322	5,322	5,715	6,249	6,832
J Net floorspace capacity (sqm net) (=rows G/H)	1,249	985	3,236	4,246	6,072
K Gross floorspace capacity (sqm) (= row I/75%)	1,665	1,313	4,314	5,661	8,096

Notes

(1) Derived from Tables 3 and 4

(2) Turnover taken from Row D, no increase to 2012 and 1.8% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Overtrading taken from Table 6, assumed sales density consistent with LRCS and increased at rates at (2)

Catford Retail & Economic Impact Assessment

Table 8a: Convenience goods capacity - constant market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	400.4	402.9	425.3	446.8	465.8
B Market share (%)	13.1%	13.1%	13.1%	13.1%	13.1%
C Retained expenditure (£m) (= row A*B)	52.6	52.9	55.9	58.7	61.2
D Total turnover, including inflow (£m)	55.7	56.0	59.1	62.1	64.7
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	55.7	55.7	56.3	57.2	57.3
F Turnover from commitments (£m)	0.0	1.3	1.3	1.3	1.3
Residual expenditure and quantitative need ⁽³⁾					
G Allowance for overtrading/undertrading (£m)	-2.6	-2.6	-2.6	-2.6	-2.6
H Residual expenditure (£m) (= rows D-E-F+G)	-2.6	-3.6	-1.1	1.0	3.4
I Assumed sales density for new floorspace (£/sqm)	11,000	11,000	11,133	11,301	11,471
J Net floorspace capacity (sqm net) (=rows G/H)	-238	-323	-101	88	299
K Gross floorspace capacity (sqm) (= row I/65%)	-366	-497	-156	135	461

Notes

(1) Derived from Tables 3 and 5

(2) Turnover taken from Row D, no increase to 2012 and 0.3% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Overtrading taken from Table 6, assumed sales density consistent with LRCS and increased at rates at (2)

Catford Retail & Economic Impact Assessment

Table 8b: Convenience goods capacity - enhanced market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	400.4	402.9	425.3	446.8	465.8
B Market share (%)	13.1%	13.1%	15.1%	15.1%	15.1%
C Retained expenditure (£m) (= row A*B)	52.6	52.9	64.2	67.5	70.3
D Total turnover, including inflow (£m)	55.7	56.0	67.9	71.4	74.4
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	55.7	55.7	56.3	57.2	57.3
F Turnover from commitments (£m)	0.0	1.3	1.3	1.3	1.3
Residual expenditure and quantitative need ⁽³⁾					
G Allowance for overtrading/undertrading (£m)	-2.6	-2.6	-2.6	-2.6	-2.6
H Residual expenditure (£m) (= rows D-E-F+G)	-2.6	-3.6	7.7	10.2	13.1
I Assumed sales density for new floorspace (£/sqm)	11,000	11,000	11,133	11,301	11,471
J Net floorspace capacity (sqm net) (=rows G/H)	-238	-323	690	907	1,141
K Gross floorspace capacity (sqm) (= row I/75%)	-366	-497	1,062	1,395	1,755

Notes

(1) Derived from Tables 3 and 5

(2) Turnover taken from Row D, no increase to 2012 and 0.3% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Overtrading taken from Table 6, assumed sales density consistent with LRCS and increased at rates at (2)

Catford Retail & Economic Impact Assessment

Table 9a: Per capita expenditure on leisure

Year	Expenditure category	Zone 4	Zone 5	Zone 6	Zone 7
2009	Accommodation services	106	82	126	76
	Cultural services	262	249	296	233
	Games of chance	91	111	101	93
	Hairdressing salons and personal grooming establishments	78	72	82	62
	Recreational and sporting services	109	105	144	89
	Restaurants, cafes etc...	1,339	1,140	1,324	1,121
	TOTAL	1,984	1,759	2,073	1,674
2012	Accommodation services	105	81	125	76
	Cultural services	261	248	295	231
	Games of chance	90	110	101	93
	Hairdressing salons and personal grooming establishments	77	72	82	62
	Recreational and sporting services	108	105	144	89
	Restaurants, cafes etc...	1,332	1,134	1,317	1,116
	TOTAL	1,974	1,750	2,063	1,666
2016	Accommodation services	108	83	128	78
	Cultural services	267	254	302	237
	Games of chance	93	113	103	95
	Hairdressing salons and personal grooming establishments	79	74	84	63
	Recreational and sporting services	111	107	147	91
	Restaurants, cafes etc...	1,366	1,162	1,350	1,144
	TOTAL	2,024	1,794	2,115	1,708
2021	Accommodation services	113	87	134	81
	Cultural services	280	266	316	248
	Games of chance	97	118	108	99
	Hairdressing salons and personal grooming establishments	83	77	88	66
	Recreational and sporting services	116	112	154	95
	Restaurants, cafes etc...	1,430	1,217	1,413	1,197
	TOTAL	2,118	1,878	2,214	1,788
2026	Accommodation services	119	92	141	85
	Cultural services	294	279	332	261
	Games of chance	102	124	113	104
	Hairdressing salons and personal grooming establishments	87	81	93	70
	Recreational and sporting services	122	118	162	100
	Restaurants, cafes etc...	1,502	1,279	1,485	1,258
	TOTAL	2,226	1,974	2,327	1,879

Notes

Expenditure growth at 0.6 to 2010, -1.5% to 2011, 0.3% to 2012, 1.0% to 2013, 0.8% pa to 2018 and 1.0% pa to 2026 according to Experian Retail F 2010 Prices

Catford Retail & Economic Impact Assessment

Table 9b: Total expenditure on leisure

Year	Expenditure category	Zone 4	Zone 5	Zone 6	Zone 7	Total
2009	Accommodation services	5.8	3.9	3.4	6.4	19.5
	Cultural services	14.2	11.9	8.0	19.6	53.8
	Games of chance	4.9	5.3	2.7	7.9	20.8
	Hairdressing salons and personal grooming establishments	4.2	3.5	2.2	5.2	15.1
	Recreational and sporting services	5.9	5.0	3.9	7.5	22.4
	Restaurants, cafes etc...	72.8	54.3	35.9	94.7	257.6
	TOTAL	107.9	83.8	56.2	141.4	389.2
2012	Accommodation services	5.8	4.0	3.5	6.5	19.8
	Cultural services	14.5	12.0	8.1	19.9	54.6
	Games of chance	5.0	5.4	2.8	8.0	21.1
	Hairdressing salons and personal grooming establishments	4.3	3.5	2.3	5.3	15.4
	Recreational and sporting services	6.0	5.1	4.0	7.6	22.7
	Restaurants, cafes etc...	73.9	55.1	36.4	96.1	261.4
	TOTAL	109.5	85.1	57.0	143.5	395.0
2016	Accommodation services	6.3	4.3	3.7	7.0	21.3
	Cultural services	15.6	12.9	8.8	21.4	58.7
	Games of chance	5.4	5.8	3.0	8.6	22.7
	Hairdressing salons and personal grooming establishments	4.6	3.8	2.4	5.7	16.5
	Recreational and sporting services	6.4	5.5	4.3	8.2	24.4
	Restaurants, cafes etc...	79.5	59.3	39.1	103.3	281.2
	TOTAL	117.7	91.5	61.3	154.3	424.8
2021	Accommodation services	6.8	4.6	4.0	7.6	22.9
	Cultural services	16.8	13.9	9.4	23.1	63.2
	Games of chance	5.8	6.2	3.2	9.2	24.5
	Hairdressing salons and personal grooming establishments	5.0	4.1	2.6	6.2	17.8
	Recreational and sporting services	6.9	5.9	4.6	8.9	26.3
	Restaurants, cafes etc...	85.6	63.9	42.2	111.3	302.9
	TOTAL	126.8	98.6	66.0	166.2	457.6
2026	Accommodation services	7.3	4.9	4.3	8.1	24.6
	Cultural services	18.0	15.0	10.1	24.8	67.9
	Games of chance	6.2	6.7	3.5	9.9	26.3
	Hairdressing salons and personal grooming establishments	5.3	4.4	2.8	6.6	19.1
	Recreational and sporting services	7.5	6.3	4.9	9.5	28.2
	Restaurants, cafes etc...	92.0	68.6	45.3	119.6	325.4
	TOTAL	136.3	105.9	70.9	178.6	491.7

Notes

Total expenditure is per capita expenditure in Table 9a multiplied by population in Table 1
2010 Prices

Catford Retail & Economic Impact Assessment

Table 9c: Leisure expenditure growth by zone

Year	Expenditure category	Zone 4	Zone 5	Zone 6	Zone 7	Total
2009-2012	Accommodation services	0.1	0.1	0.1	0.1	0.3
	Cultural services	0.2	0.2	0.1	0.3	0.8
	Games of chance	0.1	0.1	0.0	0.1	0.3
	Hairdressing salons and personal grooming establishments	0.1	0.1	0.0	0.1	0.2
	Recreational and sporting services	0.1	0.1	0.1	0.1	0.3
	Restaurants, cafes etc...	1.1	0.8	0.5	1.4	3.8
	TOTAL	1.6	1.2	0.8	2.1	5.7
2012-2016	Accommodation services	0.4	0.3	0.3	0.5	1.5
	Cultural services	1.1	0.9	0.6	1.5	4.1
	Games of chance	0.4	0.4	0.2	0.6	1.6
	Hairdressing salons and personal grooming establishments	0.3	0.3	0.2	0.4	1.2
	Recreational and sporting services	0.5	0.4	0.3	0.6	1.7
	Restaurants, cafes etc...	5.6	4.2	2.7	7.3	19.7
	TOTAL	8.3	6.4	4.3	10.8	29.8
2016-2021	Accommodation services	0.5	0.3	0.3	0.5	1.6
	Cultural services	1.2	1.0	0.7	1.7	4.5
	Games of chance	0.4	0.4	0.2	0.7	1.8
	Hairdressing salons and personal grooming establishments	0.4	0.3	0.2	0.4	1.3
	Recreational and sporting services	0.5	0.4	0.3	0.6	1.9
	Restaurants, cafes etc...	6.1	4.6	3.0	8.0	21.7
	TOTAL	9.1	7.1	4.7	11.9	32.8
2021-2026	Accommodation services	0.5	0.3	0.3	0.6	1.7
	Cultural services	1.2	1.0	0.7	1.7	4.7
	Games of chance	0.4	0.5	0.2	0.7	1.8
	Hairdressing salons and personal grooming establishments	0.4	0.3	0.2	0.5	1.3
	Recreational and sporting services	0.5	0.4	0.3	0.7	2.0
	Restaurants, cafes etc...	6.4	4.7	3.1	8.3	22.5
	TOTAL	9.4	7.3	4.9	12.4	34.0
2009-2026	Accommodation services	1.5	1.0	0.9	1.7	5.1
	Cultural services	3.7	3.1	2.1	5.2	14.1
	Games of chance	1.3	1.4	0.7	2.1	5.5
	Hairdressing salons and personal grooming establishments	1.1	0.9	0.6	1.4	4.0
	Recreational and sporting services	1.6	1.3	1.0	2.0	5.9
	Restaurants, cafes etc...	19.2	14.3	9.4	24.9	67.8
	TOTAL	28.4	22.1	14.8	37.2	102.4

Notes

Total expenditure is per capita expenditure in Table 9a multiplied by population in Table 1
2010 Prices

Catford Retail & Economic Impact Assessment

Table 10a: Indicative capacity for A3-A5 uses - Constant market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	257.6	261.4	281.2	302.9	325.4
B Market share (%)	9.3%	9.3%	9.3%	9.3%	9.3%
C Retained expenditure (£m) (= row A*B)	24.0	24.4	26.2	28.2	30.3
D Total turnover, including inflow at 5% (£m)	25.3	25.6	27.6	29.7	31.9
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	25.3	25.3	25.8	26.4	26.6
F Turnover from commitments (£m)	0.0	0.0	0.0	0.0	0.0
Residual expenditure and quantitative need ⁽³⁾					
G Residual expenditure (£m) (= rows D-E-F)	0.0	0.4	1.8	3.3	5.4
H Assumed sales density for new floorspace (£/sqm)	2,671	2,671	2,725	2,794	2,864
I Gross floorspace capacity (sqm net) (=rows G/H)	0	140	661	1,174	1,870

Notes

(1) Derived from Tables 3 and 4 and the LRCS Household Shopping Survey

(2) Turnover taken from Row D, no increase to 2012 and 0.5% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Assumed sales density based on RTP assumption and increased at the same rate as (2)

Catford Retail & Economic Impact Assessment

Table 10b: Indicative capacity for A3-A5 uses - Enhanced market share

	2009	2012	2016	2021	2026
Available expenditure ⁽¹⁾					
A Total study area expenditure (£m)	257.6	261.4	281.2	302.9	325.4
B Market share (%)	9.3%	9.3%	9.8%	9.8%	9.8%
C Retained expenditure (£m) (= row A*B)	24.0	24.4	27.6	29.7	31.9
D Total turnover, including inflow at 5% (£m)	25.3	25.6	29.0	31.2	33.6
Claims on expenditure growth ⁽²⁾					
E Turnover of existing floorspace (£m) (= row D)	25.3	25.3	25.8	26.4	26.6
F Turnover from commitments (£m)	0.0	0.0	0.0	0.0	0.0
Residual expenditure and quantitative need ⁽³⁾					
G Residual expenditure (£m) (= rows D-E-F)	0.0	0.4	3.2	4.8	7.0
H Assumed sales density for new floorspace (£/sqm)	2,671	2,671	2,725	2,794	2,864
I Gross floorspace capacity (sqm net) (=rows G/H)	0	140	1,187	1,727	2,450

Notes

(1) Derived from Tables 3 and 4 and the LRCS Household Shopping Survey

(2) Turnover taken from Row D, no increase to 2012 and 0.5% pa between 2012 and 2026; commitments from Table 6b increased at same rate

(3) Assumed sales density based on RTP assumption and increased at the same rate as (2)

Catford Retail & Economic Impact Assessment

Table 11: Summary of floorspace capacity outputs

Category of floorspace (sqm)	2009	2012	2016	2021	2026
Comparison goods floorspace					
Constant market share - sqm net	1,200	1,000	1,600	2,500	4,200
Constant market share - sqm gross	1,700	1,300	2,200	3,400	5,600
Enhanced market share - sqm net	1,200	1,000	3,200	4,200	6,100
Enhanced market share - sqm gross	1,700	1,300	4,300	5,700	8,100
Convenience goods floorspace					
Constant market share - sqm net	-200	-300	-100	100	300
Constant market share - sqm gross	-400	-500	-200	100	500
Enhanced market share - sqm net	-200	-300	700	900	1,100
Enhanced market share - sqm gross	-400	-500	1,100	1,400	1,800
A3-A5 Food and drink uses					
Constant market share - sqm gross	0	100	700	1,200	1,900
Enhanced market share - sqm gross	0	100	1,200	1,700	2,400

Notes

Rounded outputs provided as summarised from Tables 1-10

Catford Retail & Economic Impact Assessment

Table 12: Potential policy output scenarios for A Class Uses to 2021 and 2026

Category of floorspace	2021 - Constant market share (sqm gross)	2021 - Enhanced market share (sqm gross)	2026 - Constant market share (sqm gross)	2026 - Enhanced market share (sqm gross)
A1 Comparison floorspace	3,400	5,700	5,600	8,100
A1 Convenience floorspace	100	1,400	500	1,800
A1 Service/A2 Floorspace	500	1,000	900	1,400
A3,A4 & A5 Floorspace	1,200	1,700	1,900	2,400
TOTAL	5,200	9,800	8,900	13,700

Notes

A1 Service/A2 Floorspace assumed to be 10% of all floorspace

APPENDIX 2

Catford Goad plan

CATFORD

