ROYAL GREENWICH RETAIL & LEISURE STUDY

Volume C: Shopping & Leisure Patterns and Retail Capacity Assessment

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This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

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Appendices:

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1. INTRODUCTION

1. This Volume of the Royal Greenwich Retail and Leisure Study reviews existing retail and leisure activity in the borough and sets out the methodology and results of the economic retail capacity ('need') assessment for new retail (convenience and comparison goods) floorspace in the Royal Borough of Greenwich ('Royal Greenwich') and its main retail centres.

EXPERIAN INSIGHTS DATA

2. To provide the necessary information on expenditure patterns in the adopted Study Area, data has been obtained from Experian Insights as an alternative to undertaking a household survey of a sample of local residents.

3. Experian Insights uses actual transaction data from 4 million customers across the UK. This information can be used to identify how much money is spent in specified locations and the origin of that spend (i.e. customer home location), using different levels of geography and against typical retail and leisure categories. This allows a detailed understanding of actual customer behaviour.

4. For this study, the data has been provided for the following:

Study Area

5. The study area is based on three zones as shown on the Map provided at Appendix C1, with Zone 1 covering the Royal Greenwich local authority area (approximately) and Zones 2 and 3 the areas immediately around. Within each zone larger centres are identified, and expenditure to outlets within these centres is set out.

6. Aggregated expenditure for smaller centres and standalone is classified under 'Other Zone' for each zone.

7. To better understand expenditure outflows from the area, expenditure from each of the zones to the key competing centres listed below has also been assessed, along with all other leakage to competing centres within and outside of the Study Area.

Zone 1 - Royal Greenwich	Zone 2	Zone 3
Eltham Town Centre	Bexleyheath	Catford
Woolwich Town Centre	Bexley	Bromley Road Retail Park
Blackheath District Centre	Sidcup	Chislehurst
East Greenwich District Centre	Crittals Corner Retail Park	Deptford
Greenwich West District Centre	Welling	Lewisham
North Greenwich District Centre	All Other	All Other
Plumstead District Centre		
Thamesmead District Centre		
All Other		

Outside Study Area		
Beckenham	Downham	Ruxley Roundabout Retail Park
Bluewater	London Bridge	All Other/ Rest of UK
Brixton	London City	
Canary Wharf	London West End	
Catford	Petts Wood	

8. The market share of online expenditure is also identified by zone and for the study area as a whole.

9. Inflows of expenditure to Royal Greenwich from peripheral zones (Zones 2 & 3) and from beyond the Study Area is also provided. This expenditure is referred to throughout the report as "expenditure inflow" or "expenditure uplift".

Expenditure Categories

10. Given the purpose of this study is to determine the capacity / need for additional retail floorspace and other town centre uses/ facilities and to examine commercial leisure trends, the expenditure data provided by Experian Insights relates to the following expenditure categories:

Table 1: Experian Insights Retail and Leisure Food & Beverage Categories

Category Name	Sub Sector
Supermarkets	Convenience stores
	Supermarkets
Comparison Retail (All)	Florists
	Bags and Accessories
	Jewellery and Watches
	Menswear
	Shoes
	Sportswear
	Unisex
	Womenswear
	Delivery Services
	Baby and Childrenswear
	Books and Stationery
	Cards and Gifts
	Department Stores
	Discount Retailers
	Electronics and Appliances
	Other - General Retail
	Pets
	DIY and Interior Design
	Furniture
	Garden
	Household Products

Leisure Food & Drink	Cafes and Coffee Shops
	Confectionary
	Fast Food Chains
	Food Delivery Services
	Non-Alcoholic Beverages
	Pubs and Bars
	Restaurants
Entertainment	Attractions and Experiences
	Entertainment - Other
	Live Shows and Events
	Music & Video Streaming
	Sports Equipment & Clubs
	Toys and Gaming

11. Experian Insights transaction data estimated for a 12-month period ending 31st January 2025. As such, the data provides a good baseline for understanding how residents and visitors spend money on retail goods and leisure activities, taking account of variances that typically occur over a given year (e.g. seasonal activity).

12. The base data is provided in Appendix C2 as follows:

- Table 1 Supermarket Spend
- Table 2 Comparison Spend
- Table 3 Leisure Food & Drink Spend
- Table 4 Entertainment

2. RETAIL SPEND PATTERNS

13. The data supplied by Experian Insights on retail spend is presented in Tables 1-3 of Appendix C2.

14. Population and retail expenditure data for the study zones and the Royal Greenwich area has also been obtained from Experian, which is set out in Tables 1 to 5 of Appendix C3. These calculations are applied to the transactional data to estimate the distribution of convenience and comparison expenditure across the identified centres within and outside of the study area. The results are presented in percentage and monetary terms for the base and forecast years for in Tables 1-8 of Appendix C4 and Appendix C5 for convenience and comparison, respectively.

15. The resulting tables provide useful information on spending patterns within Royal Greenwich and the wider study area both for different types of retail spend and within the individual centres. Key findings are noted below.

SUPERMARKET / CONVENIENCE RETAIL SPEND

16. Supermarket expenditure represents transactions made at foodstores, supermarkets, and convenience stores, and includes national multiples and independent operators. This form of expenditure is also referred to as convenience retail expenditure.

17. The market share analysis of Experian Insights data on convenience retail spend is set out in Tables 1-8 of Appendix C4 and are summarised in the table below and follow on paragraphs.

18. The table below shows how expenditure generated by residents in each study zone is distributed or captured by centres in Zone 1, which broadly reflects the Royal Greenwich Council area. The allocation of expenditure is represented as a percentage of total expenditure for the zone or the total study area, which is referred to as 'market share' or 'market shares'.

Table 2: Distribution of Supermarket Expenditure

	Zone 1	Zone 2	Zone 3	Study Area
Abbey Wood Local Centre	0.08%	0.03%	0.00%	0.04%
Blackheath District Centre	0.10%	0.01%	0.02%	0.05%
Eltham Major Town Centre	6.69%	1.82%	1.51%	3.73%
East Greenwich District Centre	0.98%	0.02%	0.03%	0.41%
Greenwich Peninsula & Charlton Riverside	14.10%	1.53%	1.95%	6.77%
Greenwich West District Centre	0.99%	0.03%	0.29%	0.49%
Kidbrooke Local Centre	4.07%	0.42%	0.99%	2.06%
Lee District Centre	2.25%	0.06%	3.49%	1.85%
North Greenwich District Centre	0.21%	0.03%	0.02%	0.10%
Plumstead District Centre	0.54%	0.04%	0.01%	0.24%
Thamesmead District Centre	1.05%	0.39%	0.02%	0.56%
Woolwich Major Town Centre	7.43%	0.46%	0.26%	3.25%
All Other	20.02%	3.83%	2.32%	10.04%
Zone 1 - Royal Greenwich	**58.51%**	**8.65%**	**10.90%**	**29.59%**
Centres Outside the Borough	28.83%	74.85%	76.52%	56.50%
Online	12.66%	16.50%	12.57%	13.91%
Total Market Share	100.00%	100.00%	100.00%	100.00%

Note: Zone 1 broadly correlates to the administrative boundary for Royal Greenwich

19. The distribution of spend on convenience retail (as evidenced by Experian Insight's data on supermarket spend) would normally be expected to reflect proximity to home and the degree of available convenience retail facilities. This is generally the case for Royal Greenwich (and for most London authorities) where convenience and supermarket provision is reasonably strong and where residents are more likely to undertake frequent basket shopping. As a result, online convenience shopping market share for the study area (13.9%) is expected to be below the national average identified by Experian (18.6%).

20. Zonal market shares show a more accurate representation of catchment market shares for the centres. The primary convenience retail shopping catchment for Royal Greenwich's centres is represented by Zone 1 which show that 58.51% of zonal expenditure is retained by stores in the borough.

21. Within Zone 1, out of centre retail facilities, such as those at in the Greenwich Peninsula and Charlton Riverside (including Millennium Retail Park, Greenwich Shopping Park, and surrounding retail facilities) command the greatest market share of Royal Greenwich's retail destinations at 14.10%. The market share will be influenced by the good provision of foodstore within the Greenwich Peninsula and Charlton Riverside area, including Sainsbury's, Lidl, Asda, Aldi, and M&S. The shopping park is one of two locations in the borough that draw expenditure from neighbouring zones, albeit relatively low (1.53% and 1.95% from Zones 2 and 3, respectively).

22. Woolwich Town Centre captures the second highest proportion (7.43%) of Zone 1 expenditure. The town's convenience offer is anchored by Tesco Extra, which is one of a limited number of major foodstores trading from a town centre location in the borough.

23. Eltham Town Centre draws a 6.69% market share from Zone 1 and a similar market share from Zones 2 and 3 as Greenwich Peninsula and Charlton Riverside. The market share from Zones 2 and 3 is influenced by the centre's peripheral position within the borough/ Zone 1.

24. Market share for the borough's district centres is limited and reflects the more limited scale of convenience/ supermarket offer.

25. Transaction data is limited for the borough's smaller centres, however there was notable market share identified for Kidbrooke, which draws 4.07% of Zone 1 expenditure. This appears to be linked to the Aldi store at Kidbrooke Park Road.

26. Typically, catchment expenditure for convenience spend is localised (in other words residents are more likely to visit stores closest to where they live). Therefore it is more relevant to focus on the rates of expenditure retention from Zone 1, which broadly covers the Royal Greenwich area. The analysis shows that convenience stores in Royal Greenwich are capturing or retaining 58.51% of Zone 1 expenditure. This is considered to be low based on retention rates for other local authority areas that LSH have assessed (where retention is typically above 60% for convenience retail).

27. Convenience spend leakage from the area is relatively high with 28.8% of total spend leaving the Royal Greenwich area. However, the majority of this leakage is being spent online (12.66% of Zone 1 expenditure), with the rest going to a wide variety of locations in neighbouring local authorities and beyond.

28. Low levels of expenditure retention and high levels of expenditure leakage may be a consequence of residents carrying out shopping trips close to where they work, which could be in areas across London. This would correlate to wide distribution of expenditure leakage that has been identified. The results could also reflect the proximity of major foodstores in neighbouring local authorities, such as superstores in Bexleyheath which will be easily accessible to residents to the east of Zone 1.

COMPARISON RETAIL SPEND

29. The findings of the comparison retail spend analysis are set out in Tables 1-8 in Appendix C5. The percentage baseline market shares for 2025 are presented in Table 4 of Appendix C5 and summarised in the following table.

Table 3: Comparison Retail Market Shares – Including Online Transactions

	Zone 1	Zone 2	Zone 3	Study Area
Abbey Wood Local Centre	0.14%	0.10%	0.00%	0.09%
Blackheath District Centre	0.59%	0.03%	0.34%	0.35%
Eltham Major Town Centre	6.41%	2.46%	1.57%	3.92%
East Greenwich District Centre	0.36%	0.00%	0.00%	0.15%
Greenwich Peninsula & Charlton Riverside	12.49%	3.08%	3.09%	7.12%
Greenwich West District Centre	0.68%	0.04%	0.35%	0.40%
Kidbrooke Local Centre	0.31%	0.04%	0.07%	0.16%
Lee Green District Centre	1.02%	0.03%	1.61%	0.88%
North Greenwich District Centre	0.57%	0.17%	0.22%	0.36%
Plumstead District Centre	0.16%	0.03%	0.00%	0.08%
Thamesmead District Centre	0.48%	0.20%	0.01%	0.27%
Woolwich Major Town Centre	3.63%	0.35%	0.18%	1.71%
All Other	4.54%	1.98%	1.19%	2.86%
Zone 1 - Royal Greenwich	31.38%	8.51%	8.63%	18.36%
Centres Outside the Borough	26.05%	33.49%	39.20%	31.82%
Online	37.33%	36.53%	40.98%	38.06%
Total Market Share	100.00%	100.00%	100.00%	100.00%

Note: Zone 1 broadly correlates to the administrative boundary for Royal Greenwich.

30. Comparison spend within Royal Greenwich is relatively low with retailers retaining 18.36%% of total study area expenditure. At zonal level, expenditure retention increases to 31.38% for Royal Greenwich, which is a reasonably strong rate of retention in the face of competition from online and nearby regional shopping destinations.

31. Greenwich Peninsula and Charlton Riverside area collectively retain around 7.12% of study area expenditure. The market share for out of centre facilities increases to 12.49% for Zone 1, with a more limited catchment reach within Zone 2 and 3.

32. Of the borough's centres, Eltham captures most of the retained expenditure (3.92%), followed by Woolwich (1.71%). As with the borough's out of centre facilities, the market share for both towns increases for Zone 1 (6.41% and 3.63%, respectively).

33. Generally, market shares for the borough's other centres are low and the analysis demonstrates the significant influence of out of centre retail facilities in attracting expenditure from Royal Greenwich's residents.

34. Over a quarter (26.05%) of expenditure from Zone 1 is spent at centres outside of the borough. While the majority of the leaked expenditure distributed to a broad range of locations it noted that Bluewater attracts the highest proportion (4.88%), followed by London's West End (3.36%).

35. Online sales account for 31.82% of total Study Area spend, some five percentage points higher than the UK average suggested by Experian. At zonal level online market share ranges from 36.53% (Zone 2) to 40.98% (Zone 3).

INFLOW' FROM OUTSIDE THE STUDY AREA

36. The Experian Insights data identifies transactional spend on centres in Royal Greenwich made by UK visitors that reside outside of the Study Area. From this we can estimate the percentage uplift on retained Study Area expenditure and by zone and centre. Expenditure inflow is estimated for the base year (2025) alongside the baseline market shares for convenience goods (Table 3, Appendix C4) and comparison goods (Table 2, Appendix C5).

37. The percentage uplift from expenditure inflow identified for centres in Royal Greenwich are summarised below:

Table 4: Inflow of Expenditure From Outside the Study Area

Retail Location	Convenience	Comparison	Total Retail
Abbey Wood	20%	29%	26%
Blackheath (London)	23%	46%	44%
Eltham	9%	9%	9%
Greenwich East	16%	3%	13%
Greenwich Peninsula and Charlton Riverside	22%	98%	61%
Greenwich Village	51%	39%	46%
Kidbrooke	9%	10%	9%
Lee	7%	8%	7%
North Greenwich	215%	139%	156%
Plumstead	11%	34%	17%
Thamesmead	20%	17%	19%
Woolwich	17%	20%	18%
All Other	15%	20%	17%
Zone 1 - Royal Greenwich	17%	50%	30%

Note: Zone 1 broadly correlates to the administrative boundary for Royal Greenwich.

38. The results show the considerable importance of visitor expenditure in supporting centre market shares, particularly for comparison retail businesses.

39. As expected, North Greenwich attracts a significant uplift in retained expenditure from visitors for both convenience and comparison goods spend. The uplift will be explained by the presence of the discount shopping village the 02 complex (Outlet Shopping at the 02). The centre represents one of only two major discount outlet shopping centres in London. As such, the centre will command a particularly wide catchment.

40. It should be noted that the uplifts do not take account of expenditure generated from overseas visitors. For Royal Greenwich, uplift will be considerably higher for particular centres that are popular with international visitors, such as Greenwich West (Greenwich Town Centre) and North Greenwich.

SUMMARY

41. Royal Greenwich is reasonably popular as a shopping destination for borough residents. This is mainly the case for convenience goods shopping with residents following a typical habit of choosing convenience facilities that are close to where they reside. In contrast the analysis indicates that the borough residents are more likely to shop at competing locations or online. This will reflect a limited offer in comparison retail, particularly clothing and footwear which makes up the highest proportion of comparison goods spend. As a result, residents will be drawn to the nearest major shopping centres to Royal Greenwich, such as Bluewater and Central London.

42. However, the data on expenditure inflow from transactions generated from visitors (residing beyond the study area) shows the considerable value of the visitor pound to businesses in Royal Greenwich.

3. RETAIL CAPACITY ASSESSMENT

43. Having used the Experian Insights transaction data to inform our understanding of shopping spending across the Study Area, the next stage is to undertake the economic retail capacity ('need') assessment for new retail (convenience and comparison goods) floorspace in Royal Greenwich.

44. Aligned with the NPPF and PPG the capacity forecasts take account of the lifetime of the plan starting from 2025 (base year) up to 2037. The detailed economic capacity tabulations are set out in Appendices C4 and C5. These forecasts update and supersede the findings of the Council's previous evidence-based studies.

THE CREAT^e MODEL

45. The assessment utilises the CREAT^e economic model which has been specifically designed, developed and tested by the LSH team over more than 25 years to assess the capacity for and impact of new retail (convenience and comparison goods) floorspace development. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional and regional level. In brief, the CREAT^e (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested.

46. The Experian Insights data provides the basis for the retail capacity assessment which uses the CREAT^e model to forecast actual capacity for convenience and comparison goods.

47. At the outset it has been assumed for the purpose of the capacity assessment that the local retail market in Royal Greenwich is in 'equilibrium' at the base year. In other words, all existing centres/stores are broadly assumed to be trading in line with expected average ('benchmark') turnover levels. This is a reasonable approach in this case as it reflects the impact of the economic downturn and the significant growth in online sales on the trading levels and performance of retailers and stores across the UK. It also reflects the outputs of the health checks and surveys covering the borough's town and district centres.

48. In this case, there is no evidence to suggest a strong latent demand or capacity for new retail floorspace across the borough, as a number of committed schemes remain unimplemented, or with decreasing retail content. In fact, the main challenge and focus for the borough's centres over the short/medium term will revolve around their response to a multitude of economic factors. They include:

- their response to evolving market trends;
- on-going recovery from the COVID-19 pandemic and changing working habits;
- impacts from the energy and cost of living crisis;
- the Bank of England's changing fiscal policies, and
- uncertainties surrounding the impact of the recent budget.

49. These factors will influence the ability for the borough's centres to retain existing occupiers and to redevelop/repurpose vacant retail floorspace to attract new businesses and uses.

50. In simple terms, any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers based on applying robust year-on-year 'productivity' ('turnover efficiency') growth rates to all existing and new retail floorspace.

51. It is important to restate that medium to long term forecasts should be treated with caution, as they will be influenced by the dynamic changes in economic, demographic and market trends. As described previously (see Section 2), the NPPF (paragraph 90a) states that local planning authorities should meet the need for retail and town centre uses "looking at least ten years ahead". The Planning Practice Guidance also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed". Therefore, whilst this study assesses retail capacity up to 2037, greater weight should be placed by the local planning authority on forecasts over the next five (to 2030) to ten-year period (to 2035).

52. The updated capacity forecasts set out in this section provide the Council with a broad indication of the (quantitative) need for new retail (comparison and convenience goods) floorspace in Royal Greenwich and its main centres. In turn, this will inform whether there is a need to identify and allocate sites to meet any forecast need, in accordance with the advice set out in the NPPF (paragraph 86).

53. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT^{e} Model are described below.

BASE YEAR POPULATION AND PROJECTIONS

54. The 2025 ('base year') study zone population estimates and projections over the study period (to 2037) are informed by the Office of National Statistics' (ONS) 2018-based 'Sub-National Population Projections' (SNPP).

55. The calculations on population are set out in Table 1, Appendix C3.

56. Key population headlines:

- The total Study Area population is forecast to increase by over +39,375 persons (+5.7%) over the 12-year study period to 2037 from 692,597 to 731,972;
- The biggest population uplift will be experienced in Zone 1, which broadly covers the Royal Greenwich area, with an increase of +6.6% (+21,022) persons over the 12-year period.

EXPENDITURE PER CAPITA LEVELS AND FORECASTS

57. The baseline expenditure per capita ('per person') figures and forecasts are presented in Table 2 (Appendix C3) for convenience goods and Table 5 (Appendix C3) for comparison goods. The baseline (2025) average expenditure per capita figures have been derived from our in-house Experian Location Analyst (please note all expenditure and turnover figures are expressed in 2023 prices).

58. The growth in the expenditure per capita figures by zone is informed by the forecasts published in the latest Experian Retail Planner Briefing Note 22 (RPBN22); released in March 2025. As described in the main report, Experian forecast more limited year-on-year growth in retail expenditure than previous forecasts due to the impact of long-term economic and market trends, which have been further accelerated by the impact of the pandemic

SPECIAL FORMS OF TRADING

59. Special Forms of Trading (SFT) is deducted from the forecast retail (convenience and comparison) expenditure levels over the forecast period. For the purpose of this assessment, we have used the rates published by Experian in RPBN22.

60. SFT estimates are set out in Table 2 (Appendix C3) for convenience goods and Table 5 (Appendix C3) for comparison goods.

61. The SFT market shares have been adjusted to reflect the fact that a proportion of online convenience and comparison retail sales are sourced from traditional ('physical') stores rather than from dedicated ('dot com') warehouses. Experian assume 25% of SFT's market share for comparison goods and 70% for convenience goods are sales sourced from "physical" stores.

62. The baseline SFT market share identified in RPBN22 is 5.4% for convenience goods and 24.1% for comparison goods in 2025. These are forecast to increase to 7% and 28.6% respectively by the end of the study period (2037).

63. The Experian Insights transactions data identifies online transactions rather than the wider category of SFT. However, as online accounts for a significant proportion of SFT transactions we can assume that a similar pattern in SFT market share growth will apply to online market share.

TOTAL AVAILABLE EXPENDITURE

64. Tables 3 and 5 (Appendix C3) forecast the growth in total available convenience goods and comparison goods retail expenditure across the Study Area and zones up to 2037 (excluding SFT).

65. The tables for the ten-year period from 2025 to 2035 show that the increase in convenience goods expenditure is expected to be limited, with an overall increase of just +0.2% (£3.9m) across the whole of the study area. Over the 12-year period to 2037, expenditure is forecast to increase by 0.5% (+£8.3m). This limited growth is due to negative growth in annual expenditure per head forecast by Experian.

66. In contrast, comparison goods expenditure is forecast to experience strong growth, increasing by £464m (+26.6%) from 2025 to 2035. However, this has to be

seen in the context of the fluctuating levels of spend over the past 4 years. For example, comparison retail spend dipped significantly in the first year of the Covid pandemic before recovering in 2021 as restrictions eased. However, this was followed by a three-year decline in spend to 2024 as consumers held back on spending due to the cost-of-living crisis. Growth in comparison sales is only expected to occur from 2025 (+0.1%) with higher rates of annual growth from 2027 onwards (2.5% per annum and increasing to 2.6% from 2032).

MARKET SHARE ANALYSIS

67. The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres and stores both within the study area and outside. This is based on the Experian Insights data using the 'Supermarkets' category to provide the market shares for convenience goods and a combined market share for comparison goods categories.

68. The assessment is based on market shares identified for the Study Area. The market share analysis is set out in Tables 1 and 2 of Appendices B4 and B5.

69. The percentage market shares for convenience expenditure are set out in Table 2, Appendix C4 and the comparison market shares are set out in Table 2, Appendix C5, with the resulting turnover forecasts also provided, based on expenditure allocated from the Study Area only.

70. For the retail capacity assessment, and in line with accepted approaches, the market share analysis has been adjusted for both convenience goods and comparison goods to exclude SFT. The forecast turnovers are based on constant market shares, i.e. assuming no change in where people currently shop. This 'constant market share approach' is standard practice for strategic retail capacity assessments. This approach does not take account of the potential impact that new retail investment and development (both within and outside Royal Greenwich) can have on existing shopping patterns, market shares and turnover performance over time.

71. The monetary market shares identified for centres in the Study Area represent the estimated turnover from which capacity is identified. Forecast turnover for the future assessment years is estimated for 2030, 2035, and 2037.

72. Forecast convenience turnover for centres in the Study Area are presented in Tables 1 to 8 of Appendix C4 and summarised in Table 9 (Appendix C4). The corresponding tables for comparison turnover are presented in Appendix C5.

'RETAIL FLOORSPACE

73. The next stage in the retail capacity assessment is to take account of committed and planned retail (convenience and comparison) developments in Royal Greenwich. In theory this should include all permitted convenience and comparison floorspace that was not trading during the period the Experian Insights data relates to, but which is expected to be developed/opened in the future.

Developments completed and trading by mid-2024 are therefore not considered as their turnover will be included in the Experian Insights data.

74. In practice it is not possible to provide a definitive list of such commitments, which would be expected to be numerous because:

- Development proposals for sites within town centres are not required to submit as much detail regarding the retail and town centre uses elements of a scheme and therefore the exact quantum of retail floorspace may not be specified;
- Since the introduction of the 2020 Use Classes Order and specifically Class E, it is not necessary to specify the retail floorspace that will be included within a development;
- Even where a scheme is explicit in terms of the retail floorspace to be provided, it is not usually clear how much is likely to be for convenience uses and how much for comparison; and
- Permissions are usually valid for 3 years but not all will be implemented, whilst other older permissions may be partially implemented and therefore extant, but without the commercial elements completed.

75. For this assessment we have therefore sought to include the most significant proposals (300sqm and more), both in terms of location and the likely scale of retail floorspace. The following proposals have therefore been included, based on information sourced from the Council, and reasonable assumptions regarding the likely floorspace mix:

- **Modern Wharf, Tunnel Avenue, SE10 0NU (20/1730/0)** – outline planning permission was granted in June 2022 for a mixed-use redevelopment comprising: up to 1,500 residential dwellings; up to 17,311 (sqm GIA) of commercial floorspace (including retail, leisure and employment uses). The site is located on the western side of the Greenwich Peninsula and aims to create a new neighbourhood. The impact assessment in support of the application identified the potential to support a 1,500 sqm convenience store, which is accounted for within the capacity assessment; and
- **Extension to Argos Warehouse, Unit Peninsula Park Road, Charlton, SE7 7TZ (22/0002/F)** – planning permission was granted in April 2022 for the creation of additional 'retail' floorspace at mezzanine level. The mezzanine will create 313 sqm of new floorspace which is assumed to be entirely net sales area.

FLOORSPACE PRODUCTIVITY

76. A key input to the retail capacity assessment is the application of a year-on-year floorspace *'productivity'* growth rate to all existing and new retail floorspace. As described in the main report, existing retailers will need to achieve higher annual *'productivity'* growth rates to cover their increasing costs (including, for example,

rising rents, business rates and wages) and to remain profitable and viable over the short, medium and long term. This is particularly the case as the competition from online retailing increases; a trend that has been significantly accelerated by the impact of the pandemic.

77. Experian provides forecasts for productivity growth rates in the form of expected changes to retail sales densities (Figures 3 and 4), with two scenarios tested, assuming (i) constant floorspace and (ii) changing floorspace. For the purposes of this assessment we have used the 'constant' floorspace assumptions.

RETAIL CAPACITY ASSESSMENT

78. Our assessment of both convenience and comparison retail capacity is provided in Tables 10a to 11, Appendix C4 for convenience and Tables 10a to 11 (Appendix C5) for comparison.

79. The assessment is based on the assumption that retail market shares for Royal Greenwich (retained Study Area expenditure) and at centre level remain constant. In other words, capacity forecasts do not allow for potential changes to shopping patterns from those currently being seen.

80. Capacity forecasts are provided for the borough area as a whole and disaggregated for Royal Greenwich's main centres (or where transactional data was identified).

81. As a first step we have assessed a base capacity which consider capacity from a no-development scenario (excluding the turnover of pipeline development of new retail floorspace). The capacity results at borough level identify no capacity to support new convenience or comparison goods capacity over the entire study period.

82. The absence of capacity for convenience and comparison goods floorspace reflects:

- A lower rate of growth in retail expenditure per capita with negative growth for convenience goods expenditure.
- Higher rates of productivity/efficiency growth for existing retail floorspace which accounts for retailers seeking to improve the efficiency of their sales space to counter pressures from rising operational and supply costs.
- Increasing market share of online sales.

83. The inclusion of forecast turnover associated with committed or pipeline development of retail floorspace pushes capacity further into a decline position.

84. Given the absence of retail need, no consideration has been given to the potential to accommodate need within the existing stock of space, either through the reoccupation of vacant space or changes in the offer provided in existing units which would not require planning permission. If need was identified this step would be taken before considering the potential to identify sites.

85. It should be reiterated that the calculations for retail need assume that retail market shares identified based on patterns of spend over a 12-month period to

February 2025 remain unchanged. In reality, spending habits will alter as new retail trends emerge and as retail evolves both online and in centres. Significant demographic changes will also alter forecasts, particularly in areas of residential densification.

86. This point particularly resonates for areas of the borough where major regeneration proposals are coming forward, which could potentially alter centre market shares retail and other commercial town centre uses.

87. Therefore, while the NPPF requires need to be identified for retail over a minimum 10-year period, the likelihood is that the capacity findings for Royal Greenwich will change within that period. It is for this reason that evidence on retail spending habits should be updated every five years.

SUMMARY

88. The NPPF (paragraph 86d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by “looking at least ten years ahead”. The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments “…may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed”. Notwithstanding this, to help inform the Council’s longer-term plan-making and strategies we have assessed the potential capacity for new retail floorspace over the lifetime of the plan, up to 2037.

89. The assessment shows there is limited need at borough-level for new retail floorspace over the next ten years. Where capacity is identified at centre level, this is also limited in scale and can, in our view, be accommodated by the reoccupation of existing vacant units; the inclusion of the appropriate type of retail floorspace within committed or proposed developments or changes to the retail use of existing Class E floorspace.

90. However, where market demand presents an opportunity to improve the retail offer in Royal Greenwich’s centres then this should not be discounted on the basis that there is no or limited identified quantitative need. Where demand for new retail floorspace should arise over the plan period, then this should be directed the borough’s existing centres in accordance with the “town centre first” (sequential) approach detailed in national and local plan policy and guidance.

4. LEISURE NEEDS ASESSSMENT

91. Having considered how retail and shopping in town centres has changed in recent years in the previous section, this section focuses on the changing trends within the commercial leisure sector that may affect the demand for new leisure uses and facilities in Royal Greenwich over the plan period. This assessment necessarily focuses on the main leisure, entertainment and cultural uses identified as town centre uses in the NPPF (Annex 2), namely:

"…leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); … and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)." (NPPF, Annex 2)

NOTE ON FORECASTING NEED FOR COMMERCIAL LEISURE

92. Forecasting the need for new leisure uses is more problematic than for retailing, as the sector is highly complex and dynamic. The demand for existing and new leisure uses and facilities is particularly sensitive to changes in economic, demographic, lifestyle and fashion trends and those in the business are often unable to look more than a few months ahead.

93. From a planning policy perspective therefore the key to meeting future, as yet unknown needs, will be the development of policies that can accommodate the changing needs of the sector and can operate in the real world. This includes recognising that for many leisure uses the level for entering a new market will be relatively high and, unlike retail outlets where store size can vary significantly, incremental development is unlikely if only small increases in market growth are identified. For instance, a new cinema or bowling alley will need a certain number of screens or alleys to be commercially viable.

94. It is also the case that the recent changes to the Use Classes Order mean that the main commercial leisure sector in terms of spend – Food and Beverage encompasses both Class E and Sui Generis uses. As a result, any changing demand for restaurant and café uses is likely to be met by changing uses within the existing or committed town centre floorspace. This trend was already apparent before 2020 with many developments seeking permission for flexible A1/A3 uses but now, given that planning permission is not required to change between these uses.

95. In this context LSH has developed robust and transparent approaches to assess leisure needs based on the following key inter-related workstreams:

- A review of the key trends driving expenditure growth and market demand in the leisure sector over the last decade.
- An audit of existing leisure provision to help identify any significant 'gaps' in provision.

- An assessment of leisure expenditure generated by residents of the study area and Royal Greenwich.
- The application of a robust economic/quantitative need assessment for some leisure groups based on accepted approaches.

96. The assessment is informed by the review of leisure market trends for the different leisure categories, which are discussed in this section.

COMMERCIAL LEISURE TRENDS

97. Following a dramatic -36.3% fall in leisure spend per head in 2020, Experian forecasts showed a return to growth in 2021 (+29.5%) but a drop to -2.9% in 2023 and -1.6% in 2024. Thereafter there is nil forecast growth in 2025 before nominal growth emerging in 2026 (0.3%) and averaging at around 0.6% over the remainder of the study period. These expenditure growth trends, and forecasts, have informed the updated leisure needs assessment. Any further dampening of growth rates over the short to medium term will have implications for the viability of existing leisure businesses and the demand for new space.

98. The demand for leisure is currently dependent on broader economic conditions and prevailing consumer confidence. The key issues for commercial leisure provision in the post pandemic world encompass a number of factors, particularly:

- Macro-economic and resulting consumer sentiment (e.g., income growth, rising cost inflation, cost of living crisis);
- the rise in home working and benefiting local locations and businesses;
- changing consumer tastes and preferences (e.g. younger generation drinking less alcohol; prioritising experiences and prioritising spend);
- rise of home delivery; and
- the increase in the use of open spaces and pursuits; for example, the number of drive-in cinemas across the U.K. grew from three to 40 during the pandemic (Source: “U.K. Drive-Ins Boom in Pandemic Era With 40 New Cinemas”; Variety Magazine 21/07/2020).

99. Continuing uncertainty over inflation, future regulation and staffing levels is said to be causing a “crisis of confidence” among business owners, which has fallen to a lower level than at any point during the pandemic. The vulnerability of the sector due to soaring energy costs, crippling rises in the cost of goods and dampening consumer confidence is likely to affect the sector over the next few years further.

LEISURE EXPENDITURE OVERVIEW

100. The leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the sector has been significantly impacted by the pandemic, the fact is that leisure and entertainment activities

remain an important lifestyle and entertainment choice for many consumers over other areas of spending.

101. Expenditure on leisure items and activities is an important element of a household budget and it is estimated that in 2023, UK households spent in excess of £219 billion on such items including:

- Recreational and sporting services – i.e. services provided by sports stadia, racecourses, rinks, golf courses, pools, courts, bowling alleys, gyms, fairs, parks, dancing and skating;
- Cultural services – i.e. cinemas, theatres, concerts, circuses, TV rental, satellite subscription, video hire, hire of musicians, clowns, performers, photographers, film processing;
- Restaurants, cafes etc (F&B) – i.e. catering services, meals, alcohol, snacks and drinks sold by restaurants, pubs, cafes etc;
- Accommodation services – i.e. accommodation in hotels, motels, inns, “bed and breakfast” establishments, caravan sites, youth hostels, boarding schools, universities and other educational establishment accommodation; and
- Hairdressing salons & personal grooming – i.e. hairdressers, barbers, beauty shops and salons, men’s personal grooming centres, massage parlours, saunas, tanning centres.

102. An assessment of leisure expenditure for the Study Area and Royal Borough of Greenwich is presented in Appendix C5 and the findings are summarised below.

103. The table below sets out average expenditure per capita for residents within the Study Area and zones.

Table 5: Estimates of Expenditure per Capita on Leisure Services (2025)

	Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	£266	£357	£89	£117	£285	£1,760	£2,874
Zone 2	£281	£442	£129	£126	£406	£1,921	£3,305
Zone 3	£284	£387	£98	£116	£323	£1,856	£3,064
Study Area	£277	£395	£105	£120	£338	£1,846	£3,081
Royal Greenwich:	£266	£356	£88	£117	£284	£1,756	£2,867

Source: Table 3, Appendix C5

104. The table above shows that average spend on leisure services is dominated by Food and Beverage (‘F&B’), which includes cafés, restaurants and bars. F&B accounts for approximately 60% of all average spend per capita on leisure services in the Study Area. The proportion of expenditure per capita spent on F&B is slightly higher for Zones 1 and 3 (61%).

105. From a planning perspective this clearly shows the potential importance of spending on F&B for town centres, given much of that spend will, or has the potential to be spent in defined centres at all levels of the retail hierarchy. Cultural spend will be important for the larger centres, at the top of the hierarchy, whilst hairdressing and personal grooming services may generate less expenditure per head but are more likely to be spent locally.

106. As discussed above, spend generated by the residents of Royal Greenwich on accommodation services is not likely to be spent within the borough, but spend from visitors staying in Royal Greenwich or elsewhere whilst visiting the region, will be vital to supporting the hospitality market. Spend on recreational & sporting activities is likely to be less important for town centres as is spend on games of chance – the former due to the scale on expenditure on activities that will not be located in town centres and the latter due to the significance of online spend.

LEISURE EXPENDITURE FORECASTS

107. The base year expenditure per capita levels for leisure have been projected forward to 2037 using Experian's forecast annual growth rates above, and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services.

108. The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 22 (RPBN22); published in March 2025.

Table 6: Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2023	2024	2025	2026-40
Annual Leisure expenditure growth	-3.90%	-1.60%	0.00%	0.30%

Source: Retail Planner Briefing Note 22

109. In summary, leisure spend nationally is expected to increase by around 0.63% per annum between 2025 and 2037. This represents an improvement over time, with the period 1997 to 2021 having experienced a decline of -1.5% per annum. This takes account of a sharp drop in 2020 during the height of the COVID19 pandemic and subsequent spike in 2021 as leisure venues reopened. However, it should be noted that these quoted rates of expenditure are for total leisure expenditure. Expenditure for different types of leisure will experience different rates of growth during this period, with varying degrees of spend being made online.

110. Applying the forecast leisure expenditure per capita to the population projections results in an increase in total available commercial leisure expenditure across the defined Study Area of +10.5% (+£220.7m) by 2035; or by +15.4% (+£324.1m) over the entire study period to 2037.

111. The table below breaks down the growth in leisure expenditure by category. It shows that F&B expenditure between 2025 and 2035 in the study area is forecast to increase by +£132.2m (accounting for approximately 60% of the total growth) followed by cultural services (13%).

Table 7: Study Area: Total Forecast Growth in Available Commercial Leisure Expenditure: 2025 – 2037 (£m)

	2025	2030	2035	2037	Growth 2025-2035	Growth 2025-2037
Accommodation services	£189.0	£197.7	£208.9	£218.2	£19.8	£29.2
Cultural services	£269.5	£281.9	£297.8	£311.1	£28.3	£41.6
Games of chance	£71.8	£75.1	£79.3	£82.9	£7.5	£11.1
Personal grooming	£81.6	£85.4	£90.2	£94.2	£8.6	£12.6
Recreational & sporting services	£230.6	£241.2	£254.8	£266.2	£24.2	£35.6
Restaurants, cafes, bars, etc	£1,258.7	£1,316.3	£1,390.8	£1,452.8	£132.2	£194.1
Study Area	£2,101.3	£2,197.5	£2,321.9	£2,425.4	£220.7	£324.1

Source: Table 5, Appendix C5

112. Against this background of forecast leisure expenditure growth over the plan period, the following assessment identifies the potential quantitative and qualitative need for new commercial leisure uses in the centres across Royal Greenwich.

113. From a planning perspective this clearly shows the potential importance of spending on F&B for town centres, given much of that spend will, or has the potential to be spent in defined centres at all levels of the retail hierarchy. Cultural spend will be important for the larger centres, at the top of the hierarchy, whilst hairdressing and personal grooming services may generate less expenditure per head but are more likely to be spent locally.

114. As discussed above, spend generated by the residents of Royal Greenwich and the wider Study Area on accommodation services is not likely to be spent within the borough or study area, but spend from the considerable number of visitors staying in Royal Greenwich or elsewhere in London whilst visiting borough, will be vital to supporting the hospitality market. Spend on recreational & sporting activities is likely to be less important for town centres as is spend on games of chance – the former due to the scale on expenditure on activities that will not be located in town centres and the latter due to the significance of online spend.

115. As a result, the relevance of different leisure uses to town centres varies, as does the planning policy response:

- Most, if not all hairdressing and personal grooming premises will be considered as Class E uses, and therefore will be subject to the same planning policies as retail uses both within and outside town centres; and
- Demand for the development of new cultural and intensive sports uses will be market led and is likely to be linked to identified needs in a catchment area that will be defined by industry specific factors. As such, borough or district boundaries may or may not be a consideration.

116. However, a review of sector trends and information on the current position in Royal Greenwich is provided below for:

- Eating out /Food & Beverage (F&B) uses
- Cultural services
- Recreational and sporting services.

EATING AND DRINKING OUT

117. The food and beverage (F&B) sector includes restaurants, cafés, bars and pubs (former Class A3-A5). These uses are integral to a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching "dwell times" (i.e., the time people spend in centres), increasing "linked" expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

118. As identified previously, the F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend on F&B is also forecast to experience the greatest growth over the longer period (i.e. towards the end of the study period). In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of F&B uses across the Borough area. In reality though, this growth will be determined by current and future trends in the sector and market demand.

119. While multiple chains mainly dominated the expansion of the F&B sector up to 2017, casual dining sector multiples have struggled against a backdrop of increased competition, rising costs and a tightening of consumer spending due to wider Brexit and economic concerns. The reality is that too many F&B operators expanded too quickly into increasingly marginal locations, funded by private equity, and the market became saturated and unsustainable. The growth in the availability, convenience and speed of home deliveries driven by innovative technology and apps represents a further significant challenge to more traditional F&B operators.

120. These new challenges and pressures have resulted in a radical restructuring of businesses across the sector, resulting in the rationalisation of physical space. It is likely that there will be an increase in business failures and closures during 2024/25 as the impact of the pandemic, cost of living and energy costs on sales, profit margins and rising debts deepens. Experts predict that this further "shakeout" in the sector will leave the proactively managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer as the main "winners".

Food And Beverage Provision in Royal Greenwich

121. As expected, the borough's more visitor-oriented centres, namely Greenwich West (Greenwich Town Centre) and North Greenwich support a stronger F&B offer compared to the other centres with a good mix of cafes, restaurants, takeaways and bars/public houses.

122. The borough's two major town centres (Eltham and Woolwich) have notable differences in the scale and mix of F&B. The borough's district centres generally support a smaller variety of F&B uses.

123. The table below summarises F&B provision across Royal Greenwich's town and district centres:

Table 8: F&B Provision by Major Town and District Centre

	Bars, Pubs & Clubs	Cafes & Fast Food	Restaurants	Total
Eltham	8	24	14	46
Woolwich	9	58	22	89
Blackheath	4	12	12	28
Eltham	8	18	25	51
Greenwich East	2	22	12	36
Greenwich West (Greenwich Town Centre)	17	26	29	72
Lee Green	1	6	2	9
North Greenwich	8	18	25	51
Plumstead	2	22	8	32
Thamesmead	1	5	0	6

Source: Health Check Assessments, Volume B

LEISURE FOOD & DRINK SPEND PATTERNS IN ROYAL GREENWICH

124. Estimates on F&B expenditure for the Study Area and Royal Greenwich is set out in Table 6, Appendix C6.

125. Using population and expenditure per capita data on F&B (Table 3, Appendix C6) it is estimated that over £518.1m is generated by Royal Greenwich residents in 2025; increasing to £1,245.4m for the Study Area. Expenditure is forecast to potentially increase by +£74m (+14.3%) for the borough over the entire study period (2025 to 2037) and by +£162.6m (+13.1%) for the Study Area.

126. Using Experian Insights transaction data it is possible to identify the most popular destinations for F&B spend, which is based on purchases from branded and independent bakeries, cafes, and restaurants, takeaway outlets, and drinking venues.

127. The market share analysis on F&B based on transactional spend is set out in Table 1 in Appendix C7. The headline results are summarised in the following table and follow on paragraphs.

Table 9: Food & Drink Spend Market Shares Including Online Transactions

	Zone 1	Zone 2	Zone 3	Study Area
Abbey Wood Local Centre	0.10%	0.10%	0.01%	0.07%
Blackheath District Centre	3.16%	0.63%	1.48%	1.96%
Eltham Major Town Centre	1.79%	0.63%	0.52%	1.09%
East Greenwich District Centre	0.46%	0.03%	0.03%	0.21%
Greenwich Peninsula/ Shopping Park	1.53%	0.34%	0.30%	0.84%
Greenwich West District Centre	2.49%	0.50%	1.36%	1.60%
Kidbrooke Local Centre	0.11%	0.01%	0.01%	0.05%
Lee Green District Centre	0.00%	0.00%	0.00%	0.00%
North Greenwich District Centre	1.51%	0.69%	0.53%	1.00%
Plumstead District Centre	0.53%	0.14%	0.04%	0.28%
Thamesmead District Centre	0.95%	0.42%	0.03%	0.54%
Woolwich Major Town Centre	1.36%	0.21%	0.06%	0.66%
All Other	4.41%	1.37%	1.59%	2.74%
Zone 1 – Royal Greenwich	**18.39%**	**5.09%**	**5.96%**	**11.06%**
Centres Outside the Borough	32.47%	35.57%	40.19%	35.55%
Online	44.35%	40.99%	44.97%	43.56%
Total Market Share	100.00%	100.00%	100.00%	100.00%

Source: Table 1, Appendix C7

Note: Zone 1 broadly correlates to the administrative boundary for Royal Greenwich.

128. The analysis reveals that while Royal Greenwich's centres are drawing some spend on leisure F&B, the majority of resident spend goes to locations outside the borough, or online. Royal Greenwich as a whole retains 11% of F&B expenditure for the study area, increasing to 18.39% for Zone 1.

129. The assessment shows that Blackheath and Greenwich West (Greenwich Town Centre) attract the highest proportion of expenditure from Zone 1, albeit low in percentage terms.

130. It should be noted that the market shares exclude online transactions which will include takeaway/delivery orders from restaurants and takeaways via third party delivery platforms (e.g. Deliveroo, Just Eat, Uber Eats, etc). The market share turnover will be higher to some degree for some are all centres in the borough.

131. If online spending is excluded from the market share analysis for F&B then the percentage for retained expenditure increases to 33% for Zone 1. This assumes that all online transactions are linked to F&B outlets in Royal Greenwich, but in reality, a proportion will be generated by F&B outlets outside of the borough.

132. With the above caveats in mind, the market shares should be treated as indicative, but it can be assumed that retained F&B expenditure for the borough will range somewhere between 18.39% and 33%.

133. Forecasts on centre F&B turnover for the borough's centres is based on known transactions made in person and reflecting the market shares set out in the table above.

134. A clearer picture emerges on F&B market share for the borough's centres when we take account of F&B expenditure from domestic (UK) residents originating from outside the Study Area. The results show a considerable uplift in the turnover for most of the borough's centres.

135. The percentage uplift and corresponding turnover for 2025 and forecast years is presented in Tables 2-5 of Appendix C7. The results for 2025 is summarised below.

Table 10: Uplift in F&B Turnover from Expenditure Originating Beyond the Study Area in 2025

Retail Location	Study Area Spend £m	Study Area Inflow %	Study Area Inflow £m	Total Spend £m
Abbey Wood	£0.95	43.73%	£0.42	£1.37
Blackheath	£26.83	42.98%	£11.53	£38.36
Eltham	£14.73	20.76%	£3.06	£17.79
Greenwich East	£2.93	37.45%	£1.10	£4.02
Greenwich Peninsula & Charlton Riverside	£11.38	67.16%	£7.65	£19.03
Greenwich West	£21.95	147.20%	£32.31	£54.27
Kidbrooke	£0.72	37.80%	£0.27	£0.99
Lee	£0.00	0.00%	£0.00	£0.00
North Greenwich	£13.39	685.91%	£91.88	£105.27
Plumstead	£3.75	53.44%	£2.00	£5.76
Thamesmead	£7.09	25.78%	£1.83	£8.91
Woolwich	£8.97	47.86%	£4.29	£13.27
All Other	£37.10	84.71%	£31.43	£68.52
Zone 1 – Royal Greenwich	£149.79		£187.76	£337.55

Source: Table 2, Appendix C7

Note: Zone 1 broadly correlates to the administrative boundary for Royal Greenwich.

136. The analysis of F&B expenditure inflow for the base year and corresponding monetary values for 2025 and over a ten year period to 2035 shows that:

- F&B businesses in North Greenwich are experiencing a 686% increase in turnover from UK visitors resident outside the study area, which will reflect the draw of The O2 Arena complex. The uplift equates to £91.88m in F&B expenditure in 2025 and increases to £97.29m by 2035.
- Greenwich West (Greenwich Town Centre) follows with F&B businesses generating a 147% increase in turnover from UK residents residing outside the

study area. The value of this UK visitor expenditure inflow is £32.31m in 2025; increasing to £34.24m by 2035. The results reflect the centre's profile as a major tourist destination and the very strong F&B provision in the centre.

- F&B businesses in Greenwich Peninsula and Charlton Riverside generate a turnover uplift of 67%, which correlates with similar levels of expenditure uplift for retail (61% for convenience and comparison retail combined). The uplift equates to £7.65m in F&B expenditure in 2025 and increases to £8.1m by 2035.
- Blackheath experiences a 42.9% uplift in turnover inflow. While this percentage uplift is similar to other centres identified (Abbey Wood and Woolwich) the monetary value is considerably higher at £11.53m in 2025; increasing to £12.11m by 2035. The uplift in expenditure is likely to be influenced by visitors to Blackheath Common and the various events that take place there during the year. F&B provision is strong in the centre with many key brands trading there (e.g. The Ivy Café, Cote, Franca Manca, O'Neill's, etc) alongside a variety of independents. Of note, the percentage uplift in F&B turnover from inflow compares to the value for retail (43.6%).
- Woolwich and Abbey Wood are generating similar percentage values for expenditure inflow (48% and 44%, respectively), albeit representing different uplifts in monetary values. However, the similar percentage uplift could correlate to both centres being served by Crossrail and Abbey Wood's position on the eastern edge of the borough.
- F&B businesses in Eltham generate a 20.8% uplift in study area expenditure and equating to £3.06m in 2025 and forecast to increase to £3.24m by 2035. Interestingly, the town centre is generating a higher percentage uplift for F&B compared to retail (8.6%). The higher propensity for F&B spend over retail spend may relate to linked trade to day out visitor attractions (Eltham Palace and Gardens).
- Plumstead generates a 53% uplift in turnover, although the equating monetary value of £2m in 2025 is lower than Eltham, Woolwich and Blackheath. Nonetheless, the percentage uplift indicates the importance of visitor spend to the town, which may be influenced by the town's rail connections to locations beyond the study area and the draw of the centre's diverse and budget retail offering.
- Expenditure inflow to Kidbrooke and Greenwich East is similar in percentage (37%), but different monetary values (£0.27m and £1.1m, respectively). F&B expenditure inflow is notably higher for both centres than for retail and reflects a more service oriented function of the two centres.
- Finally, Thamesmead generates a percentage inflow of over 25% for F&B expenditure, equating to £1.83m in 2025 and increasing to £1.94m by 2035. F&B uplift is higher than for retail (18.8%), albeit the differences are lower than for many other centres in the borough.

137. The analysis shows that the borough's is retaining a relatively low proportion of F&B expenditure, with limited expenditure drawn from residents living in the wider study area. The most popular destinations in the borough based on retained Zone 1 and total study area expenditure are Blackheath and Greenwich West (Greenwich Town Centre), where F&B provision is strong.

138. However, while the borough is losing resident expenditure to locations outside the borough and beyond, businesses in Royal Greenwich are benefiting from a significant increase in turnover from UK visitors that reside beyond the study area.

139. As detailed previously this is a sector that has been significantly impacted prior to, and even more so, during the pandemic and the prevailing macro-economic position will also influence discretionary leisure spending. The sector is also under further pressure from the recent budget due to an increase in National Insurance Contributions. On this basis, it can be reasonably assumed that a proportion of any growth is likely to be absorbed by existing businesses to cover the debt incurred during the pandemic, rising operational / occupancy costs and inflation.

140. The growth to sustain new cafés, restaurants and bars will be very much subject to market demand. Focusing new uses in Royal Greenwich's town and district centres will help increase competition and consumer choice, and to underpin both daytime and evening economies. This is particularly the case for centres that do not benefit from intense interest from the market, such as Greenwich West (as discussed in Section 8).

CULTURAL SERVICES

141. Cultural services include theatres, cinemas, music venues, and museums which have an important role in providing education and promoting wellbeing to residents. These services can also have a key role in drawing visitors to a centre and help generate linked trade to other town centre businesses.

Expenditure on Culture/ Entertainment Services in Royal Greenwich

142. An assessment of expenditure on cultural and entertainment services is presented in Table 7 of Appendix C7 and is summarised in the table below for the Study Area and Royal Greenwich.

143. The table overleaf provides an overview of expenditure on entertainment and cultural activities by Study Area residents and residents of Royal Greenwich.

Table 11: Entertainment/Culture Spend in Royal Greenwich

	2025	2030	2035	2037	Growth 2025-2037 (£m)	Growth 2025-2037 (%)
Zone 1	£111.3	£117.7	£124.9	£127.9	£16.6	14.9%
Zone 2	£70.6	£73.8	£77.5	£79.1	£8.5	12.0%
Zone 3	£81.3	£85.4	£90.4	£92.5	£11.2	13.8%
Study Area	£263.2	£276.8	£292.8	£299.5	£36.3	13.8%
Royal Greenwich	£105.1	£111.2	£118.1	£120.9	£15.8	15.1%

Source: Table 7, Appendix C7

144. Spending on entertainment and cultural services is based on per capita rates of expenditure sourced from Experian. When applied to population projections it is estimated that Study Area residents generate £263.2m in available expenditure on culture and entertainment in 2025. Available expenditure is forecast to increase to +£36.3m (+13.8%) by 2037.

145. For Royal Greenwich, it is estimated that residents spend £119.6m on entertainment and cultural services in 2025, which is forecast to increase by +£23m (19.3%) by 2037.

146. As for F&B, it is reasonable to assume that a proportion of this expenditure uplift will be absorbed by existing businesses seeking to improve their trading position within what is a very competitive sector. However, the forecasts indicate potential to capture additional expenditure from population growth and potential opportunity to claw back expenditure lost to competing venues outside of the Borough.

Cinemas

147. The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of national multiples. Today the sectors offer ranges from larger multiplexes (any cinema with five screens or more, though some of the largest multiplex sites have as many as 12 or 16 screens), to smaller independent operators and ‘pop up’ venues.

148. Although year-on-year admissions and box-office takings are notoriously volatile - driven by the appeal of individual films and Hollywood ‘blockbusters’ - the long-term trend since the mid-1980s has been upward and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10-20 years is even more impressive when one considers that this has occurred against the increase in new and sophisticated in-home entertainment, driven by innovative technology, choice and flexibility (including online streaming platforms , for example, Sky, Netflix and Amazon Prime, Apple TV and Disney+ platforms).

149. There has also been a growth in smaller (Digital) cinemas serving smaller catchment areas. These Digital cinemas are more flexible and less “space-hungry,” as they do not require large auditoriums. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings

and shopping centres, or as part of a mixed-use offering. Other trends in the sector include the growth of ‘pop-up’ cinemas. Although there appears to be no dependable or recent data on the UK ‘pop-up’ cinema market.

150. The pandemic hit the cinema industry hard, particularly for the major chains. As previously mentioned, smaller nimble operators have found novel ways to show films. A temporary or mobile cinema (referred to as a pop-up cinema) such as drive-in cinemas and UK’s smaller independent chains, Curzon, Picture House (which is owned by Cineworld) and Everyman fared much better during the pandemic. They showed a more diverse selection of films, and with high-quality food offering, fully stocked bars and high-end seating, attracting more visitors during periods in which restrictions have eased.

151. The future growth in the sector is dependent on the levels of available discretionary spending. Cinema trips will remain a significant and popular leisure activity for all age groups. Notwithstanding this, the competition from home entertainment and alternative at-home film channels will intensify and cinema operators will have to keep updating and adapting their offer to respond to consumer needs.

152. Royal Greenwich has two major multiplex cinemas: Cineworld at The 02 (19 screens), and Odeon Greenwich (18 screens) at Millennium Leisure Park. The borough has two smaller multiplexes: Vue Cinema in Eltham (6 screens); and Picturehouse in Greenwich West (5 screens). Overall, the borough has four multiplex cinemas and a total of 48 screens.

153. It is noted that the borough has no boutique cinema venues.

154. In terms of capacity to support new screens, a high-level assessment of screen capacity indicates there is no need for additional screens based on regional screen density rates by population. The calculation is set out below and applies a screen density rate of 8.5 screens per 100,000 persons (based on the London region) against the borough’s population uplift over the study period.

155. The assessment indicates no need for additional screens over the ten-year period to 2035 or for the remainder of the assessment period.

Table 12: Indicative Cinema Screen Capacity

	2025	2030	2035	2037
Population – Royal Greenwich	297,306	306,321	314,369	317,503
Screen density per 100,000 people*	8.5	8.5	8.5	8.5
Screen potential	25	26	27	27
Existing screens	48	48	48	48
Odeon Luxe - 19 screens				
Odeon Greenwich – 18 screens				
Vue Cinema Eltham – 6 screens				
Picturehouse Greenwich - 5 screens				
Indicative screen capacity	-23	-22	-21	-21

Note: Screen density is for London as identified in the British Film Institute's Statistical Yearbook 2023

156. Screen capacity assessments do not necessary reflect how or where cinema operators target investment locations as operators can be willing to enter market locations where competitors are already trading. In the case of Royal Greenwich, existing cinema provision is largely confined to the west of the borough and Greenwich Peninsula. There may be potential to attract a small multiplex as part of development coming forward at Woolwich which could serve a eastern catchment for the borough.

157. Within the boutique cinema market there is demand for new venues, which are currently lacking in the borough. As Section 8 will detail, there are requirements from Everyman for sites in Blackheath and Greenwich West (Greenwich Town Centre).

Theatres and Music Venues

158. Performing arts venues such as theatres, concert halls and music venues help to enrich cultural experiences for residents. In addition, performing arts venues support town centre evening time economies of town centres and help support trade to other businesses sectors, such as F&B businesses.

159. Royal Greenwich has a number of performing arts venues, the most famous being the 02 Arena, which is an international attraction.

160. Smaller performing arts venues include the Old Bakehouse Theatre (Blackheath), Greenwich Theatre (Greenwich West), and The Little Fish Theatre (Greenwich East) and community theatres (e.g. Bob Hope Theatre in Eltham). There are a number of theatre venues in and around Woolwich including the Tramshed Theatre and the Bathway Theatre venue (part of the University of Greenwich). The Punchdrunk theatre company have a performance venue and rehearsal space at Royal Woolwich Arsenal.

The range of performing arts venues in the borough is considered to be good and we would not expect demand for additional provision based on demand from residents.

Gambling Venues

161. Spend on gambling ('games of chance') represents a relatively small proportion of the overall spend on leisure activities but includes a number of sectors that can be represented in town centres - bingo clubs, casinos, betting shops and amusement arcades. The latest research from The Gambling Commission (Industry Statistics April 2015 to March 2021) show that the gambling industry in Great Britain generated a Gross Gambling Yield (GGY) for the year end to March 2021 of £12.7bn. This represented a decline of 11% on the previous year (to March 2020), which in turn was slightly lower than seen in 2017 to 2019. Remote (online) gambling significantly increased during the year as a result of the pandemic.

162. The period from 2017 to March 2021 also saw a decline in the number of premises used for gambling purposes. Between March 2020 and March 2021, the overall

number of premises decreased by 1,502 (-14.8%) from 10,127 to 8,625. The majority of these (1,221) were due to a decline in non-remote betting but the period also saw the closure of 149 casinos, 82 arcades and 50 bingo venues. Between March 2017 and March 2021, the total number of licensed premises decreased by 2,779 (-24.4%) from 11,404 to 8,625.

163. In terms of the different types of gambling:

- **Bingo Halls -** in response to falling admissions over a number of years bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and growth in 'remote/online' gambling, which includes gambling activities through the internet, telephone, radio, etc. These trends have resulted in the closure of many bingo halls in centres across the UK with just 246 operating in March 2021 compared with 684 in 2017.
- **Casinos** – There has also been a significant decline in the number of casinos operating in the UK as a result of the growth of on-line activities. Of the 1,164 casinos operating in March 2017, only 117 remained by March 2021.
- **Betting Shops** – The number of high street betting shops has declined significantly in recent years, reflecting the increase in online betting and the merger and subsequent rationalisation of outlets by the main operators. As gambling activities continue their shift to online channels, so the demand for physical outlets will inevitably dampen in the future and betting shops will inevitably close. Notwithstanding this, the presence of betting shops in high streets is a contentious issue in any case due to the perceived social and economic impacts on households. The Government has recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to 'Sui Generis' and remain so under the new Use Class Order. This reclassification means local authorities have greater planning powers to manage the number of outlets and therefore greater potential to limit impacts.

Gambling Venues in Royal Greenwich

164. Royal Greenwich has no major casino venues with the nearest located in Westfield Stratford (Aspers). Instead, casino activities are represented by smaller 'high street' outlets with amusement style games and slot machines. Brands operating in the borough include Admiral and Merkur.

165. There is one bingo hall operating in the borough: Mecca Bingo in Eltham.

166. Betting offices are located across the Borough's centres, which a higher concentration in Woolwich (7 outlets). East Greenwich, Eltham and Plumstead each have three outlets, while Greenwich West (Greenwich Town Centre) and Thamesmead have one outlet.

167. Overall, Royal Greenwich is adequately served by gambling venues. There is no demonstrable need to enhance existing provision to improve competition and choice at the local level. Given that current trends for bingos and casinos show

activity moving online instead of physical venues, future demand for new venues is expected to be very limited. If demand does arise in the future, we advise that this should be directed to the town centres first in accordance with national and local plan policy.

RECREATIONAL AND SPORTING SERVICES

Health And Fitness Facilities

168. For town centre and urban areas, the key recreational and sporting services likely to be provided relate to health and fitness centres.

169. Pre-pandemic, the health and fitness market, including gyms and health clubs, was going from strength-to-strength, with the number of facilities in the UK increasing to 7,239 over the year to March 2019 (compared with 6,435 in 2016), and total membership growing by 4.7% to 10.4 million1. However, the pandemic had a significant impact on the health and fitness market when establishments were required to close during lockdown periods or operated at low capacity to meet social distancing requirements.

170. This resulted in the number of UK gyms declining from a 10-year peak of 3,674 in 2020 to an estimated 3,060 in 2021. The impact is even more pronounced on the sector's market value. Pre-pandemic the sector market value was steadily increasing annually; peaking at £2.25 billion compared to £1.49 billion in 2012. The impact of the pandemic led to market value dropping to £1.32 billion in 2021. However, early figures for 2022 indicate that market value has risen to £1.8 billion while the number of gyms has risen to 3,720, which is higher than pre-pandemic levels. This is a positive sign that the market is recovering, although, there are now uncertainties on how much the sector will grow in light of the current cost of living crisis.

171. Nonetheless, gyms and health/fitness facilities make an important contribution to the health and well-being of the population across all age levels. The table overleaf shows the top 10 operators in the health and fitness sector, ranked by number of facilities (as of 2020).

[1] *State of the UK Fitness Industry Report* (2019). Leisure DB (formerly the Leisure Database Company). The research is compiled by independent leisure market analysts,

Table 13: Main gym operators in the UK

Operator/Brand:	No. UK Facilities	Price Position	
Pure Gym	250+	Budget	Most locations are open 24 hours and offer cardio equipment, fixed/free weights and exercise classes.
Anytime Fitness	166	Budget	24-hour health and fitness club. Operates on a franchise system.
The Gym Group	159	Budget	24-hour access. No fixed contract. Membership starts from £10.99/month.
Snap Fitness	123	Mid-Market	Established in 2003. A privately owned and operated club. Operates on a franchise system.
David Lloyd	112	Premium	Provide a family-orientated, high-quality fitness and leisure facility.
Nuffield Health	111	Mid-Market	Membership rates vary by club and locations, but start from circa £60/month.
Energie Group	100+	Mid-Market	Clubs are typically between 5,000-25,000 sqft. Operates on a franchise system.
Bannatyne's	70	Premium	Also operates 37 spas and five hotels across the UK.
Exercise4Less	50+	Budget	Offer a full boxing ring and combat classes. Membership starts from £9.99/month off-peak.

Source: LSH Research

172. Other major operators just outside the top 10 include Virgin Active, JD Gyms, Sports Direct and Total Fitness.

173. The structure of the UK health and fitness industry has evolved significantly over the last decade to reflect changes in consumer choice and trends, with value and budget gym operators having experienced the most significant growth in the sector in recent years.

174. According to figures by Leisure DB budget gyms now account for over one-third of gym memberships in the UK. The growth of the budget gym operators has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap nor particularly exclusive will struggle to maintain market share in the competitive market place unless they revise their business models.

175. Royal Greenwich has a broad offer in gym and fitness outlets, with a reasonable mix of mainstream gym operators, independents, and niche and boutique formats. Geographically, there is a notable concentration of gym facilities north of Greenwich West (Greenwich Town Centre) and along the riverside.

176. The borough's representation of key gym and fitness operators is presented in the table below:

Table 14: Key gym brands in Royal Greenwich

Operator	Location
David Lloyd	Kidbrooke
PureGym	Charlton Riverside, Greenwich West (Greenwich Town Centre)
Snap Fitness	Eltham, Greenwich West (Greenwich Town Centre)
Anytime Fitness	Charlton Riverside
The Gym Group	Greenwich West (Greenwich Town Centre)

Source: LSH

177. There are a number of major brands that are not present in the borough, such as Fitness First, Nuffield, and Bannatyne.

178. Looking beyond traditional major gym operators, many new fitness formats have emerged in London in the past 10 years. Recent examples of new gym formats include dedicated gyms for high intensity training, spin (stationary cycling), rowing, padel tennis, and non-competitive boxing. Some of these formats are operating in Greenwich with major brands/franchises including Crossfit (Banning Street), although F45, a London-wide franchise is notably absent. A padel tennis facility is located at The 02 alongside a number of other independent fitness studios (e.g. Outrivals, and The Hour).

179. The borough has a broad range of wellbeing leisure facilities such as yoga, Pilates and reformer pilates studios, with a high concentration around Greenwich West (Greenwich Town Centre), and East Greenwich.

180. In addition to private gym and fitness studios, there are a number of public sector owned run leisure centres located across the borough that are operated by Better (a charitable social enterprise), including:

- The Greenwich Centre, Lambrade Square
- Waterfront Leisure Centre, Woolwich High Street
- Charlton Lido and Lifestyle Club
- The Plumstead Centre, Plumstead High Street
- The Eltham Centre, Archery Road, Eltham
- Sutcliffe Park Sports Centre, Eltham Road, Eltham
- Thamesmere Leisure Centre, Thamesmere Drive, Thamesmead
- Coldharbour Leisure Centre, Chapel Farm Road, Eltham

181. Generally, it is considered that Royal Greenwich has a reasonably good provision of health, gym and fitness facilities, although there are notable brands that are absent. We discuss the potential to attract new gym brands in Section 8.

Other Commercial Leisure

182. Other commercial leisure facilities are often classified as 'family entertainment venues' (FEVs), which include paid activities that appeal to adults and children (such as, for example, tenpin bowling, roller skating, ice skating, and similar uses).

183. Tenpin bowling is possibly the most popular activity in the 'family entertainment' sector. After a period of decline in the 1970s, there are now 316 venues in the UK according to Mintel figures. The UK tenpin bowling market was valued at £285m in 2017. This represented a +9.7% year-on-year growth and represented the fifth consecutive year of growth. A number of the successful bowling facilities opened over the last 15-20 years (e.g. Hollywood Bowl and Ten Entertainment) tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. The critical mass of leisure uses "under one roof" help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. The sector is evolving from old-style bowling alleys, to modern, multi-generational entertainment centres where bowling is blended with other forms of activity alongside an enhanced dining offer, along with smaller independent specialist bowling facilities.

184. Royal Greenwich has one major ten pin bowling venue, Hollywood Bowl at The 02 and a smaller independent venue; Vintner Lanes in Greenwich West (Greenwich Town Centre). The nearest competing venues are in Lewisham (Lewisham Lanes) and Bexleyheath (Tenpin).

185. Given the draw of leisure attractions at The 02 and the proximity of competing venues outside of the borough, there is unlikely to be demand to support a new standalone ten pin bowling venue in Royal Greenwich. Instead, there is more likely to be demand for additional ten pin bowling facilities that form part of multi-activity venues.

186. Over recent years there has also been growth in other more specialist commercial leisure attractions, such as trampoline parks. Trampolining has become one of the UK's fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250-300 parks before saturation is potentially reached. The main operators in this sector include Oxygen Freejumping, Ryze, and Gravity Active Entertainment. There is also an emerging market in multi-activity leisure venues promoted by niche operators that offer a range of activity leisure uses under one roof. Examples include venues that include skateboard, snowboarding, BMX, free Ski, parkour, and climbing activities, alongside other activities. Active leisure venues such as those described above typically attract wider families and groups, who are generating 'spin-off' expenditure to other uses and facilities both within and outside the venues.

187. The 02 Arena has expanded to include new family and active leisure attractions including a trampoline park (Oxygen) and the recently opened indoor skydiving venue (iFLY). Other family and active leisure venues in the borough include Greenwich Peninsula Golf Range and Miniature Putting (Tunnel Avenue), Laser

Quest (Merryweather Place); and The Reach Climbing Wall (Mellish Industrial Estate).

188. There are also various leisure experiences that are aimed at the visitor market such as climbing experiences at The 02 Arena (Up at The 02) and The Cutty Sark.

189. Royal Greenwich also has a number of ‘pay as you go’ indoor adventure/ soft play centres for children (Avo Softplay & Kids Playroom, AvoCuddle Playroom, Playville Toys Game Centre at artfix, Kubz Klub, Kids PlayNow).

190. More recently new activities are emerging and locations such as virtual reality experiences and competitive socialising activities that blend activities with F&B provision. The latter has expanded to most larger centres in the UK.

191. Despite the rising popularity of competitive socialising activities, provision is limited to two operators at The 02: Boom Battle Bar (axe throwing) and TOCA Social Club (football games), both at The 02) which offers axe throwing, gaming, escape rooms, and bouldering facilities.

SUMMARY

192. This section has shown that the commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending, but new activities and innovative offers will continue to evolve and attract people.

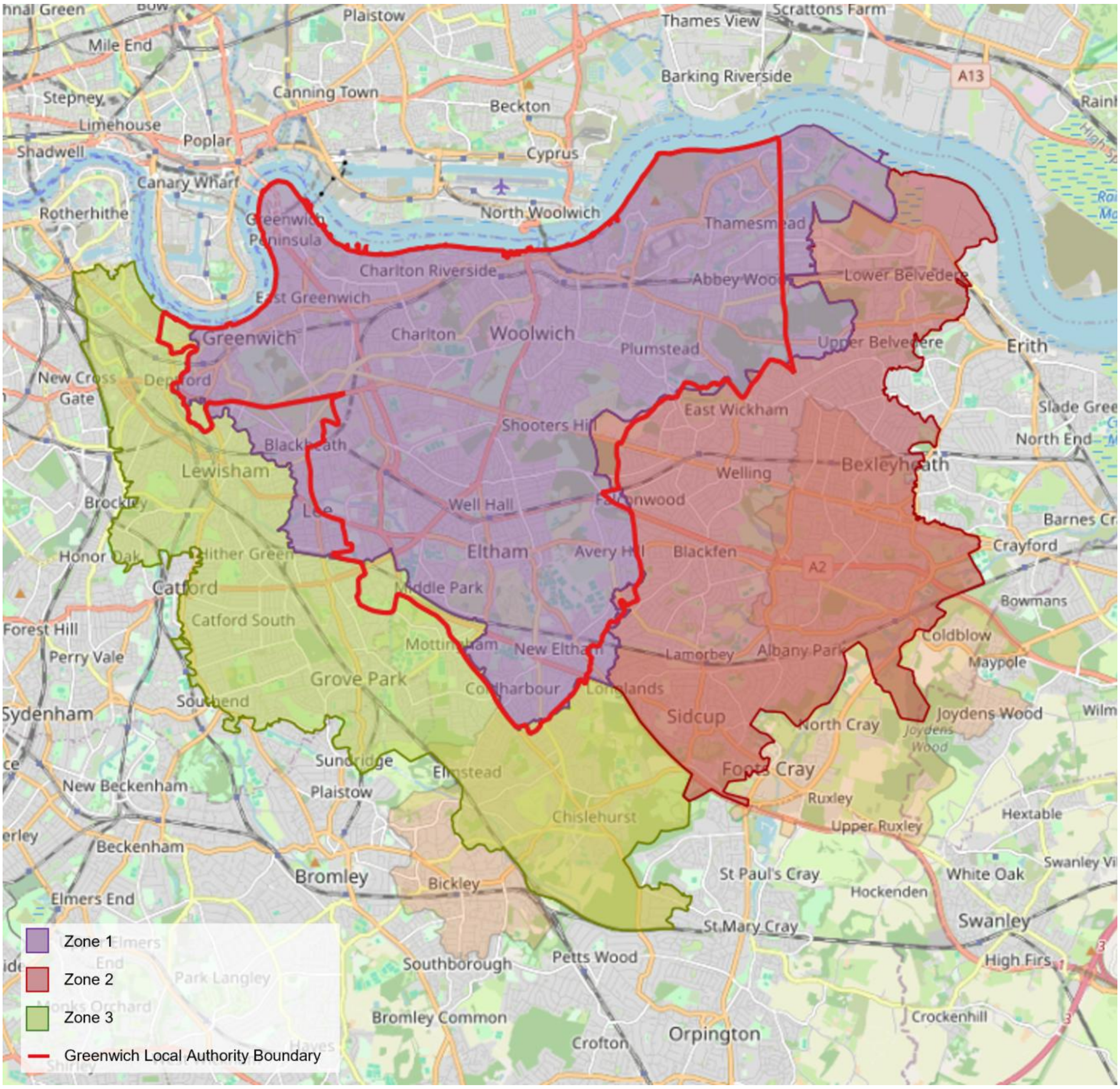
193. However, there will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future will be how to attract customers away from their homes.

194. Royal Greenwich supports a strong catchment to support continued investment and market interest from new commercial leisure operators. Further demand will come forward in areas of the borough that attract strong visitor numbers (e.g. Greenwich West (Greenwich Town Centre) and North Greenwich) and high footfall areas close to underground and rail stations (e.g. Woolwich, Eltham, Abbey Wood) and close to popular local amenities (e.g. Blackheath). For Woolwich in particular, the major regeneration proposals coming forward are expected to stimulate interest from new retail and leisure operators.

195. Generally, opportunities to support the repurposing of vacant or under-utilised retail and commercial units should be encouraged across all of the borough’s centres.

APPENDIX C1 STUDY AREA

Plan 1: Study Area and Zones



APPENDIX C2 EXPERIAN INSIGHTS RAW DATA

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TABLE 1: SUPERMARKET TRANSACTIONS (£)

		Customer Location					
Merchant location	**Retail Location**	**Greenwich Zone 1**	**Greenwich Zone 2**	**Greenwich Zone 3**	**Total Study Area**	**Out of Area customers**	**Total Expenditure**
Zone 1	Abbey Wood	23,643.29	7,238.66	98.22	30,980.17	6,139.84	37,120.01
Zone 1	Blackheath (London)	28,478.53	1,430.28	3,183.35	33,092.16	7,758.09	40,850.25
Zone 1	Eltham	782,643.74	151,357.13	112,365.09	1,046,365.96	97,106.45	1,143,472.41
Zone 1	Greenwich East	282,248.96	4,824.92	6,238.92	293,312.80	48,384.46	341,697.26
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	913,523.42	68,702.38	79,582.22	1,061,808.02	281,494.14	1,343,302.16
Zone 1	Greenwich Village	286,823.80	7,760.65	53,394.42	347,978.87	177,223.71	525,202.58
Zone 1	Kidbrooke	1,012,928.40	75,990.95	150,423.46	1,239,342.81	101,057.59	1,340,400.39
Zone 1	Lee	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	North Greenwich	61,063.75	5,934.73	3,980.48	70,978.96	152,343.12	223,322.08
Zone 1	Plumstead	134,958.28	8,204.02	1,542.89	144,705.19	15,994.63	160,699.82
Zone 1	Thamesmead	208,276.53	49,928.48	1,610.23	259,815.24	50,837.48	310,652.72
Zone 1	Woolwich	1,085,724.06	50,433.53	17,882.59	1,154,040.18	226,063.63	1,380,103.81
Zone 1	All Other	5,203,951.02	544,973.58	423,438.11	6,172,362.71	976,492.76	7,148,855.47
Zone 1	Total	10,024,263.78	976,779.31	853,739.98	11,854,783.07	2,140,895.90	13,995,678.96
Zone 2	Bexley	2,057.27	68,950.46	310.75	71,318.48	22,606.06	93,924.54
Zone 2	Bexleyheath	101,129.25	942,279.36	6,872.25	1,050,280.86	676,398.40	1,726,679.26
Zone 2	Sidcup	310,278.50	2,310,235.96	162,112.54	2,782,627.00	566,480.80	3,349,107.80
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Welling	507,631.94	1,548,469.79	13,711.96	2,069,813.69	192,323.35	2,262,137.04
Zone 2	All Other	421,437.96	3,096,863.73	18,447.89	3,536,749.58	738,784.52	4,275,534.10
Zone 2	Total	1,342,534.92	7,966,799.30	201,455.39	9,510,789.61	2,196,593.13	11,707,382.74
Zone 3	Catford	11,577.82	2,140.65	299,208.93	312,927.40	196,991.85	509,919.25
Zone 3	Catford - Bromley Road Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Chislehurst	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Deptford	30,159.17	1,742.97	273,896.80	305,798.94	83,400.59	389,199.53
Zone 3	Downham	0.00	0.00	29.76	29.76	444.54	474.30
Zone 3	Lewisham	626,478.25	40,529.92	1,890,078.03	2,557,086.20	666,598.99	3,223,685.19
Zone 3	All Other	341,528.08	42,356.79	2,632,296.88	3,016,181.75	1,170,289.86	4,186,471.62
Zone 3	Total	1,009,743.32	86,770.33	5,095,510.40	6,192,024.05	2,117,725.83	8,309,749.89
Out of Area	London West End	146,186.99	68,977.32	124,026.03	339,190.34		
Out of Area	London City	199,665.36	116,362.83	162,103.92	478,132.11		
Out of Area	London Bridge	77,658.41	42,037.98	107,997.98	227,694.37		
Out of Area	Canary Wharf	236,522.58	43,000.60	90,103.50	369,626.68		
Out of Area	Bluewater	1,476.01	1,468.87	518.38	3,463.26		
Out of Area	Catford	40,024.17	11,072.48	787,400.03	838,496.68		
Out of Area	Petts Wood	16,458.21	10,137.51	65,458.03	92,053.75		
Out of Area	Beckenham	9,355.32	3,650.76	52,475.90	65,481.98		
Out of Area	Brixton	17,102.11	4,252.89	18,107.90	39,462.90		
Out of Area	Downham	6,037.65	1,095.47	98,193.69	105,326.81		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	26,445.95	107,131.47	24,142.92	157,720.34		
Out of Area	All Other	3,869,407.21	5,049,181.88	5,571,046.08	14,489,635.17		
Out of Area	Total	4,646,339.97	5,458,370.06	7,101,574.36	17,206,284.39		
Online Expenditure		3,651,026.78	3,853,300.34	2,326,681.23	9,831,008.35		
Total Expenditure		20,673,908.77	18,342,019.34	15,578,961.36	54,594,889.47	6,455,214.86	34,012,811.59

Lambert Smith Hampton

TABLE 2: COMPARISON RETAIL TRANSACTIONS (£)

		Customer Location					
Merchant location	**Retail Location**	**Greenwich Zone 1**	**Greenwich Zone 2**	**Greenwich Zone 3**	**Total Study Area**	**Out of Area customers**	**Total Expenditure**
Zone 1	Abbey Wood	43,291.89	21,919.29	839.58	66,050.76	19,236.02	85,286.78
Zone 1	Blackheath (London)	178,879.73	5,451.64	63,461.89	247,793.26	114,553.59	362,346.85
Zone 1	Eltham	1,453,101.81	410,416.01	223,916.13	2,087,433.95	179,462.05	2,266,896.00
Zone 1	Greenwich East	108,404.14	153.22	383.17	108,940.53	3,731.96	112,672.49
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	2,435,134.08	538,563.08	463,226.25	3,436,923.41	4,605,203.80	8,042,127.20
Zone 1	Greenwich Village	206,689.95	9,394.28	65,197.87	281,282.10	110,064.66	391,346.76
Zone 1	Kidbrooke	23,676.83	96.77	17.57	23,791.17	943.75	24,734.92
Zone 1	Lee	32,449.96	553.83	27,552.89	60,556.68	6,372.51	66,929.19
Zone 1	North Greenwich	173,160.07	36,511.40	41,489.34	251,160.81	350,327.15	601,487.96
Zone 1	Plumstead	40,252.99	4,806.32	487.67	45,546.98	17,680.31	63,227.29
Zone 1	Thamesmead	104,577.68	25,917.37	642.64	131,137.69	20,800.01	151,937.70
Zone 1	Woolwich	647,945.73	51,358.79	20,771.58	720,076.10	165,904.34	885,980.44
Zone 1	All Other	1,128,215.55	274,793.52	221,287.75	1,624,296.82	357,584.72	1,981,881.54
Zone 1	Total	6,575,780.41	1,379,935.52	1,129,274.33	9,084,990.26	5,951,864.87	15,036,855.12
Zone 2	Bexley	1,756.61	31,696.54	660.28	34,113.43	37,196.53	71,309.96
Zone 2	Bexleyheath	529,729.31	2,356,810.82	32,136.94	2,918,677.07	1,429,324.53	4,348,001.60
Zone 2	Sidcup	12,047.41	144,365.22	5,718.12	162,130.75	43,845.46	205,976.21
Zone 2	Sidcup - Crittalls Corner Retail Park	38,531.32	217,502.98	71,559.10	327,593.40	459,654.55	787,247.95
Zone 2	Welling	17,380.18	97,338.91	756.73	115,475.82	20,540.37	136,016.19
Zone 2	All Other	197,927.29	459,960.99	15,847.83	673,736.11	253,059.95	926,796.06
Zone 2	Total	797,372.12	3,307,675.46	126,679.00	4,231,726.58	2,243,621.39	6,475,347.97
Zone 3	Catford	3,351.01	1,513.36	49,275.00	54,139.37	41,496.05	95,635.42
Zone 3	Catford - Bromley Road Retail Park	11,082.84	499.21	50,459.50	62,041.55	111,574.93	173,616.48
Zone 3	Chislehurst	2,418.01	519.44	27,455.16	30,392.61	7,459.03	37,851.64
Zone 3	Deptford	0.00	0.00	26.21	26.21	0.00	26.21
Zone 3	Downham	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Lewisham	305,188.31	29,477.07	942,538.94	1,277,204.32	818,696.83	2,095,901.15
Zone 3	All Other	79,053.69	40,405.87	411,819.72	531,279.28	331,435.74	862,715.02
Zone 3	Total	401,093.86	72,414.95	1,481,574.53	1,955,083.34	1,310,662.58	3,265,745.92
Out of Area	London West End	1,019,867.23	358,535.52	859,249.19	2,237,651.94		
Out of Area	London City	370,558.97	155,348.04	294,020.31	819,927.32		
Out of Area	London Bridge	79,356.25	33,355.61	90,698.01	203,409.87		
Out of Area	Canary Wharf	266,484.32	52,633.07	120,899.46	440,016.85		
Out of Area	Bluewater	1,481,200.17	2,281,068.04	515,730.53	4,277,998.74		
Out of Area	Catford	5,228.84	2,471.45	113,418.99	121,119.28		
Out of Area	Petts Wood	559.61	581.03	4,469.10	5,609.74		
Out of Area	Beckenham	1,445.57	778.47	8,672.56	10,896.60		
Out of Area	Brixton	5,774.96	1,715.73	10,856.65	18,347.34		
Out of Area	Downham	1,412.75	366.83	43,122.32	44,901.90		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	60,781.62	120,060.89	17,588.54	198,431.05		
Out of Area	All Other	4,432,179.92	3,717,894.88	5,059,637.98	13,209,712.78		
Out of Area	Total	7,724,850.21	6,724,809.56	7,138,363.64	21,588,023.41		
Online Expenditure		11,326,651.16	7,849,418.88	7,730,886.77	26,906,956.81		
Total Expenditure		26,825,747.76	19,334,254.37	17,606,778.27	63,766,780.40	9,506,148.84	24,777,949.01

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TABLE 3: MULTI-GOODS RETAIL TRANSACTIONS (£)

		Customer Location					
Merchant location	**Retail Location**	**Greenwich Zone 1**	**Greenwich Zone 2**	**Greenwich Zone 3**	**Total Study Area**	**Out of Area customers**	**Total Expenditure**
Zone 1	Abbey Wood	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Blackheath (London)	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Eltham	1,642,675.07	391,662.00	239,928.68	2,274,265.75	188,904.18	2,463,169.92
Zone 1	Greenwich East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	4,512,753.62	411,037.06	401,753.63	5,325,544.31	1,127,496.60	6,453,040.91
Zone 1	Greenwich Village	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Kidbrooke	230,814.50	30,036.85	46,875.67	307,727.02	34,560.78	342,287.80
Zone 1	Lee	928,496.84	18,442.01	922,445.59	1,869,384.44	134,752.60	2,004,137.03
Zone 1	North Greenwich	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Plumstead	29,884.11	2,356.30	410.78	32,651.19	4,182.21	36,833.40
Zone 1	Thamesmead	135,092.98	58,427.45	1,872.34	195,392.77	38,625.01	234,017.78
Zone 1	Woolwich	1,515,662.40	81,080.92	43,059.81	1,639,803.13	248,848.78	1,888,651.90
Zone 1	All Other	828,397.21	500,023.26	7,564.25	1,335,984.72	178,325.58	1,514,310.30
Zone 1	Total	9,823,776.73	1,493,065.85	1,663,910.75	12,980,753.33	1,955,695.74	14,936,449.04
Zone 2	Bexley	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Bexleyheath	233,618.28	1,732,353.17	16,092.66	1,982,064.11	834,312.32	2,816,376.43
Zone 2	Sidcup	6,062.56	55,169.25	2,014.59	63,246.40	16,242.28	79,488.68
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Welling	418,954.63	1,615,872.55	11,933.72	2,046,760.90	229,020.74	2,275,781.63
Zone 2	All Other	284,547.55	672,905.00	5,725.76	963,178.31	472,237.99	1,435,416.30
Zone 2	Total	943,183.02	4,076,299.97	35,766.73	5,055,249.72	1,551,813.33	6,607,063.04
Zone 3	Catford	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Catford - Bromley Road Retail Park	8,423.21	2,670.89	137,177.44	148,271.54	247,356.92	395,628.46
Zone 3	Chislehurst	246,131.38	24,662.36	1,212,998.57	1,483,792.31	268,975.80	1,752,768.10
Zone 3	Deptford	373.88	21.67	627.73	1,023.28	638.41	1,661.69
Zone 3	Downham	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Lewisham	97,206.45	8,599.03	286,881.74	392,687.22	206,699.26	599,386.48
Zone 3	All Other	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Total	352,134.92	35,953.95	1,637,685.48	2,025,774.35	723,670.39	2,749,444.73
Out of Area	London West End	0.00	0.00	0.00	0.00		
Out of Area	London City	0.00	0.00	0.00	0.00		
Out of Area	London Bridge	0.00	0.00	0.00	0.00		
Out of Area	Canary Wharf	0.00	0.00	0.00	0.00		
Out of Area	Bluewater	0.00	0.00	0.00	0.00		
Out of Area	Catford	1,478.79	184.38	21,653.69	23,316.86		
Out of Area	Petts Wood	0.00	0.00	0.00	0.00		
Out of Area	Beckenham	0.00	0.00	0.00	0.00		
Out of Area	Brixton	461.62	102.07	615.00	1,178.69		
Out of Area	Downham	0.00	0.00	0.00	0.00		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	413,670.96	1,277,266.75	353,062.73	2,044,000.44		
Out of Area	All Other	185,887.11	297,678.91	480,680.45	964,246.47		
Out of Area	Total	601,498.48	1,575,232.11	856,011.87	3,032,742.46		
Online Expenditure		6,896.08	4,994.09	2,423.39	14,313.56		
Total Expenditure		11,727,489.23	7,185,545.97	4,195,798.22	23,108,833.42	4,231,179.46	24,292,956.81

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TABLE 4: LEISURE FOOD & BEVERAGE TRANSACTIONS (£)

		Customer Location					
Merchant location	**Retail Location**	**Greenwich Zone 1**	**Greenwich Zone 2**	**Greenwich Zone 3**	**Total Study Area**	**Out of Area customers**	**Total Expenditure**
Zone 1	Abbey Wood	12,152.87	7,758.80	446.40	20,358.07	8,903.41	29,261.48
Zone 1	Blackheath (London)	373,032.78	49,921.64	114,924.92	537,879.34	231,156.08	769,035.42
Zone 1	Eltham	211,378.09	49,269.17	40,083.08	300,730.34	62,427.53	363,157.87
Zone 1	Greenwich East	54,029.05	2,534.51	2,350.45	58,914.01	22,061.54	80,975.55
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	180,564.82	26,912.28	23,572.49	231,049.59	155,171.82	386,221.41
Zone 1	Greenwich Village	293,764.23	39,373.47	105,839.89	438,977.59	646,193.47	1,085,171.06
Zone 1	Kidbrooke	12,959.64	901.45	590.38	14,451.47	5,463.23	19,914.70
Zone 1	Lee	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	North Greenwich	178,535.09	54,665.88	41,565.27	274,766.24	1,884,659.21	2,159,425.45
Zone 1	Plumstead	62,613.90	11,180.03	3,089.93	76,883.86	41,086.08	117,969.94
Zone 1	Thamesmead	112,353.77	33,272.83	1,959.94	147,586.54	38,048.44	185,634.98
Zone 1	Woolwich	160,679.02	16,632.42	5,021.89	182,333.33	87,261.18	269,594.51
Zone 1	All Other	520,856.39	108,267.01	123,860.58	752,983.98	637,860.09	1,390,844.07
Zone 1	Total	2,172,919.65	400,689.49	463,305.22	3,036,914.36	3,820,292.08	6,857,206.44
Zone 2	Bexley	2,453.76	35,297.37	781.97	38,533.10	33,187.13	71,720.23
Zone 2	Bexleyheath	84,436.70	365,969.78	8,233.58	458,640.06	406,049.07	864,689.13
Zone 2	Sidcup	33,719.13	227,192.01	15,923.18	276,834.32	136,491.96	413,326.28
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Welling	45,497.28	153,047.66	3,337.87	201,882.81	52,235.85	254,118.66
Zone 2	All Other	158,738.85	564,423.52	19,199.19	742,361.56	471,923.70	1,214,285.26
Zone 2	Total	324,845.72	1,345,930.34	47,475.79	1,718,251.85	1,099,887.71	2,818,139.56
Zone 3	Catford	6,286.89	2,693.21	43,474.30	52,454.40	58,728.57	111,182.97
Zone 3	Catford - Bromley Road Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Chislehurst	47,327.64	43,185.59	159,972.37	250,485.60	193,989.30	444,474.90
Zone 3	Deptford	3,582.52	269.53	14,948.50	18,800.55	14,760.24	33,560.79
Zone 3	Downham	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Lewisham	45,461.67	6,767.95	116,300.26	168,529.88	147,523.02	316,052.90
Zone 3	All Other	136,810.65	46,739.91	309,316.67	492,867.23	533,824.02	1,026,691.25
Zone 3	Total	239,469.37	99,656.19	644,012.10	983,137.66	948,825.15	1,931,962.81
Out of Area	London West End	607,456.22	319,394.01	457,151.99	1,384,002.22		
Out of Area	London City	434,088.05	273,538.02	320,366.29	1,027,992.36		
Out of Area	London Bridge	219,708.87	131,041.34	200,526.78	551,276.99		
Out of Area	Canary Wharf	172,524.89	65,078.21	78,276.11	315,879.21		
Out of Area	Bluewater	187,145.10	325,411.44	70,016.20	582,572.74		
Out of Area	Catford	8,073.27	2,030.77	44,884.92	54,988.96		
Out of Area	Petts Wood	2,689.47	3,786.80	11,019.54	17,495.81		
Out of Area	Beckenham	4,644.77	3,651.14	12,369.55	20,665.46		
Out of Area	Brixton	3,732.91	2,255.45	6,002.88	11,991.24		
Out of Area	Downham	1,110.32	307.85	7,758.79	9,176.96		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	3,985.71	9,799.57	2,627.28	16,412.56		
Out of Area	All Other	2,191,068.33	1,664,749.31	1,915,383.79	5,771,201.43		
Out of Area	Total	3,836,227.91	2,801,043.91	3,126,384.12	9,763,655.94		
Online Expenditure		5,239,535.39	3,227,714.39	3,498,241.05	11,965,490.83		
Total Expenditure		11,812,998.04	7,875,034.32	7,779,418.28	27,467,450.64	5,869,004.94	11,607,308.81

APPENDIX C3 POPULATION AND EXPENDITURE ANALYSIS

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2025 - 2037)

		2025	2030	2035	2037
Zone 1	Greenwich	316,532	325,901	334,298	337,554
Zone 2	Bexley / Bromley	162,408	165,138	167,817	168,865
Zone 3	Bromley/ Lewisham	213,657	218,461	223,458	225,553
Total Study Area :		692,597	709,500	725,573	731,972
Royal Borough of Greenwich:		299,793	308,883	316,999	320,159

Notes *Experian population projections*

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2025 to 2037)

		Including SFT	Excluding Special Forms of Trading (SFT)			
		2025	2025	2030	2035	2037
Experian-based Online Market Shares (%):		17.5%	5.4%	6.1%	6.8%	7.0%
Transaction-based Online Market Shares (%):		13.9%	4.2%	4.7%	5.3%	5.4%
Zone 1	Greenwich	£2,511	£2,376	£2,316	£2,274	£2,260
Zone 2	Bexley / Bromley	£2,727	£2,579	£2,515	£2,468	£2,453
Zone 3	Bromley/ Lewisham	£2,594	£2,454	£2,392	£2,349	£2,334
Total Study Area:		£2,611	£2,470	£2,408	£2,364	£2,349
Royal Borough of Greenwich:		£2,528	£2,391	£2,319	£2,275	£2,261

Source: Average spend per capita estimates (2021 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 published by Experian Business Strategies (March 2025).

Notes: At the Base Year (2025) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 22.
Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 22 (March 2025).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million) (2025 to 2037)

		Including SFT	Excluding Special Forms of Trading (SFT)			
		2025	2025	2030	2035	2037
Zone 1	Greenwich	£794,920,496	£751,994,789	£754,786,938	£760,046,397	£762,742,075
Zone 2	Bexley / Bromley	£442,826,372	£418,913,748	£415,246,221	£414,249,760	£414,280,102
Zone 3	Bromley/ Lewisham	£554,257,339	£524,327,443	£522,637,844	£524,795,965	£526,467,185
Total Study Area:		£1,792,004,207	£1,695,235,980	£1,692,671,003	£1,699,092,122	£1,703,489,362
Royal Borough of Greenwich:		£757,777,173	£716,857,205	£716,412,510	£721,039,915	£723,761,118

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2025 to 2037)

		Including SFT	Excluding Special Forms of Trading (SFT)			
		2025	2025	2030	2035	2037
Experian-based Online Market Shares (%):		32.1%	24.1%	26.2%	27.9%	28.6%
Transaction-based Online Market Shares (%):		38.1%	28.5%	31.0%	33.0%	33.9%
Zone 1	Greenwich	£3,690	£2,637	£2,846	£3,138	£3,262
Zone 2	Bexley / Bromley	£3,973	£2,839	£3,064	£3,378	£3,512
Zone 3	Bromley/ Lewisham	£3,854	£2,754	£2,972	£3,277	£3,407
Total Study Area:		£3,839	£2,743	£2,960	£3,264	£3,394
Royal Borough of Greenwich:		£3,561	£2,544	£2,682	£2,954	£3,071

Source: Average spend per capita estimates (2021 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 published by Experian Business Strategies (March 2025).

Notes: At the Base Year (2024) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 22.

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 22 (March 2025).

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million) (2025 to 2037)

		Including SFT	Excluding Special Forms of Trading (SFT) (£m)			
		2025	2025	2030	2035	2037
Zone 1	Greenwich	£1,168,144,494	£834,659,881	£927,455,338	£1,049,020,613	£1,101,224,239
Zone 2	Bexley / Bromley	£645,227,318	£461,026,320	£505,918,682	£566,907,994	£593,059,861
Zone 3	Bromley/ Lewisham	£823,425,555	£588,352,109	£649,246,325	£732,275,362	£768,438,971
Total Study Area:		£2,636,797,367	£1,884,038,310	£2,082,620,345	£2,348,203,969	£2,462,723,071
Royal Borough of Greenwich:		£1,067,597,985	£762,817,624	£828,359,474	£936,487,890	£983,314,057

APPENDIX C4 CONVENIENCE RETAIL CAPACITY ASSESSMENT TABLES

TABLE 1: REVISED TRANSACTION TURNOVER - INCLUDING MULTI-GOODS SUPERMARKET ALLOCATION

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	23,643.29	7,238.66	98.22	30,980.17	6,139.84	37,120.01
Zone 1	Blackheath (London)	28,478.53	1,430.28	3,183.35	33,092.16	7,758.09	40,850.25
Zone 1	Eltham	1,932,516.29	425,520.53	280,315.17	2,638,351.99	229,339.38	2,867,691.36
Zone 1	Greenwich East	282,248.96	4,824.92	6,238.92	293,312.80	48,384.46	341,697.26
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	4,072,450.95	356,428.32	360,809.76	4,789,689.04	1,070,741.76	5,860,430.80
Zone 1	Greenwich Village	286,823.80	7,760.65	53,394.42	347,978.87	177,223.71	525,202.58
Zone 1	Kidbrooke	1,174,498.55	97,016.75	183,236.43	1,454,751.72	125,250.14	1,580,001.86
Zone 1	Lee	649,947.79	12,909.41	645,711.91	1,308,569.11	94,326.82	1,402,895.93
Zone 1	North Greenwich	61,063.75	5,934.73	3,980.48	70,978.96	152,343.12	223,322.08
Zone 1	Plumstead	155,877.16	9,853.43	1,830.44	167,561.02	18,922.18	186,483.20
Zone 1	Thamesmead	302,841.62	90,827.70	2,920.87	396,590.18	77,874.99	474,465.17
Zone 1	Woolwich	2,146,687.74	107,190.17	48,024.46	2,301,902.37	400,257.78	2,702,160.15
Zone 1	All Other	5,783,829.07	894,989.86	428,733.09	7,107,552.01	1,101,320.67	8,208,872.68
Zone 1	Total	16,900,907.49	2,021,925.41	2,018,477.51	20,941,310.40	3,509,882.92	24,451,193.32
Zone 2	Bexley	2,057.27	68,950.46	310.75	71,318.48	22,606.06	93,924.54
Zone 2	Bexleyheath	264,662.05	2,154,926.58	18,137.11	2,437,725.74	1,260,417.02	3,698,142.76
Zone 2	Sidcup	314,522.29	2,348,854.44	163,522.75	2,826,899.48	577,850.40	3,404,749.88
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Welling	800,900.18	2,679,580.58	22,065.56	3,502,546.32	352,637.87	3,855,184.19
Zone 2	All Other	620,621.25	3,567,897.23	22,455.92	4,210,974.40	1,069,351.11	5,280,325.51
Zone 2	Total	2,002,763.03	10,820,209.28	226,492.10	13,049,464.41	3,282,862.46	16,332,326.88
Zone 3	Catford	11,577.82	2,140.65	299,208.93	312,927.40	196,991.85	509,919.25
Zone 3	Catford - Bromley Road Retail Park	5,896.25	1,869.62	96,024.21	103,790.08	173,149.84	276,939.92
Zone 3	Chislehurst	172,291.97	17,263.65	849,099.00	1,038,654.62	188,283.06	1,226,937.68
Zone 3	Deptford	30,420.89	1,758.14	274,336.21	306,515.24	83,847.48	390,362.71
Zone 3	Downham	0.00	0.00	29.76	29.76	444.54	474.30
Zone 3	Lewisham	694,522.77	46,549.24	2,090,895.25	2,831,967.25	811,288.47	3,643,255.73
Zone 3	All Other	341,528.08	42,356.79	2,632,296.88	3,016,181.75	1,170,289.86	4,186,471.61
Zone 3	Total	1,256,237.76	111,938.10	6,241,890.24	7,610,066.10	2,624,295.10	10,234,361.20
Out of Area	London West End	146,186.99	68,977.32	124,026.03	339,190.34		
Out of Area	London City	199,665.36	116,362.83	162,103.92	478,132.11		
Out of Area	London Bridge	77,658.41	42,037.98	107,997.98	227,694.37		
Out of Area	Canary Wharf	236,522.58	43,000.60	90,103.50	369,626.68		
Out of Area	Bluewater	1,476.01	1,468.87	518.38	3,463.26		
Out of Area	Catford	41,059.32	11,201.55	802,557.61	854,818.48		
Out of Area	Petts Wood	16,458.21	10,137.51	65,458.03	92,053.75		
Out of Area	Beckenham	9,355.32	3,650.76	52,475.90	65,481.98		
Out of Area	Brixton	17,425.24	4,324.34	18,538.40	40,287.98		
Out of Area	Downham	6,037.65	1,095.47	98,193.69	105,326.81		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	316,015.62	1,001,218.20	271,286.83	1,588,520.65		
Out of Area	All Other	3,999,528.19	5,257,557.12	5,907,522.40	15,164,607.70		
Out of Area	Total	5,067,388.91	6,561,032.54	7,700,782.67	19,329,204.11		
Online Expenditure		3,655,854.04	3,856,796.20	2,328,377.60	9,841,027.84		
Total Expenditure		28,883,151.23	23,371,901.52	18,516,020.11	70,771,072.86	9,417,040.48	51,017,881.39

TABLE 2: 2025 CONVENIENCE TURNOVER MARKET SHARES INCLUDING ONLINE (%)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	0.08%	0.03%	0.00%	0.04%	0.07%	0.07%
Zone 1	Blackheath (London)	0.10%	0.01%	0.02%	0.05%	0.08%	0.08%
Zone 1	Eltham	6.69%	1.82%	1.51%	3.73%	2.44%	5.62%
Zone 1	Greenwich East	0.98%	0.02%	0.03%	0.41%	0.51%	0.67%
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	14.10%	1.53%	1.95%	6.77%	11.37%	11.49%
Zone 1	Greenwich Village	0.99%	0.03%	0.29%	0.49%	1.88%	1.03%
Zone 1	Kidbrooke	4.07%	0.42%	0.99%	2.06%	1.33%	3.10%
Zone 1	Lee	2.25%	0.06%	3.49%	1.85%	1.00%	2.75%
Zone 1	North Greenwich	0.21%	0.03%	0.02%	0.10%	1.62%	0.44%
Zone 1	Plumstead	0.54%	0.04%	0.01%	0.24%	0.20%	0.37%
Zone 1	Thamesmead	1.05%	0.39%	0.02%	0.56%	0.83%	0.93%
Zone 1	Woolwich	7.43%	0.46%	0.26%	3.25%	4.25%	5.30%
Zone 1	All Other	20.02%	3.83%	2.32%	10.04%	11.69%	16.09%
Zone 1	Total	58.51%	8.65%	10.90%	29.59%	37.27%	47.93%
Zone 2	Bexley	0.01%	0.30%	0.00%	0.10%	0.24%	0.18%
Zone 2	Bexleyheath	0.92%	9.22%	0.10%	3.44%	13.38%	7.25%
Zone 2	Sidcup	1.09%	10.05%	0.88%	3.99%	6.14%	6.67%
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 2	Welling	2.77%	11.46%	0.12%	4.95%	3.74%	7.56%
Zone 2	All Other	2.15%	15.27%	0.12%	5.95%	11.36%	10.35%
Zone 2	Total	6.93%	46.30%	1.22%	18.44%	34.86%	32.01%
Zone 3	Catford	0.04%	0.01%	1.62%	0.44%	2.09%	1.00%
Zone 3	Catford - Bromley Road Retail Park	0.02%	0.01%	0.52%	0.15%	1.84%	0.54%
Zone 3	Chislehurst	0.60%	0.07%	4.59%	1.47%	2.00%	2.40%
Zone 3	Deptford	0.11%	0.01%	1.48%	0.43%	0.89%	0.77%
Zone 3	Downham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Lewisham	2.40%	0.20%	11.29%	4.00%	8.62%	7.14%
Zone 3	All Other	1.18%	0.18%	14.22%	4.26%	12.43%	8.21%
Zone 3	Total	4.35%	0.48%	33.71%	10.75%	27.87%	20.06%
Out of Area	London West End	0.51%	0.30%	0.67%	0.48%		
Out of Area	London City	0.69%	0.50%	0.88%	0.68%		
Out of Area	London Bridge	0.27%	0.18%	0.58%	0.32%		
Out of Area	Canary Wharf	0.82%	0.18%	0.49%	0.52%		
Out of Area	Bluewater	0.01%	0.01%	0.00%	0.00%		
Out of Area	Catford	0.14%	0.05%	4.33%	1.21%		
Out of Area	Petts Wood	0.06%	0.04%	0.35%	0.13%		
Out of Area	Beckenham	0.03%	0.02%	0.28%	0.09%		
Out of Area	Brixton	0.06%	0.02%	0.10%	0.06%		
Out of Area	Downham	0.02%	0.00%	0.53%	0.15%		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	1.09%	4.28%	1.47%	2.24%		
Out of Area	All Other	13.85%	22.50%	31.90%	21.43%		
Out of Area	Total	17.54%	28.07%	41.59%	27.31%		
Online Expenditure		12.66%	16.50%	12.57%	13.91%		
Total Expenditure		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

		28.83%	74.85%	76.52%	56.50%		

TABLE 3: 2025 CONVENIENCE TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	650,709	137,151	2,940	790,800	156,726	947,526
Zone 1	Blackheath (London)	783,785	27,099	95,290	906,174	212,442	1,118,617
Zone 1	Eltham	53,186,607	8,062,318	8,390,936	69,639,861	6,053,462	75,693,323
Zone 1	Greenwich East	7,768,040	91,418	186,755	8,046,213	1,327,292	9,373,505
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	112,081,771	6,753,231	10,800,456	129,635,458	28,980,190	158,615,648
Zone 1	Greenwich Village	7,893,949	147,041	1,598,305	9,639,295	4,909,239	14,548,534
Zone 1	Kidbrooke	32,324,484	1,838,172	5,484,987	39,647,644	3,413,553	43,061,197
Zone 1	Lee	17,887,827	244,594	19,328,698	37,461,119	2,700,345	40,161,465
Zone 1	North Greenwich	1,680,593	112,445	119,151	1,912,190	4,104,159	6,016,349
Zone 1	Plumstead	4,290,043	186,692	54,792	4,531,527	511,732	5,043,259
Zone 1	Thamesmead	8,334,790	1,720,908	87,433	10,143,132	1,991,719	12,134,851
Zone 1	Woolwich	59,081,022	2,030,927	1,437,561	62,549,510	10,876,190	73,425,700
Zone 1	All Other	159,182,225	16,957,333	12,833,668	188,973,226	29,281,547	218,254,773
Zone 1	Total	465,145,844	38,309,330	60,420,974	563,876,148	94,518,597	658,394,745
Zone 2	Bexley	56,620	1,306,401	9,302	1,372,323	434,990	1,807,313
Zone 2	Bexleyheath	7,284,014	40,829,297	542,915	48,656,227	25,157,521	73,813,748
Zone 2	Sidcup	8,656,265	44,503,640	4,894,879	58,054,784	11,867,058	69,921,842
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	22,042,331	50,769,893	660,509	73,472,733	7,397,266	80,869,999
Zone 2	All Other	17,080,704	67,600,789	672,194	85,353,687	21,675,045	107,028,732
Zone 2	Total	55,119,934	205,010,021	6,779,800	266,909,754	66,531,880	333,441,635
Zone 3	Catford	318,644	40,559	8,956,501	9,315,704	5,864,356	15,180,060
Zone 3	Catford - Bromley Road Retail Park	162,276	35,424	2,874,382	3,072,082	5,125,062	8,197,144
Zone 3	Chislehurst	4,741,810	327,094	25,416,874	30,485,778	5,526,337	36,012,115
Zone 3	Deptford	837,242	33,311	8,211,962	9,082,516	2,484,529	11,567,045
Zone 3	Downham	0	0	891	891	0	891
Zone 3	Lewisham	19,114,617	881,966	62,588,722	82,585,306	23,658,644	106,243,950
Zone 3	All Other	9,399,517	802,532	78,795,003	88,997,052	34,531,191	123,528,243
Zone 3	Total	34,574,106	2,120,886	186,844,335	223,539,328	77,190,119	300,729,447
Out of Area	London West End	4,023,350	1,306,910	3,712,587	9,042,848		
Out of Area	London City	5,495,179	2,204,721	4,852,408	12,552,309		
Out of Area	London Bridge	2,137,310	796,492	3,232,804	6,166,607		
Out of Area	Canary Wharf	6,509,561	814,730	2,697,152	10,021,444		
Out of Area	Bluewater	40,623	27,831	15,517	83,970		
Out of Area	Catford	1,130,032	212,235	24,023,707	25,365,975		
Out of Area	Petts Wood	452,962	192,075	1,959,416	2,604,453		
Out of Area	Beckenham	257,477	69,171	1,570,810	1,897,458		
Out of Area	Brixton	479,577	81,933	554,927	1,116,437		
Out of Area	Downham	166,168	20,756	2,939,324	3,126,247		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	8,697,365	18,970,036	8,120,682	35,788,083		
Out of Area	All Other	110,074,794	99,614,699	176,835,390	386,524,884		
Out of Area	Total	139,464,398	124,311,590	230,514,726	494,290,714		
Online Expenditure		100,616,213	73,074,545	69,697,503	243,388,262		
Total Expenditure		794,920,496	442,826,372	554,257,339	1,792,004,207	238,240,597	1,292,565,828
xpenditure Excluding Online		694,304,283	369,751,827	484,559,836	1,548,615,945	238,240,597	1,292,565,828

TABLE 4: 2025 CONVENIENCE TURNOVER MARKET SHARES EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	0.09%	0.04%	0.00%	0.05%	0.07%	0.07%
Zone 1	Blackheath (London)	0.11%	0.01%	0.02%	0.06%	0.09%	0.09%
Zone 1	Eltham	7.66%	2.18%	1.73%	4.50%	2.54%	5.86%
Zone 1	Greenwich East	1.12%	0.02%	0.04%	0.52%	0.56%	0.73%
Zone 1	Greenwich Peninsula - Greenwich Shopping Park	16.14%	1.83%	2.23%	8.37%	12.16%	12.27%
Zone 1	Greenwich Village	1.14%	0.04%	0.33%	0.62%	2.06%	1.13%
Zone 1	Kidbrooke	4.66%	0.50%	1.13%	2.56%	1.43%	3.33%
Zone 1	Lee	2.58%	0.07%	3.99%	2.42%	1.13%	3.11%
Zone 1	North Greenwich	0.24%	0.03%	0.02%	0.12%	1.72%	0.47%
Zone 1	Plumstead	0.62%	0.05%	0.01%	0.29%	0.21%	0.39%
Zone 1	Thamesmead	1.20%	0.47%	0.02%	0.65%	0.84%	0.94%
Zone 1	Woolwich	8.51%	0.55%	0.30%	4.04%	4.57%	5.68%
Zone 1	All Other	22.93%	4.59%	2.65%	12.20%	12.29%	16.89%
Zone 1	Total	66.99%	10.36%	12.47%	36.41%	39.67%	50.94%
Zone 2	Bexley	0.01%	0.35%	0.00%	0.09%	0.18%	0.14%
Zone 2	Bexleyheath	1.05%	11.04%	0.11%	3.14%	10.56%	5.71%
Zone 2	Sidcup	1.25%	12.04%	1.01%	3.75%	4.98%	5.41%
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 2	Welling	3.17%	13.73%	0.14%	4.74%	3.10%	6.26%
Zone 2	All Other	2.46%	18.28%	0.14%	5.51%	9.10%	8.28%
Zone 2	Total	7.94%	55.45%	1.40%	17.24%	27.93%	25.80%
Zone 3	Catford	0.05%	0.01%	1.85%	0.60%	2.46%	1.17%
Zone 3	Catford - Bromley Road Retail Park	0.02%	0.01%	0.59%	0.20%	2.15%	0.63%
Zone 3	Chislehurst	0.68%	0.09%	5.25%	1.97%	2.32%	2.79%
Zone 3	Deptford	0.12%	0.01%	1.69%	0.59%	1.04%	0.89%
Zone 3	Downham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Lewisham	2.75%	0.24%	12.92%	5.33%	9.93%	8.22%
Zone 3	All Other	1.35%	0.22%	16.26%	5.75%	14.49%	9.56%
Zone 3	Total	4.98%	0.57%	38.56%	14.43%	32.40%	23.27%
Out of Area	London West End	0.58%	0.35%	0.77%	0.58%		
Out of Area	London City	0.79%	0.60%	1.00%	0.81%		
Out of Area	London Bridge	0.31%	0.22%	0.67%	0.40%		
Out of Area	Canary Wharf	0.94%	0.22%	0.56%	0.65%		
Out of Area	Bluewater	0.01%	0.01%	0.00%	0.01%		
Out of Area	Catford	0.16%	0.06%	4.96%	1.64%		
Out of Area	Petts Wood	0.07%	0.05%	0.40%	0.17%		
Out of Area	Beckenham	0.04%	0.02%	0.32%	0.12%		
Out of Area	Brixton	0.07%	0.02%	0.11%	0.07%		
Out of Area	Downham	0.02%	0.01%	0.61%	0.20%		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	1.25%	5.13%	1.68%	2.31%		
Out of Area	All Other	15.85%	26.94%	36.49%	24.96%		
Out of Area	Total	20.09%	33.62%	47.57%	31.92%		
Total Expenditure		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

TABLE 5: 2025 CONVENIENCE TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	704,777	155,386	3,181	863,345	171,103	1,034,448
Zone 1	Blackheath (London)	848,910	30,703	103,111	982,723	230,389	1,213,112
Zone 1	Eltham	57,605,940	9,134,278	9,079,576	75,819,795	6,590,654	82,410,449
Zone 1	Greenwich East	8,413,495	103,572	202,082	8,719,150	1,438,299	10,157,449
Zone 1	Greenwich Peninsula/Charlton Riverside	121,394,768	7,651,136	11,686,844	140,732,749	31,461,005	172,193,754
Zone 1	Greenwich Village	8,549,866	166,591	1,729,477	10,445,934	5,320,056	15,765,990
Zone 1	Kidbrooke	35,010,361	2,082,574	5,935,138	43,028,073	3,704,599	46,732,672
Zone 1	Lee	19,374,146	277,115	20,914,996	40,566,257	2,924,176	43,490,433
Zone 1	North Greenwich	1,820,235	127,396	128,930	2,076,561	4,456,952	6,533,513
Zone 1	Plumstead	4,646,507	211,515	59,289	4,917,311	555,298	5,472,608
Zone 1	Thamesmead	9,027,337	1,949,719	94,609	11,071,665	2,174,047	13,245,712
Zone 1	Woolwich	63,990,129	2,300,958	1,555,541	67,846,628	11,797,260	79,643,887
Zone 1	All Other	172,408,851	19,211,967	13,886,922	205,507,739	31,843,583	237,351,322
Zone 1	Total	503,795,324	43,402,909	65,379,696	612,577,930	102,667,419	715,245,349
Zone 2	Bexley	61,325	1,480,099	10,065	1,551,489	491,781	2,043,270
Zone 2	Bexleyheath	7,889,251	46,257,930	587,472	54,734,653	28,300,349	83,035,001
Zone 2	Sidcup	9,375,524	50,420,810	5,296,600	65,092,934	13,305,736	78,398,669
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	23,873,852	57,520,219	714,717	82,108,788	8,266,748	90,375,537
Zone 2	All Other	18,499,958	76,588,938	727,361	95,816,257	24,331,951	120,148,208
Zone 2	Total	59,699,910	232,267,997	7,336,215	299,304,121	74,696,564	374,000,685
Zone 3	Catford	345,121	45,951	9,691,557	10,082,629	6,347,145	16,429,774
Zone 3	Catford - Bromley Road Retail Park	175,760	40,134	3,110,282	3,326,175	5,548,957	8,875,132
Zone 3	Chislehurst	5,135,812	370,584	27,502,825	33,009,221	5,983,777	38,992,998
Zone 3	Deptford	906,809	37,740	8,885,914	9,830,464	2,689,131	12,519,595
Zone 3	Downham	0	0	964	964	0	964
Zone 3	Lewisham	20,702,872	999,232	67,725,350	89,427,454	25,618,751	115,046,205
Zone 3	All Other	10,180,533	909,236	85,261,674	96,351,443	37,384,722	133,736,165
Zone 3	Total	37,446,907	2,402,877	202,178,566	242,028,350	83,572,483	325,600,833
Out of Area	London West End	4,357,655	1,480,676	4,017,277	9,855,608		
Out of Area	London City	5,951,780	2,497,859	5,250,643	13,700,282		
Out of Area	London Bridge	2,314,902	902,393	3,498,119	6,715,414		
Out of Area	Canary Wharf	7,050,448	923,056	2,918,506	10,892,011		
Out of Area	Bluewater	43,998	31,531	16,791	92,320		
Out of Area	Catford	1,223,928	240,454	25,995,322	27,459,704		
Out of Area	Petts Wood	490,599	217,613	2,120,225	2,828,437		
Out of Area	Beckenham	278,871	78,368	1,699,726	2,056,964		
Out of Area	Brixton	519,425	92,827	600,470	1,212,722		
Out of Area	Downham	179,975	23,515	3,180,552	3,384,043		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	9,420,038	21,492,278	8,787,143	39,699,459		
Out of Area	All Other	119,221,030	112,859,394	191,348,191	423,428,615		
Out of Area	Total	151,052,648	140,839,964	249,432,966	541,325,578		
Total Expenditure		751,994,789	418,913,748	524,327,443	1,695,235,980	260,936,466	1,414,846,867

TABLE 6: 2030 CONVENIENCE TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	707,394	154,026	3,171	864,591	171,350	1,035,941
Zone 1	Blackheath (London)	852,062	30,434	102,778	985,274	230,987	1,216,261
Zone 1	Eltham	57,819,831	9,054,309	9,050,318	75,924,458	6,599,752	82,524,209
Zone 1	Greenwich East	8,444,735	102,666	201,431	8,748,831	1,443,195	10,192,026
Zone 1	Greenwich Peninsula/Charlton Riverside	121,845,506	7,584,151	11,649,185	141,078,842	31,538,375	172,617,216
Zone 1	Greenwich Village	8,581,611	165,133	1,723,904	10,470,648	5,332,643	15,803,291
Zone 1	Kidbrooke	35,140,354	2,064,341	5,916,012	43,120,708	3,712,575	46,833,283
Zone 1	Lee	19,446,082	274,689	20,847,599	40,568,370	2,924,328	43,492,699
Zone 1	North Greenwich	1,826,994	126,280	128,515	2,081,789	4,468,172	6,549,961
Zone 1	Plumstead	4,663,759	209,663	59,098	4,932,520	557,015	5,489,536
Zone 1	Thamesmead	9,060,856	1,932,649	94,304	11,087,809	2,177,217	13,265,026
Zone 1	Woolwich	64,227,723	2,280,813	1,550,528	68,059,065	11,834,199	79,893,264
Zone 1	All Other	173,049,003	19,043,769	13,842,172	205,934,944	31,909,778	237,844,723
Zone 1	Total	505,665,911	43,022,924	65,169,016	613,857,850	102,899,585	716,757,436
Zone 2	Bexley	61,552	1,467,141	10,033	1,538,727	487,735	2,026,462
Zone 2	Bexleyheath	7,918,544	45,852,948	585,579	54,357,071	28,105,121	82,462,192
Zone 2	Sidcup	9,410,335	49,979,383	5,279,532	64,669,250	13,219,130	77,888,380
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	23,962,495	57,016,639	712,414	81,691,548	8,224,740	89,916,288
Zone 2	All Other	18,568,648	75,918,414	725,017	95,212,079	24,178,523	119,390,602
Zone 2	Total	59,921,575	230,234,526	7,312,575	297,468,675	74,215,250	371,683,925
Zone 3	Catford	346,402	45,549	9,660,326	10,052,278	6,328,039	16,380,316
Zone 3	Catford - Bromley Road Retail Park	176,412	39,782	3,100,259	3,316,454	5,532,739	8,849,193
Zone 3	Chislehurst	5,154,881	367,339	27,414,200	32,936,421	5,970,580	38,907,000
Zone 3	Deptford	910,176	37,410	8,857,280	9,804,867	2,682,129	12,486,995
Zone 3	Downham	0	0	961	961	0	961
Zone 3	Lewisham	20,779,741	990,484	67,507,111	89,277,336	25,575,746	114,853,082
Zone 3	All Other	10,218,333	901,276	84,986,925	96,106,535	37,289,697	133,396,232
Zone 3	Total	37,585,947	2,381,841	201,527,063	241,494,851	83,378,929	324,873,780
Out of Area	London West End	4,373,835	1,467,713	4,004,332	9,845,880		
Out of Area	London City	5,973,878	2,475,991	5,233,723	13,683,593		
Out of Area	London Bridge	2,323,497	894,492	3,486,847	6,704,836		
Out of Area	Canary Wharf	7,076,626	914,975	2,909,102	10,900,703		
Out of Area	Bluewater	44,161	31,255	16,737	92,153		
Out of Area	Catford	1,228,472	238,349	25,911,554	27,378,376		
Out of Area	Petts Wood	492,421	215,708	2,113,393	2,821,521		
Out of Area	Beckenham	279,906	77,682	1,694,249	2,051,836		
Out of Area	Brixton	521,354	92,014	598,535	1,211,903		
Out of Area	Downham	180,643	23,310	3,170,303	3,374,256		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	9,455,015	21,304,116	8,758,827	39,517,958		
Out of Area	All Other	119,663,696	111,871,327	190,731,588	422,266,612		
Out of Area	Total	151,613,505	139,606,931	248,629,190	539,849,627		
Total Expenditure		754,786,938	415,246,221	522,637,844	1,692,671,003	260,493,765	1,413,315,141

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TABLE 7: 2035 CONVENIENCE TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	712,324	153,656	3,184	869,164	172,256	1,041,420
Zone 1	Blackheath (London)	857,999	30,361	103,203	991,563	232,461	1,224,024
Zone 1	Eltham	58,222,727	9,032,581	9,087,689	76,342,998	6,636,133	82,979,131
Zone 1	Greenwich East	8,503,579	102,419	202,263	8,808,261	1,452,998	10,261,259
Zone 1	Greenwich Peninsula/Charlton Riverside	122,694,542	7,565,952	11,697,287	141,957,781	31,734,863	173,692,644
Zone 1	Greenwich Village	8,641,409	164,736	1,731,023	10,537,168	5,366,521	15,903,689
Zone 1	Kidbrooke	35,385,217	2,059,387	5,940,441	43,385,046	3,735,334	47,120,379
Zone 1	Lee	19,581,585	274,030	20,933,685	40,789,300	2,940,254	43,729,554
Zone 1	North Greenwich	1,839,725	125,977	129,045	2,094,747	4,495,985	6,590,733
Zone 1	Plumstead	4,696,257	209,160	59,342	4,964,759	560,656	5,525,415
Zone 1	Thamesmead	9,123,993	1,928,012	94,693	11,146,698	2,188,781	13,335,478
Zone 1	Woolwich	64,675,271	2,275,340	1,556,931	68,507,542	11,912,180	80,419,723
Zone 1	All Other	174,254,832	18,998,070	13,899,330	207,152,233	32,098,398	239,250,631
Zone 1	Total	509,189,461	42,919,682	65,438,117	617,547,260	103,526,820	721,074,080
Zone 2	Bexley	61,981	1,463,621	10,074	1,535,676	486,769	2,022,445
Zone 2	Bexleyheath	7,973,721	45,742,916	587,997	54,304,634	28,078,009	82,382,643
Zone 2	Sidcup	9,475,908	49,859,448	5,301,333	64,636,689	13,212,474	77,849,163
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	24,129,469	56,879,816	715,355	81,724,641	8,228,072	89,952,713
Zone 2	All Other	18,698,037	75,736,233	728,011	95,162,281	24,165,877	119,328,159
Zone 2	Total	60,339,117	229,682,034	7,342,770	297,363,921	74,171,201	371,535,122
Zone 3	Catford	348,816	45,440	9,700,217	10,094,472	6,354,601	16,449,073
Zone 3	Catford - Bromley Road Retail Park	177,642	39,687	3,113,061	3,330,389	5,555,988	8,886,377
Zone 3	Chislehurst	5,190,801	366,458	27,527,401	33,084,660	5,997,452	39,082,112
Zone 3	Deptford	916,519	37,320	8,893,854	9,847,693	2,693,844	12,541,537
Zone 3	Downham	0	0	965	965	0	965
Zone 3	Lewisham	20,924,537	988,107	67,785,867	89,698,512	25,696,402	115,394,914
Zone 3	All Other	10,289,536	899,113	85,337,861	96,526,510	37,452,649	133,979,159
Zone 3	Total	37,847,851	2,376,125	202,359,226	242,583,202	83,750,935	326,334,137
Out of Area	London West End	4,404,312	1,464,191	4,020,867	9,889,370		
Out of Area	London City	6,015,505	2,470,049	5,255,335	13,740,890		
Out of Area	London Bridge	2,339,688	892,346	3,501,245	6,733,279		
Out of Area	Canary Wharf	7,125,937	912,780	2,921,114	10,959,831		
Out of Area	Bluewater	44,469	31,180	16,806	92,455		
Out of Area	Catford	1,237,033	237,777	26,018,551	27,493,360		
Out of Area	Petts Wood	495,852	215,190	2,122,119	2,833,162		
Out of Area	Beckenham	281,856	77,495	1,701,245	2,060,596		
Out of Area	Brixton	524,987	91,793	601,006	1,217,786		
Out of Area	Downham	181,902	23,254	3,183,395	3,388,550		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	9,520,898	21,252,993	8,794,995	39,568,886		
Out of Area	All Other	120,497,530	111,602,871	191,519,174	423,619,574		
Out of Area	Total	152,669,969	139,271,918	249,655,851	541,597,739		
Total Expenditure		760,046,397	414,249,760	524,795,965	1,699,092,122	261,448,957	1,418,943,340

TABLE 8: 2037 CONVENIENCE TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	714,850	153,667	3,194	871,712	172,761	1,044,473
Zone 1	Blackheath (London)	861,042	30,363	103,531	994,937	233,252	1,228,189
Zone 1	Eltham	58,429,227	9,033,243	9,116,629	76,579,100	6,656,657	83,235,756
Zone 1	Greenwich East	8,533,739	102,427	202,907	8,839,072	1,458,081	10,297,153
Zone 1	Greenwich Peninsula/Charlton Riverside	123,129,706	7,566,506	11,734,538	142,430,750	31,840,596	174,271,345
Zone 1	Greenwich Village	8,672,058	164,748	1,736,535	10,573,341	5,384,944	15,958,286
Zone 1	Kidbrooke	35,510,719	2,059,538	5,959,359	43,529,616	3,747,781	47,277,397
Zone 1	Lee	19,651,036	274,050	21,000,348	40,925,434	2,950,067	43,875,501
Zone 1	North Greenwich	1,846,250	125,987	129,456	2,101,693	4,510,892	6,612,584
Zone 1	Plumstead	4,712,913	209,175	59,531	4,981,620	562,560	5,544,179
Zone 1	Thamesmead	9,156,353	1,928,153	94,995	11,179,501	2,195,222	13,374,723
Zone 1	Woolwich	64,904,657	2,275,507	1,561,889	68,742,052	11,952,957	80,695,010
Zone 1	All Other	174,872,867	18,999,461	13,943,593	207,815,921	32,201,237	240,017,159
Zone 1	Total	510,995,417	42,922,826	65,646,506	619,564,749	103,867,006	723,431,754
Zone 2	Bexley	62,201	1,463,728	10,106	1,536,035	486,882	2,022,918
Zone 2	Bexleyheath	8,002,002	45,746,266	589,869	54,338,137	28,095,332	82,433,469
Zone 2	Sidcup	9,509,516	49,863,100	5,318,215	64,690,831	13,223,541	77,914,373
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	24,215,050	56,883,983	717,634	81,816,666	8,237,337	90,054,004
Zone 2	All Other	18,764,354	75,741,781	730,329	95,236,464	24,184,716	119,421,180
Zone 2	Total	60,553,123	229,698,858	7,366,153	297,618,135	74,227,809	371,845,943
Zone 3	Catford	350,053	45,443	9,731,107	10,126,603	6,374,828	16,501,431
Zone 3	Catford - Bromley Road Retail Park	178,272	39,690	3,122,974	3,340,936	5,573,582	8,914,518
Zone 3	Chislehurst	5,209,212	366,485	27,615,063	33,190,759	6,016,685	39,207,444
Zone 3	Deptford	919,769	37,323	8,922,177	9,879,269	2,702,482	12,581,751
Zone 3	Downham	0	0	968	968	0	968
Zone 3	Lewisham	20,998,751	988,179	68,001,732	89,988,663	25,779,523	115,768,186
Zone 3	All Other	10,326,030	899,179	85,609,620	96,834,830	37,572,278	134,407,108
Zone 3	Total	37,982,087	2,376,299	203,003,642	243,362,028	84,019,378	327,381,406
Out of Area	London West End	4,419,933	1,464,298	4,033,672	9,917,903		
Out of Area	London City	6,036,841	2,470,230	5,272,071	13,779,142		
Out of Area	London Bridge	2,347,986	892,411	3,512,395	6,752,792		
Out of Area	Canary Wharf	7,151,211	912,846	2,930,417	10,994,474		
Out of Area	Bluewater	44,627	31,182	16,859	92,668		
Out of Area	Catford	1,241,420	237,794	26,101,407	27,580,621		
Out of Area	Petts Wood	497,611	215,206	2,128,877	2,841,694		
Out of Area	Beckenham	282,856	77,501	1,706,662	2,067,019		
Out of Area	Brixton	526,849	91,800	602,920	1,221,569		
Out of Area	Downham	182,547	23,255	3,193,532	3,399,335		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	9,554,666	21,254,550	8,823,003	39,632,219		
Out of Area	All Other	120,924,901	111,611,045	192,129,069	424,665,016		
Out of Area	Total	153,211,448	139,282,120	250,450,884	542,944,451		
Total Expenditure		762,742,075	414,280,102	526,467,185	1,703,489,362	262,114,192	1,422,659,103

TABLE 9: SUMMARY OF RETAINED CONVENIENCE TURNOVER FOR GREENWICH BOROUGH INCLUDING TURNOVER INFLOW FROM OUTSIDE THE STUDY AREA (£M)

Merchant location	Retail Location	2025	2030	2035	2037
Zone 1	Abbey Wood	1,034,448	1,035,941	1,041,420	1,044,473
Zone 1	Blackheath (London)	1,213,112	1,216,261	1,224,024	1,228,189
Zone 1	Eltham	82,410,449	82,524,209	82,979,131	83,235,756
Zone 1	Greenwich East	10,157,449	10,192,026	10,261,259	10,297,153
Zone 1	Greenwich Peninsula/Charlton Riverside	172,193,754	172,617,216	173,692,644	174,271,345
Zone 1	Greenwich Village	15,765,990	15,803,291	15,903,689	15,958,286
Zone 1	Kidbrooke	46,732,672	46,833,283	47,120,379	47,277,397
Zone 1	Lee	43,490,433	43,492,699	43,729,554	43,875,501
Zone 1	North Greenwich	6,533,513	6,549,961	6,590,733	6,612,584
Zone 1	Plumstead	5,472,608	5,489,536	5,525,415	5,544,179
Zone 1	Thamesmead	13,245,712	13,265,026	13,335,478	13,374,723
Zone 1	Woolwich	79,643,887	79,893,264	80,419,723	80,695,010
Zone 1	All Other	237,351,322	237,844,723	239,250,631	240,017,159
Zone 1	Total	715,245,349	716,757,436	721,074,080	723,431,754

Source: Tables 4 to 7

TABLE 10: GREENWICH BOROUGH - FORECAST CAPACITY FOR CONVENIENCE FLOORSPACE (2025 TO 2037) EXCLUDING COMMITMENTS

			2025	2030	2035	2037
Step 1:		Total Forecast 'Current' Turnover of All Floorspace (£m):	£715.2	£716.8	£721.1	£723.4
Step 2:		Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£715.2	£718.8	£722.4	£723.9
Step 3:		**Net Residual Expenditure - Excluding Commitments (£m):**	-	-£2.1	-£1.4	-£0.4
Step 4:		**Capacity for Convenience Floorspace:**				
	(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,663
	(ii)	**Net Floorspace Capacity (sq m):**	**-**	**-165**	**-107**	**-35**
	(iii)	Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv)	Gross Floorspace Capacity (sq m):		-235	-153	-50

Notes:

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

Step 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.

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

Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer), supermarket (e.g. Co-op, Budgens, etc) and limited assortment discount (LAD) operators (e.g. Aldi and Lidl). Average sales densities are sourced from GlobalData 2024 dataset.

APPENDIX C5 COMPARISON RETAIL CAPACITY ASSESSMENT TABLES

TABLE 1: REVISED TRANSACTION TURNOVER - INCLUDING MULTI-GOODS COMPARISON ALLOCATION

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	43,291.89	21,919.29	839.58	66,050.76	19,236.02	85,286.78
Zone 1	Blackheath (London)	178,879.73	5,451.64	63,461.89	247,793.26	114,553.59	362,346.85
Zone 1	Eltham	1,945,904.33	527,914.61	295,894.73	2,769,713.68	236,133.30	3,005,846.98
Zone 1	Greenwich East	108,404.14	153.22	383.17	108,940.53	3,731.96	112,672.49
Zone 1	Greenwich Peninsula/Charlton Riverside	3,788,960.17	661,874.20	583,752.34	5,034,586.70	4,943,452.78	9,978,039.48
Zone 1	Greenwich Village	206,689.95	9,394.28	65,197.87	281,282.10	110,064.66	391,346.76
Zone 1	Kidbrooke	92,921.18	9,107.83	14,080.27	116,109.28	11,311.98	127,421.26
Zone 1	Lee	310,999.01	6,086.43	304,286.57	621,372.01	46,798.29	668,170.30
Zone 1	North Greenwich	173,160.07	36,511.40	41,489.34	251,160.81	350,327.15	601,487.96
Zone 1	Plumstead	49,218.22	5,513.21	610.90	55,342.34	18,934.97	74,277.31
Zone 1	Thamesmead	145,105.57	43,445.61	1,204.34	189,755.52	32,387.51	222,143.03
Zone 1	Woolwich	1,102,644.45	75,683.07	33,689.52	1,212,017.04	240,558.97	1,452,576.01
Zone 1	All Other	1,376,734.71	424,800.50	223,557.03	2,025,092.24	411,082.39	2,436,174.63
Zone 1	Total	9,522,913.43	1,827,855.28	1,628,447.56	12,979,216.26	6,538,573.59	19,517,789.85
Zone 2	Bexley	1,756.61	31,696.54	660.28	34,113.43	37,196.53	71,309.96
Zone 2	Bexleyheath	599,814.79	2,876,516.77	36,964.74	3,513,296.30	1,679,618.23	5,192,914.53
Zone 2	Sidcup	13,866.18	160,916.00	6,322.50	181,104.67	48,718.14	229,822.81
Zone 2	Sidcup - Crittalls Corner Retail Park	38,531.32	217,502.98	71,559.10	327,593.40	459,654.55	787,247.95
Zone 2	Welling	143,066.57	582,100.68	4,336.85	729,504.09	89,246.59	818,750.68
Zone 2	All Other	283,291.56	661,832.49	17,565.56	962,689.60	394,731.35	1,357,420.95
Zone 2	Total	1,080,327.03	4,530,565.45	137,409.02	5,748,301.50	2,709,165.39	8,457,466.89
Zone 3	Catford	3,351.01	1,513.36	49,275.00	54,139.37	41,496.05	95,635.42
Zone 3	Catford - Bromley Road Retail Park	13,609.80	1,300.48	91,612.73	106,523.01	185,782.01	292,305.02
Zone 3	Chislehurst	76,257.42	7,918.15	391,354.73	475,530.30	88,151.77	563,682.07
Zone 3	Deptford	112.16	6.50	214.53	333.19	191.52	524.72
Zone 3	Downham	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3	Lewisham	334,350.25	32,056.78	1,028,603.46	1,395,010.49	880,706.61	2,275,717.09
Zone 3	All Other	79,053.69	40,405.87	411,819.72	531,279.28	331,435.74	862,715.02
Zone 3	Total	506,734.34	83,201.14	1,972,880.17	2,562,815.65	1,527,763.70	4,090,579.34
Out of Area	London West End	1,019,867.23	358,535.52	859,249.19	2,237,651.94		
Out of Area	London City	370,558.97	155,348.04	294,020.31	819,927.32		
Out of Area	London Bridge	79,356.25	33,355.61	90,698.01	203,409.87		
Out of Area	Canary Wharf	266,484.32	52,633.07	120,899.46	440,016.85		
Out of Area	Bluewater	1,481,200.17	2,281,068.04	515,730.53	4,277,998.74		
Out of Area	Catford	5,672.48	2,526.76	119,915.10	128,114.34		
Out of Area	Petts Wood	559.61	581.03	4,469.10	5,609.74		
Out of Area	Beckenham	1,445.57	778.47	8,672.56	10,896.60		
Out of Area	Brixton	5,913.45	1,746.35	11,041.15	18,700.95		
Out of Area	Downham	1,412.75	366.83	43,122.32	44,901.90		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	184,882.91	503,240.92	123,507.36	811,631.18		
Out of Area	All Other	4,487,946.05	3,807,198.55	5,203,842.12	13,498,986.72		
Out of Area	Total	7,905,299.75	7,197,379.19	7,395,167.20	22,497,846.15		
Online Expenditure		11,328,719.98	7,850,917.11	7,731,613.79	26,911,250.88		
Total Expenditure		30,343,994.53	21,489,918.16	18,865,517.74	70,699,430.43	10,775,502.68	32,065,836.08

TABLE 2: COMPARISON TURNOVER MARKET SHARES INCLUDING ONLINE (%)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	0.14%	0.10%	0.00%	0.09%	0.18%	0.27%
Zone 1	Blackheath (London)	0.59%	0.03%	0.34%	0.35%	1.06%	1.13%
Zone 1	Eltham	6.41%	2.46%	1.57%	3.92%	2.19%	9.37%
Zone 1	Greenwich East	0.36%	0.00%	0.00%	0.15%	0.03%	0.35%
Zone 1	Greenwich Peninsula/Charlton Riverside	12.49%	3.08%	3.09%	7.12%	45.88%	31.12%
Zone 1	Greenwich Village	0.68%	0.04%	0.35%	0.40%	1.02%	1.22%
Zone 1	Kidbrooke	0.31%	0.04%	0.07%	0.16%	0.10%	0.40%
Zone 1	Lee	1.02%	0.03%	1.61%	0.88%	0.43%	2.08%
Zone 1	North Greenwich	0.57%	0.17%	0.22%	0.36%	3.25%	1.88%
Zone 1	Plumstead	0.16%	0.03%	0.00%	0.08%	0.18%	0.23%
Zone 1	Thamesmead	0.48%	0.20%	0.01%	0.27%	0.30%	0.69%
Zone 1	Woolwich	3.63%	0.35%	0.18%	1.71%	2.23%	4.53%
Zone 1	All Other	4.54%	1.98%	1.19%	2.86%	3.81%	7.60%
Zone 1	Total	31.38%	8.51%	8.63%	18.36%	60.68%	60.87%
Zone 2	Bexley	0.01%	0.15%	0.00%	0.05%	0.35%	0.22%
Zone 2	Bexleyheath	1.98%	13.39%	0.20%	4.97%	15.59%	16.19%
Zone 2	Sidcup	0.05%	0.75%	0.03%	0.26%	0.45%	0.72%
Zone 2	Sidcup - Crittalls Corner Retail Park	0.13%	1.01%	0.38%	0.46%	4.27%	2.46%
Zone 2	Welling	0.47%	2.71%	0.02%	1.03%	0.83%	2.55%
Zone 2	All Other	0.93%	3.08%	0.09%	1.36%	3.66%	4.23%
Zone 2	Total	3.56%	21.08%	0.73%	8.13%	25.14%	26.38%
Zone 3	Catford	0.01%	0.01%	0.26%	0.08%	0.39%	0.30%
Zone 3	Catford - Bromley Road Retail Park	0.04%	0.01%	0.49%	0.15%	1.72%	0.91%
Zone 3	Chislehurst	0.25%	0.04%	2.07%	0.67%	0.82%	1.76%
Zone 3	Deptford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Downham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Lewisham	1.10%	0.15%	5.45%	1.97%	8.17%	7.10%
Zone 3	All Other	0.26%	0.19%	2.18%	0.75%	3.08%	2.69%
Zone 3	Total	1.67%	0.39%	10.46%	3.62%	14.18%	12.76%
Out of Area	London West End	3.36%	1.67%	4.55%	3.17%		
Out of Area	London City	1.22%	0.72%	1.56%	1.16%		
Out of Area	London Bridge	0.26%	0.16%	0.48%	0.29%		
Out of Area	Canary Wharf	0.88%	0.24%	0.64%	0.62%		
Out of Area	Bluewater	4.88%	10.61%	2.73%	6.05%		
Out of Area	Catford	0.02%	0.01%	0.64%	0.18%		
Out of Area	Petts Wood	0.00%	0.00%	0.02%	0.01%		
Out of Area	Beckenham	0.00%	0.00%	0.05%	0.02%		
Out of Area	Brixton	0.02%	0.01%	0.06%	0.03%		
Out of Area	Downham	0.00%	0.00%	0.23%	0.06%		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	0.61%	2.34%	0.65%	1.15%		
Out of Area	All Other	14.79%	17.72%	27.58%	19.09%		
Out of Area	Total	26.05%	33.49%	39.20%	31.82%		
Online Expenditure		37.33%	36.53%	40.98%	38.06%		
Total Expenditure		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Lambert Smith Hampton

31.28% 54.96% 50.39% 43.58%

TABLE 3: COMPARISON TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	1,666,596	658,119	36,645	2,361,360	3,049,061	3,049,061
Zone 1	Blackheath (London)	6,886,284	163,684	2,769,929	9,819,897	14,359,586	14,359,586
Zone 1	Eltham	74,910,949	15,850,453	12,914,954	103,676,355	112,515,334	112,515,334
Zone 1	Greenwich East	4,173,205	4,600	16,724	4,194,529	4,338,221	4,338,221
Zone 1	Greenwich Peninsula/Charlton Riverside	145,862,568	19,872,543	25,479,110	191,214,220	378,967,162	378,967,162
Zone 1	Greenwich Village	7,956,887	282,060	2,845,699	11,084,646	15,422,028	15,422,028
Zone 1	Kidbrooke	3,577,161	273,459	614,563	4,465,184	4,900,206	4,900,206
Zone 1	Lee	11,972,444	182,743	13,281,233	25,436,420	27,352,150	27,352,150
Zone 1	North Greenwich	6,666,096	1,096,242	1,810,890	9,573,228	22,926,274	22,926,274
Zone 1	Plumstead	1,894,741	165,532	26,664	2,086,937	2,800,967	2,800,967
Zone 1	Thamesmead	5,586,090	1,304,439	52,566	6,943,095	8,128,144	8,128,144
Zone 1	Woolwich	42,448,203	2,272,358	1,470,451	46,191,012	55,358,921	55,358,921
Zone 1	All Other	52,999,781	12,754,487	9,757,621	75,511,889	90,840,380	90,840,380
Zone 1	Total	366,601,005	54,880,719	71,077,049	492,558,773	740,958,435	740,958,435
Zone 2	Bexley	67,624	951,678	28,819	1,048,121	2,190,968	2,190,968
Zone 2	Bexleyheath	23,090,907	86,366,416	1,613,404	111,070,727	164,170,836	164,170,836
Zone 2	Sidcup	533,802	4,831,447	275,959	5,641,208	7,158,724	7,158,724
Zone 2	Sidcup - Crittalls Corner Retail Park	1,483,330	6,530,451	3,123,349	11,137,130	26,763,917	26,763,917
Zone 2	Welling	5,507,595	17,477,370	189,291	23,174,256	26,009,365	26,009,365
Zone 2	All Other	10,905,798	19,871,290	766,686	31,543,774	44,477,659	44,477,659
Zone 2	Total	41,589,055	136,028,652	5,997,508	183,615,215	270,771,469	270,771,469
Zone 3	Catford	129,003	45,438	2,150,712	2,325,153	4,107,306	4,107,306
Zone 3	Catford - Bromley Road Retail Park	523,933	39,046	3,998,632	4,561,611	12,517,313	12,517,313
Zone 3	Chislehurst	2,935,661	237,740	17,081,508	20,254,909	24,009,677	24,009,677
Zone 3	Deptford	4,318	195	9,364	13,877	21,853	21,853
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	12,871,390	962,494	44,895,581	58,729,465	95,806,912	95,806,912
Zone 3	All Other	3,043,308	1,213,172	17,974,746	22,231,226	36,100,058	36,100,058
Zone 3	Total	19,507,614	2,498,085	86,110,542	108,116,241	172,563,119	172,563,119
Out of Area	London West End	39,261,551	10,764,904	37,503,754	87,530,210		
Out of Area	London City	14,265,308	4,664,271	12,833,140	31,762,719		
Out of Area	London Bridge	3,054,956	1,001,491	3,958,707	8,015,154		
Out of Area	Canary Wharf	10,258,774	1,580,290	5,276,913	17,115,977		
Out of Area	Bluewater	57,021,360	68,488,274	22,510,153	148,019,787		
Out of Area	Catford	218,372	75,865	5,233,949	5,528,186		
Out of Area	Petts Wood	21,543	17,445	195,063	234,052		
Out of Area	Beckenham	55,650	23,373	378,532	457,555		
Out of Area	Brixton	227,648	52,434	481,914	761,996		
Out of Area	Downham	54,386	11,014	1,882,165	1,947,565		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	7,117,387	15,109,633	5,390,741	27,617,761		
Out of Area	All Other	172,771,237	114,309,812	227,132,732	514,213,781		
Out of Area	Total	304,328,172	216,098,807	322,777,765	843,204,744		
Online Expenditure		436,118,648	235,721,055	337,462,691	1,009,302,394		
Total Expenditure		1,168,144,494	645,227,318	823,425,555	2,636,797,367	1,184,293,023	1,184,293,023
Expenditure Excluding Online		732,025,845.75	409,506,262.64	485,962,864.59	1,627,494,972.98	1,184,293,022.60	1,184,293,022.60

TABLE 4: COMPARISON TURNOVER MARKET SHARES EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	0.23%	0.16%	0.01%	0.15%	0.26%	0.26%
Zone 1	Blackheath (London)	0.94%	0.04%	0.57%	0.60%	1.21%	1.21%
Zone 1	Eltham	10.23%	3.87%	2.66%	6.37%	9.50%	9.50%
Zone 1	Greenwich East	0.57%	0.00%	0.00%	0.26%	0.37%	0.37%
Zone 1	Greenwich Peninsula/Charlton Riverside	19.93%	4.85%	5.24%	11.75%	32.00%	32.00%
Zone 1	Greenwich Village	1.09%	0.07%	0.59%	0.68%	1.30%	1.30%
Zone 1	Kidbrooke	0.49%	0.07%	0.13%	0.27%	0.41%	0.41%
Zone 1	Lee	1.64%	0.04%	2.73%	1.56%	2.31%	2.31%
Zone 1	North Greenwich	0.91%	0.27%	0.37%	0.59%	1.94%	1.94%
Zone 1	Plumstead	0.26%	0.04%	0.01%	0.13%	0.24%	0.24%
Zone 1	Thamesmead	0.76%	0.32%	0.01%	0.43%	0.69%	0.69%
Zone 1	Woolwich	5.80%	0.55%	0.30%	2.84%	4.67%	4.67%
Zone 1	All Other	7.24%	3.11%	2.01%	4.64%	7.67%	7.67%
Zone 1	Total	50.08%	13.40%	14.63%	30.26%	62.57%	62.57%
Zone 2	Bexley	0.01%	0.23%	0.01%	0.06%	0.19%	0.19%
Zone 2	Bexleyheath	3.15%	21.09%	0.33%	6.82%	13.86%	13.86%
Zone 2	Sidcup	0.07%	1.18%	0.06%	0.35%	0.60%	0.60%
Zone 2	Sidcup - Crittalls Corner Retail Park	0.20%	1.59%	0.64%	0.68%	2.26%	2.26%
Zone 2	Welling	0.75%	4.27%	0.04%	1.42%	2.20%	2.20%
Zone 2	All Other	1.49%	4.85%	0.16%	1.94%	3.76%	3.76%
Zone 2	Total	5.68%	33.22%	1.23%	11.28%	22.86%	22.86%
Zone 3	Catford	0.02%	0.01%	0.44%	0.14%	0.35%	0.35%
Zone 3	Catford - Bromley Road Retail Park	0.07%	0.01%	0.82%	0.28%	1.06%	1.06%
Zone 3	Chislehurst	0.40%	0.06%	3.51%	1.24%	2.03%	2.03%
Zone 3	Deptford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Downham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Lewisham	1.76%	0.24%	9.24%	3.61%	8.09%	8.09%
Zone 3	All Other	0.42%	0.30%	3.70%	1.37%	3.05%	3.05%
Zone 3	Total	2.66%	0.61%	17.72%	6.64%	14.57%	14.57%
Out of Area	London West End	5.36%	2.63%	7.72%	5.38%		
Out of Area	London City	1.95%	1.14%	2.64%	1.95%		
Out of Area	London Bridge	0.42%	0.24%	0.81%	0.49%		
Out of Area	Canary Wharf	1.40%	0.39%	1.09%	1.05%		
Out of Area	Bluewater	7.79%	16.72%	4.63%	9.09%		
Out of Area	Catford	0.03%	0.02%	1.08%	0.34%		
Out of Area	Petts Wood	0.00%	0.00%	0.04%	0.01%		
Out of Area	Beckenham	0.01%	0.01%	0.08%	0.03%		
Out of Area	Brixton	0.03%	0.01%	0.10%	0.05%		
Out of Area	Downham	0.01%	0.00%	0.39%	0.12%		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	0.97%	3.69%	1.11%	1.70%		
Out of Area	All Other	23.60%	27.91%	46.74%	31.60%		
Out of Area	Total	41.57%	52.77%	66.42%	51.81%		
Total Expenditure		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

TABLE 5: 2025 COMPARISON TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	1,900,262	740,917	44,366	2,685,545	782,114	3,467,659
Zone 1	Blackheath (London)	7,851,779	184,277	3,353,535	11,389,591	5,265,351	16,654,942
Zone 1	Eltham	85,413,875	17,844,601	15,636,051	118,894,527	10,136,411	129,030,938
Zone 1	Greenwich East	4,758,311	5,179	20,248	4,783,738	163,876	4,947,614
Zone 1	Greenwich Peninsula/Charlton Riverside	166,313,299	22,372,711	30,847,394	219,533,404	215,559,504	435,092,908
Zone 1	Greenwich Village	9,072,486	317,546	3,445,270	12,835,302	5,022,407	17,857,709
Zone 1	Kidbrooke	4,078,699	307,863	744,048	5,130,610	499,851	5,630,461
Zone 1	Lee	13,651,047	205,734	16,079,503	29,936,284	2,254,635	32,190,918
Zone 1	North Greenwich	7,600,719	1,234,161	2,192,433	11,027,313	15,381,250	26,408,563
Zone 1	Plumstead	2,160,394	186,358	32,282	2,379,034	813,969	3,193,002
Zone 1	Thamesmead	6,369,290	1,468,551	63,641	7,901,482	1,348,627	9,250,109
Zone 1	Woolwich	48,399,674	2,558,243	1,780,265	52,738,183	10,467,380	63,205,563
Zone 1	All Other	60,430,641	14,359,132	11,813,489	86,603,261	17,579,978	104,183,239
Zone 1	Total	418,000,475	61,785,272	86,052,525	565,838,273	285,275,352	851,113,625
Zone 2	Bexley	77,105	1,071,408	34,891	1,183,405	1,290,358	2,473,763
Zone 2	Bexleyheath	26,328,378	97,232,190	1,953,338	125,513,907	60,005,029	185,518,935
Zone 2	Sidcup	608,645	5,439,292	334,102	6,382,038	1,716,803	8,098,841
Zone 2	Sidcup - Crittalls Corner Retail Park	1,691,301	7,352,049	3,781,418	12,824,768	17,994,754	30,819,522
Zone 2	Welling	6,279,790	19,676,201	229,173	26,185,164	3,203,459	29,388,624
Zone 2	All Other	12,434,850	22,371,301	928,222	35,734,373	14,652,155	50,386,528
Zone 2	Total	47,420,069	153,142,441	7,261,145	207,823,654	98,862,559	306,686,213
Zone 3	Catford	147,090	51,155	2,603,853	2,802,098	2,147,716	4,949,813
Zone 3	Catford - Bromley Road Retail Park	597,391	43,959	4,841,118	5,482,468	9,561,727	15,044,195
Zone 3	Chislehurst	3,347,257	267,650	20,680,471	24,295,378	4,503,773	28,799,151
Zone 3	Deptford	4,923	220	11,336	16,480	9,473	25,952
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	14,676,030	1,083,585	54,354,790	70,114,405	44,265,058	114,379,463
Zone 3	All Other	3,469,997	1,365,802	21,761,909	26,597,707	16,592,837	43,190,545
Zone 3	Total	22,242,688	2,812,370	104,253,478	129,308,536	77,080,584	206,389,119
Out of Area	London West End	44,766,236	12,119,239	45,405,554	102,291,028		
Out of Area	London City	16,265,382	5,251,084	15,537,000	37,053,466		
Out of Area	London Bridge	3,483,278	1,127,488	4,792,781	9,403,547		
Out of Area	Canary Wharf	11,697,111	1,779,106	6,388,725	19,864,942		
Out of Area	Bluewater	65,016,067	77,104,797	27,252,898	169,373,761		
Out of Area	Catford	248,989	85,410	6,336,708	6,671,107		
Out of Area	Petts Wood	24,564	19,640	236,162	280,366		
Out of Area	Beckenham	63,452	26,314	458,287	548,053		
Out of Area	Brixton	259,566	59,030	583,451	902,047		
Out of Area	Downham	62,012	12,400	2,278,725	2,353,136		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	8,115,284	17,010,579	6,526,535	31,652,398		
Out of Area	All Other	196,994,711	128,691,150	274,988,135	600,673,997		
Out of Area	Total	346,996,649	243,286,237	390,784,961	981,067,847		
Total Expenditure		834,659,881	461,026,320	588,352,109	1,884,038,310	461,218,494	1,364,188,957

TABLE 6: 2030 COMPARISON TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	2,111,529	813,064	48,958	2,973,550	865,990	3,839,540
Zone 1	Blackheath (London)	8,724,721	202,221	3,700,625	12,627,566	5,837,661	18,465,227
Zone 1	Eltham	94,909,982	19,582,216	17,254,376	131,746,574	11,232,119	142,978,693
Zone 1	Greenwich East	5,287,328	5,683	22,344	5,315,355	182,087	5,497,443
Zone 1	Greenwich Peninsula/Charlton Riverside	184,803,607	24,551,250	34,040,087	243,394,944	238,989,114	482,384,058
Zone 1	Greenwich Village	10,081,143	348,467	3,801,854	14,231,464	5,568,720	19,800,184
Zone 1	Kidbrooke	4,532,159	337,841	821,056	5,691,057	554,453	6,245,510
Zone 1	Lee	15,168,737	225,767	17,743,726	33,138,230	2,495,787	35,634,017
Zone 1	North Greenwich	8,445,749	1,354,337	2,419,349	12,219,435	17,044,059	29,263,494
Zone 1	Plumstead	2,400,581	204,504	35,623	2,640,709	903,499	3,544,208
Zone 1	Thamesmead	7,077,412	1,611,551	70,228	8,759,191	1,495,021	10,254,212
Zone 1	Woolwich	53,780,632	2,807,352	1,964,522	58,552,506	11,621,397	70,173,903
Zone 1	All Other	67,149,173	15,757,350	13,036,180	95,942,703	19,475,832	115,418,534
Zone 1	Total	464,472,752	67,801,603	94,958,929	627,233,283	316,265,738	943,499,022
Zone 2	Bexley	85,677	1,175,737	38,503	1,299,916	1,417,400	2,717,317
Zone 2	Bexleyheath	29,255,504	106,700,158	2,155,508	138,111,170	66,027,462	204,138,632
Zone 2	Sidcup	676,312	5,968,942	368,681	7,013,935	1,886,787	8,900,722
Zone 2	Sidcup - Crittalls Corner Retail Park	1,879,335	8,067,953	4,172,794	14,120,082	19,812,243	33,932,325
Zone 2	Welling	6,977,961	21,592,168	252,893	28,823,022	3,526,171	32,349,194
Zone 2	All Other	13,817,327	24,549,703	1,024,292	39,391,322	16,151,613	55,542,935
Zone 2	Total	52,692,117	168,054,661	8,012,670	228,759,448	108,821,676	337,581,124
Zone 3	Catford	163,443	56,136	2,873,351	3,092,930	2,370,629	5,463,559
Zone 3	Catford - Bromley Road Retail Park	663,808	48,239	5,342,172	6,054,219	10,558,892	16,613,110
Zone 3	Chislehurst	3,719,397	293,712	22,820,892	26,834,001	4,974,372	31,808,373
Zone 3	Deptford	5,471	241	12,510	18,222	10,474	28,696
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	16,307,675	1,189,099	59,980,490	77,477,264	48,913,424	126,390,688
Zone 3	All Other	3,855,783	1,498,796	24,014,258	29,368,837	18,321,592	47,690,429
Zone 3	Total	24,715,576	3,086,224	115,043,673	142,845,473	85,149,382	227,994,855
Out of Area	London West End	49,743,237	13,299,348	50,105,011	113,147,596		
Out of Area	London City	18,073,728	5,762,407	17,145,074	40,981,209		
Out of Area	London Bridge	3,870,540	1,237,277	5,288,832	10,396,649		
Out of Area	Canary Wharf	12,997,567	1,952,346	7,049,956	21,999,869		
Out of Area	Bluewater	72,244,395	84,612,864	30,073,562	186,930,821		
Out of Area	Catford	276,671	93,727	6,992,555	7,362,952		
Out of Area	Petts Wood	27,295	21,552	260,605	309,452		
Out of Area	Beckenham	70,507	28,876	505,719	605,102		
Out of Area	Brixton	288,424	64,778	643,838	997,040		
Out of Area	Downham	68,906	13,607	2,514,572	2,597,085		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	9,017,521	18,666,981	7,202,029	34,886,532		
Out of Area	All Other	218,896,104	141,222,430	303,449,301	663,567,836		
Out of Area	Total	385,574,893	266,976,194	431,231,054	1,083,782,141		
Total Expenditure		927,455,338	505,918,682	649,246,325	2,082,620,345	510,236,797	1,509,075,000

TABLE 7: 2035 COMPARISON TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	2,388,295	911,080	55,219	3,354,594	976,961	4,331,555
Zone 1	Blackheath (London)	9,868,305	226,599	4,173,880	14,268,783	6,596,387	20,865,171
Zone 1	Eltham	107,350,212	21,942,884	19,460,957	148,754,052	12,682,100	161,436,152
Zone 1	Greenwich East	5,980,359	6,369	25,201	6,011,929	205,950	6,217,879
Zone 1	Greenwich Peninsula/Charlton Riverside	209,026,554	27,510,942	38,393,313	274,930,809	269,954,130	544,884,940
Zone 1	Greenwich Village	11,402,518	390,475	4,288,055	16,081,049	6,292,456	22,373,505
Zone 1	Kidbrooke	5,126,207	378,569	926,058	6,430,833	626,526	7,057,359
Zone 1	Lee	17,156,964	252,984	20,012,886	37,422,834	2,818,480	40,241,314
Zone 1	North Greenwich	9,552,767	1,517,604	2,728,748	13,799,119	19,247,454	33,046,573
Zone 1	Plumstead	2,715,235	229,158	40,179	2,984,571	1,021,149	4,005,720
Zone 1	Thamesmead	8,005,077	1,805,826	79,209	9,890,112	1,688,046	11,578,159
Zone 1	Woolwich	60,829,874	3,145,783	2,215,755	66,191,412	13,137,553	79,328,965
Zone 1	All Other	75,950,683	17,656,923	14,703,315	108,310,922	21,986,511	130,297,433
Zone 1	Total	525,353,050	75,975,195	107,102,776	708,431,022	357,233,704	1,065,664,726
Zone 2	Bexley	96,907	1,317,473	43,427	1,457,807	1,589,561	3,047,368
Zone 2	Bexleyheath	33,090,139	119,563,034	2,431,166	155,084,339	74,141,906	229,226,245
Zone 2	Sidcup	764,959	6,688,508	415,830	7,869,297	2,116,884	9,986,180
Zone 2	Sidcup - Crittalls Corner Retail Park	2,125,667	9,040,558	4,706,432	15,872,658	22,271,326	38,143,983
Zone 2	Welling	7,892,591	24,195,139	285,234	32,372,963	3,960,467	36,333,430
Zone 2	All Other	15,628,419	27,509,209	1,155,284	44,292,912	18,161,410	62,454,323
Zone 2	Total	59,598,683	188,313,921	9,037,373	256,949,977	122,241,553	379,191,530
Zone 3	Catford	184,866	62,903	3,240,810	3,488,579	2,673,882	6,162,461
Zone 3	Catford - Bromley Road Retail Park	750,816	54,055	6,025,357	6,830,227	11,912,293	18,742,520
Zone 3	Chislehurst	4,206,913	329,120	25,739,348	30,275,381	5,612,320	35,887,701
Zone 3	Deptford	6,188	270	14,110	20,568	11,822	32,390
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	18,445,187	1,332,447	67,651,111	87,428,745	55,196,054	142,624,799
Zone 3	All Other	4,361,176	1,679,479	27,085,327	33,125,982	20,665,467	53,791,448
Zone 3	Total	27,955,145	3,458,273	129,756,063	161,169,481	96,071,837	257,241,319
Out of Area	London West End	56,263,282	14,902,606	56,512,703	127,678,591		
Out of Area	London City	20,442,723	6,457,074	19,337,676	46,237,474		
Out of Area	London Bridge	4,377,867	1,386,433	5,965,196	11,729,496		
Out of Area	Canary Wharf	14,701,210	2,187,705	7,951,541	24,840,456		
Out of Area	Bluewater	81,713,756	94,813,081	33,919,527	210,446,364		
Out of Area	Catford	312,935	105,025	7,886,800	8,304,760		
Out of Area	Petts Wood	30,872	24,151	293,932	348,955		
Out of Area	Beckenham	79,748	32,357	570,393	682,499		
Out of Area	Brixton	326,229	72,587	726,175	1,124,991		
Out of Area	Downham	77,938	15,247	2,836,149	2,929,334		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	10,199,484	20,917,316	8,123,062	39,239,862		
Out of Area	All Other	247,587,691	158,247,022	342,255,994	748,090,707		
Out of Area	Total	436,113,735	299,160,604	486,379,150	1,221,653,489		
Total Expenditure		1,049,020,613	566,907,994	732,275,362	2,348,203,969	575,547,095	1,702,097,575

TABLE 8: 2037 COMPARISON TURNOVER EXCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	2,507,146	953,109	57,946	3,518,201	1,024,609	4,542,810
Zone 1	Blackheath (London)	10,359,393	237,052	4,380,008	14,976,452	6,923,539	21,899,992
Zone 1	Eltham	112,692,405	22,955,124	20,422,041	156,069,570	13,305,788	169,375,358
Zone 1	Greenwich East	6,277,967	6,662	26,446	6,311,075	216,198	6,527,273
Zone 1	Greenwich Peninsula/Charlton Riverside	219,428,584	28,780,042	40,289,376	288,498,002	283,275,736	571,773,738
Zone 1	Greenwich Village	11,969,955	408,488	4,499,822	16,878,265	6,604,404	23,482,669
Zone 1	Kidbrooke	5,381,308	396,032	971,791	6,749,132	657,536	7,406,668
Zone 1	Lee	18,010,765	264,654	21,001,228	39,276,648	2,958,099	42,234,747
Zone 1	North Greenwich	10,028,152	1,587,612	2,863,508	14,479,273	20,196,154	34,675,426
Zone 1	Plumstead	2,850,356	239,729	42,163	3,132,248	1,071,676	4,203,924
Zone 1	Thamesmead	8,403,443	1,889,130	83,121	10,375,694	1,770,926	12,146,620
Zone 1	Woolwich	63,857,021	3,290,900	2,325,181	69,473,103	13,788,897	83,262,000
Zone 1	All Other	79,730,305	18,471,450	15,429,442	113,631,197	23,066,497	136,697,694
Zone 1	Total	551,496,801	79,479,985	112,392,075	743,368,861	374,860,058	1,118,228,919
Zone 2	Bexley	101,730	1,378,249	45,571	1,525,550	1,663,427	3,188,977
Zone 2	Bexleyheath	34,736,842	125,078,562	2,551,230	162,366,634	77,623,387	239,990,020
Zone 2	Sidcup	803,027	6,997,053	436,366	8,236,446	2,215,649	10,452,094
Zone 2	Sidcup - Crittalls Corner Retail Park	2,231,449	9,457,605	4,938,861	16,627,915	23,331,047	39,958,962
Zone 2	Welling	8,285,359	25,311,278	299,320	33,895,957	4,146,788	38,042,745
Zone 2	All Other	16,406,154	28,778,228	1,212,338	46,396,721	19,024,034	65,420,755
Zone 2	Total	62,564,561	197,000,976	9,483,686	269,049,223	128,004,331	397,053,553
Zone 3	Catford	194,066	65,805	3,400,858	3,660,729	2,805,829	6,466,558
Zone 3	Catford - Bromley Road Retail Park	788,179	56,548	6,322,921	7,167,648	12,500,774	19,668,422
Zone 3	Chislehurst	4,416,267	344,302	27,010,492	31,771,061	5,889,583	37,660,644
Zone 3	Deptford	6,496	283	14,806	21,585	12,407	33,992
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	19,363,096	1,393,914	70,992,079	91,749,089	57,923,600	149,672,688
Zone 3	All Other	4,578,206	1,756,954	28,422,943	34,758,103	21,683,657	56,441,760
Zone 3	Total	29,346,310	3,617,806	136,164,100	169,128,215	100,815,849	269,944,064
Out of Area	London West End	59,063,176	15,590,073	59,303,598	133,956,848		
Out of Area	London City	21,460,038	6,754,944	20,292,672	48,507,655		
Out of Area	London Bridge	4,595,728	1,450,390	6,259,789	12,305,907		
Out of Area	Canary Wharf	15,432,803	2,288,625	8,344,230	26,065,659		
Out of Area	Bluewater	85,780,172	99,186,875	35,594,652	220,561,700		
Out of Area	Catford	328,508	109,870	8,276,291	8,714,670		
Out of Area	Petts Wood	32,408	25,265	308,448	366,121		
Out of Area	Beckenham	83,717	33,850	598,562	716,129		
Out of Area	Brixton	342,463	75,936	762,037	1,180,436		
Out of Area	Downham	81,816	15,951	2,976,213	3,073,980		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	10,707,052	21,882,247	8,524,222	41,113,521		
Out of Area	All Other	259,908,684	165,547,069	359,158,396	784,614,148		
Out of Area	Total	457,816,566	312,961,095	510,399,111	1,281,176,772		
Total Expenditure		1,101,224,239	593,059,861	768,438,971	2,462,723,071	603,680,238	1,785,226,537

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TABLE 9: SUMMARY OF RETAINED COMPARISON TURNOVER FOR GREENWICH BOROUGH INCLUDING TURNOVER INFLOW FROM OUTSIDE THE STUDY AREA (£M)

	Retail Location	2025	2030	2035	2037
Zone 1	Abbey Wood	3,467,659	3,839,540	4,331,555	4,542,810
Zone 1	Blackheath (London)	16,654,942	18,465,227	20,865,171	21,899,992
Zone 1	Eltham	129,030,938	142,978,693	161,436,152	169,375,358
Zone 1	Greenwich East	4,947,614	5,497,443	6,217,879	6,527,273
Zone 1	Greenwich Peninsula/Charlton Riverside	435,092,908	482,384,058	544,884,940	571,773,738
Zone 1	Greenwich Village	17,857,709	19,800,184	22,373,505	23,482,669
Zone 1	Kidbrooke	5,630,461	6,245,510	7,057,359	7,406,668
Zone 1	Lee	32,190,918	35,634,017	40,241,314	42,234,747
Zone 1	North Greenwich	26,408,563	29,263,494	33,046,573	34,675,426
Zone 1	Plumstead	3,193,002	3,544,208	4,005,720	4,203,924
Zone 1	Thamesmead	9,250,109	10,254,212	11,578,159	12,146,620
Zone 1	Woolwich	63,205,563	70,173,903	79,328,965	83,262,000
Zone 1	All Other	104,183,239	115,418,534	130,297,433	136,697,694
Zone 1	Total	851,113,625	943,499,022	1,065,664,726	1,118,228,919

Source: Tables 4 to 7

TABLE 10: GREENWICH BOROUGH - FORECAST CAPACITY FOR COMPARISON FLOORSPACE (2025 TO 2037) EXCLUDING COMMITMENTS

			2025	2030	2035	2037
Step 1:		Total Forecast 'Current' Turnover of All Floorspace (£m):	£851.1	£943.5	£1,065.7	£1,118.2
Step 2:		Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£851.1	£955.4	£1,081.0	£1,135.7
Step 3:		**Net Residual Expenditure - Excluding Commitments (£m):**	-	-£11.9	-£15.3	-£17.5
Step 4:		**Capacity for New Comparison Floorspace:**				
	(i)	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,030	£6,769	£7,659	£8,046
	(ii)	**Net Floorspace Capacity (sq m):**	**-**	**-1,764**	**-2,002**	**-2,174**
	(iii)	Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv)	Gross Floorspace Capacity (sq m):		-2,520	-2,859	-3,105

Notes:

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

Step 2: It has been assumed for the purpose of this assessment that the Borough's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.

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

Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on average sales performance of comparison goods retailers.

APPENDIX C6 LEISURE EXPENDITURE ANALYSIS

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TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2025 - 2037)

		2025	2030	2035	2037
Zone 1	Royal Greenwich	316,532	325,901	334,298	337,554
Zone 2	Bexley / Bromley	162,408	165,138	167,817	168,865
Zone 3	Bromley/ Lewisham	213,657	218,461	223,458	225,553
Total Study Area :		692,597	709,500	725,573	731,972
Royal Borough of Greenwich:		299,793	308,883	316,999	320,159

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

Notes: Population projections (2025 to 2037) derived from Experian and based on ONS 2018-based Sub-National Population Projections (released in June 2020).

TABLE 2: LEISURE EXPENDITURE PER HEAD (2023 prices)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	Royal Greenwich	£270	£363	£90	£119	£290	£1,789	£2,921
Zone 2	Bexley / Bromley	£286	£449	£131	£128	£413	£1,952	£3,359
Zone 3	Bromley/ Lewisham	£289	£393	£100	£118	£328	£1,886	£3,114
Study Area Average:		£282	£402	£107	£122	£344	£1,876	£3,131
Royal Borough of Greenwich:		£270	£362	£89	£119	£289	£1,785	£2,914

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

TABLE 3: LEISURE EXPENDITURE PER HEAD - 2025

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	Royal Greenwich	£266	£357	£89	£117	£285	£1,760	£2,874
Zone 2	Bexley / Bromley	£281	£442	£129	£126	£406	£1,921	£3,305
Zone 3	Bromley/ Lewisham	£284	£387	£98	£116	£323	£1,856	£3,064
Study Area Average:		£277	£395	£105	£120	£338	£1,846	£3,081
Royal Borough of Greenwich:		£266	£356	£88	£117	£284	£1,756	£2,867

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

TABLE 3: TOTAL AVAILABLE LEISURE EXPENDITURE - 2025 to 2037

		2025	2030	2035	2037	Growth 2025-2035		Growth 2025-2037	
Zone 1	Royal Greenwich	£909.8	£956.5	£1,014.0	£1,060.2	£104.2	11.5%	£150.4	16.5%
Zone 2	Bexley / Bromley	£536.8	£557.4	£585.4	£609.9	£48.6	9.0%	£73.1	13.6%
Zone 3	Bromley/ Lewisham	£654.7	£683.6	£722.6	£755.2	£67.9	10.4%	£100.6	15.4%
Total Study Area:		£2,101.3	£2,197.5	£2,321.9	£2,425.4	£220.7	10.5%	£324.1	15.4%
Royal Borough of Greenwich:		£859.6	£904.4	£959.2	£1,003.2	£99.6	11.6%	£143.6	16.7%

TABLE 4: STUDY AREA LEISURE EXPENDITURE GROWTH BY LEISURE CATEGORY - 2025 to 2037

	2025	2030	2035	2037	Growth (£m): 2025-2035	Growth (£m): 2025-2037
Accommodation services (hotels, guesthouses, B&Bs)	£189.0	£197.7	£208.9	£218.2	£19.8	£29.2
Cultural services (cinema, theatre, concerts, etc)	£269.5	£281.9	£297.8	£311.1	£28.3	£41.6
Games of chance (bingo, casino, betting)	£71.8	£75.1	£79.3	£82.9	£7.5	£11.1
Personal grooming (hairdressers, barbers, etc)	£81.6	£85.4	£90.2	£94.2	£8.6	£12.6
Recreational and sporting services (gym, fitness, etc)	£230.6	£241.2	£254.8	£266.2	£24.2	£35.6
Restaurants, cafes, bars, etc	£1,258.7	£1,316.3	£1,390.8	£1,452.8	£132.2	£194.1
Total Study Area:	£2,101.3	£2,197.5	£2,321.9	£2,425.4	£220.7	£324.1

TABLE 6: TOTAL FORECAST AVAILABLE EXPENDITURE FOR FOOD & BEVERAGE BY ZONE - 2025 to 2037

		2025	2030	2035	2037	Growth (£m) 2025-2035	Growth (£m) 2025-2037
Zone 1	Royal Greenwich	£548.3	£566.2	£598.4	£625.7	£50.1	£77.4
Zone 2	Bexley / Bromley	£307.0	£313.1	£327.8	£341.5	£20.8	£34.6
Zone 3	Bromley/ Lewisham	£390.2	£400.1	£421.7	£440.8	£31.5	£50.6
Total Study Area:		£1,245.4	£1,279.4	£1,348.0	£1,408.0	£102.5	£162.6
Royal Borough of Greenwich:		£518.1	£535.5	£566.2	£592.2	£48.1	£74.0

TABLE 6.1: TOTAL AVAILABLE EXPENDITURE FOR FOOD & BEVERAGE CATEGORIES BY ZONE

		2025	2030	2035	2037
Zone 1	Royal Greenwich	£557,215,336	£589,364,521	£625,385,685	£640,348,443
Zone 2	Bexley / Bromley	£311,948,089	£325,847,796	£342,546,539	£349,528,196
Zone 3	Bromley/ Lewisham	£396,509,788	£416,489,023	£440,698,338	£451,079,463
Total Study Area:		£1,265,673,214	£1,331,701,340	£1,408,630,562	£1,440,956,102
Royal Borough of Greenwich:		£526,568,417	£557,339,959	£591,697,766	£605,991,725

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

TABLE 7: TOTAL FORECAST AVAILABLE EXPENDITURE FOR CULTURAL SERVICES BY ZONE - 2025 to 2037

		2025	2030	2035	2037	Growth (£m) 2025-2035	Growth (£m) 2025-2037
Zone 1	Royal Greenwich	£111.3	£117.7	£124.9	£127.9	£13.6	£16.6
Zone 2	Bexley / Bromley	£70.6	£73.8	£77.5	£79.1	£6.9	£8.5
Zone 3	Bromley/ Lewisham	£81.3	£85.4	£90.4	£92.5	£9.1	£11.2
Total Study Area:		£263.2	£276.8	£292.8	£299.5	£29.6	£36.3
Royal Borough of Greenwich:		£105.1	£111.2	£118.1	£120.9	£13.0	£15.8

APPENDIX C7 FOOD & BEVERAGE EXPENDITURE MARKET SHARE ANALYSIS

Lambert Smith Hampton

TABLE 1: MARKET SHARE INCLUDING ONLINE TRANSACTIONS (%)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	0.10%	0.10%	0.01%	0.07%	0.15%	0.25%
Zone 1	Blackheath (London)	3.16%	0.63%	1.48%	1.96%	3.94%	6.63%
Zone 1	Eltham	1.79%	0.63%	0.52%	1.09%	1.06%	3.13%
Zone 1	Greenwich East	0.46%	0.03%	0.03%	0.21%	0.38%	0.70%
Zone 1	Greenwich Peninsula/Charlton Riverside	1.53%	0.34%	0.30%	0.84%	2.64%	3.33%
Zone 1	Greenwich Village	2.49%	0.50%	1.36%	1.60%	11.01%	9.35%
Zone 1	Kidbrooke	0.11%	0.01%	0.01%	0.05%	0.09%	0.17%
Zone 1	Lee	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 1	North Greenwich	1.51%	0.69%	0.53%	1.00%	32.11%	18.60%
Zone 1	Plumstead	0.53%	0.14%	0.04%	0.28%	0.70%	1.02%
Zone 1	Thamesmead	0.95%	0.42%	0.03%	0.54%	0.65%	1.60%
Zone 1	Woolwich	1.36%	0.21%	0.06%	0.66%	1.49%	2.32%
Zone 1	All Other	4.41%	1.37%	1.59%	2.74%	10.87%	11.98%
Zone 1	Total	18.39%	5.09%	5.96%	11.06%	65.09%	59.08%
Zone 2	Bexley	0.02%	0.45%	0.01%	0.14%	0.57%	0.62%
Zone 2	Bexleyheath	0.71%	4.65%	0.11%	1.67%	6.92%	7.45%
Zone 2	Sidcup	0.29%	2.88%	0.20%	1.01%	2.33%	3.56%
Zone 2	Sidcup - Crittalls Corner Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 2	Welling	0.39%	1.94%	0.04%	0.73%	0.89%	2.19%
Zone 2	All Other	1.34%	7.17%	0.25%	2.70%	8.04%	10.46%
Zone 2	Total	2.75%	17.09%	0.61%	6.26%	18.74%	24.28%
Zone 3	Catford	0.05%	0.03%	0.56%	0.19%	1.00%	0.96%
Zone 3	Catford - Bromley Road Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Chislehurst	0.40%	0.55%	2.06%	0.91%	3.31%	3.83%
Zone 3	Deptford	0.03%	0.00%	0.19%	0.07%	0.25%	0.29%
Zone 3	Downham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 3	Lewisham	0.38%	0.09%	1.49%	0.61%	2.51%	2.72%
Zone 3	All Other	1.16%	0.59%	3.98%	1.79%	9.10%	8.85%
Zone 3	Total	2.03%	1.27%	8.28%	3.58%	16.17%	16.64%
Out of Area	London West End	5.14%	4.06%	5.88%	5.04%		
Out of Area	London City	3.67%	3.47%	4.12%	3.74%		
Out of Area	London Bridge	1.86%	1.66%	2.58%	2.01%		
Out of Area	Canary Wharf	1.46%	0.83%	1.01%	1.15%		
Out of Area	Bluewater	1.58%	4.13%	0.90%	2.12%		
Out of Area	Catford	0.07%	0.03%	0.58%	0.20%		
Out of Area	Petts Wood	0.02%	0.05%	0.14%	0.06%		
Out of Area	Beckenham	0.04%	0.05%	0.16%	0.08%		
Out of Area	Brixton	0.03%	0.03%	0.08%	0.04%		
Out of Area	Downham	0.01%	0.00%	0.10%	0.03%		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	0.03%	0.12%	0.03%	0.06%		
Out of Area	All Other	18.55%	21.14%	24.62%	21.01%		
Out of Area	Total	32.47%	35.57%	40.19%	35.55%		
Online Expenditure		44.35%	40.99%	44.97%	43.56%		
Total Expenditure		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

TABLE 2: 2025 FOOD & BEVERAGE TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	573,247	307,344	22,753	903,343	395,069	1,298,412
Zone 1	Blackheath (London)	17,595,837	1,977,510	5,857,617	25,430,964	10,929,072	36,360,036
Zone 1	Eltham	9,970,637	1,951,664	2,042,998	13,965,299	2,899,006	16,864,305
Zone 1	Greenwich East	2,548,533	100,398	119,800	2,768,731	1,036,807	3,805,538
Zone 1	Greenwich Peninsula/Charlton Riverside	8,517,185	1,066,057	1,201,468	10,784,710	7,242,960	18,027,670
Zone 1	Greenwich Village	13,856,765	1,559,673	5,394,562	20,810,999	30,634,666	51,445,666
Zone 1	Kidbrooke	611,302	35,708	30,091	677,102	255,971	933,073
Zone 1	Lee	0	0	0	0	0	0
Zone 1	North Greenwich	8,421,443	2,165,440	2,118,544	12,705,427	87,148,260	99,853,687
Zone 1	Plumstead	2,953,478	442,867	157,491	3,553,835	1,899,139	5,452,974
Zone 1	Thamesmead	5,299,691	1,318,013	99,896	6,717,600	1,731,826	8,449,427
Zone 1	Woolwich	7,579,178	658,848	255,961	8,493,987	4,065,057	12,559,044
Zone 1	All Other	24,568,629	4,288,703	6,313,060	35,170,392	29,793,183	64,963,576
Zone 1	Total	102,495,924	15,872,226	23,614,241	141,982,390	178,031,018	320,013,408
Zone 2	Bexley	115,743	1,398,209	39,856	1,553,809	1,338,238	2,892,047
Zone 2	Bexleyheath	3,982,852	14,496,899	419,658	18,899,409	16,732,266	35,631,674
Zone 2	Sidcup	1,590,521	8,999,594	811,590	11,401,705	5,621,561	17,023,266
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	2,146,092	6,062,567	170,128	8,378,788	2,167,956	10,546,744
Zone 2	All Other	7,487,661	22,358,104	978,565	30,824,330	19,595,212	50,419,542
Zone 2	Total	15,322,869	53,315,374	2,419,797	71,058,040	45,455,232	116,513,272
Zone 3	Catford	296,551	106,684	2,215,845	2,619,080	2,932,353	5,551,433
Zone 3	Catford - Bromley Road Retail Park	0	0	0	0	0	0
Zone 3	Chislehurst	2,232,430	1,710,680	8,153,644	12,096,754	9,368,366	21,465,120
Zone 3	Deptford	168,986	10,677	761,911	941,574	739,226	1,680,801
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	2,144,412	268,094	5,927,717	8,340,224	7,300,634	15,640,858
Zone 3	All Other	6,453,315	1,851,475	15,765,586	24,070,375	26,070,600	50,140,975
Zone 3	Total	11,295,694	3,947,609	32,824,704	48,068,007	46,411,179	94,479,186
Out of Area	London West End	28,653,515	12,651,926	23,300,616	64,606,058		
Out of Area	London City	20,475,794	10,835,466	16,328,775	47,640,035		
Out of Area	London Bridge	10,363,597	5,190,847	10,220,665	25,775,109		
Out of Area	Canary Wharf	8,137,944	2,577,896	3,989,661	14,705,502		
Out of Area	Bluewater	8,827,574	12,890,290	3,568,661	25,286,526		
Out of Area	Catford	380,814	80,443	2,287,743	2,749,000		
Out of Area	Petts Wood	126,861	150,004	561,656	838,521		
Out of Area	Beckenham	219,092	144,630	630,465	994,187		
Out of Area	Brixton	176,080	89,344	305,961	571,385		
Out of Area	Downham	52,373	12,195	395,458	460,026		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	188,005	388,183	133,910	710,098		
Out of Area	All Other	103,351,992	65,944,521	97,625,349	266,921,861		
Out of Area	Total	180,953,642	110,955,744	159,348,921	451,258,308		
Online Expenditure		247,147,207	127,857,136	178,302,126	553,306,469		
Total Expenditure		557,215,336	311,948,089	396,509,788	1,265,673,214	269,897,430	531,005,866
Expenditure Excluding Online		310,068,129	184,090,953	218,207,662	712,366,744	269,897,430	531,005,866

	Zone 1	Zone 2	Zone 3	Total Study Area
Retention excluding Online	33%	9%	11%	20%

TABLE 3: 2030 FOOD & BEVERAGE TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	606,321	321,038	23,899	951,259	416,024	1,367,282
Zone 1	Blackheath (London)	18,611,049	2,065,624	6,152,770	26,829,442	11,530,074	38,359,516
Zone 1	Eltham	10,545,904	2,038,626	2,145,940	14,730,470	3,057,845	17,788,315
Zone 1	Greenwich East	2,695,574	104,871	125,837	2,926,282	1,095,805	4,022,087
Zone 1	Greenwich Peninsula/Charlton Riverside	9,008,594	1,113,558	1,262,007	11,384,159	7,645,548	19,029,707
Zone 1	Greenwich Village	14,656,247	1,629,169	5,666,382	21,951,797	32,313,968	54,265,765
Zone 1	Kidbrooke	646,572	37,300	31,607	715,479	270,479	985,958
Zone 1	Lee	0	0	0	0	0	0
Zone 1	North Greenwich	8,907,328	2,261,927	2,225,292	13,394,548	91,875,034	105,269,581
Zone 1	Plumstead	3,123,882	462,600	165,426	3,751,908	2,004,988	5,756,896
Zone 1	Thamesmead	5,605,463	1,376,740	104,930	7,087,134	1,827,093	8,914,227
Zone 1	Woolwich	8,016,467	688,205	268,858	8,973,531	4,294,557	13,268,088
Zone 1	All Other	25,986,145	4,479,798	6,631,161	37,097,104	31,425,319	68,522,423
Zone 1	Total	108,409,545	16,579,456	24,804,109	149,793,111	187,756,735	337,549,845
Zone 2	Bexley	122,421	1,460,510	41,865	1,624,796	1,399,377	3,024,173
Zone 2	Bexleyheath	4,212,647	15,142,848	440,804	19,796,299	17,526,312	37,322,611
Zone 2	Sidcup	1,682,287	9,400,596	852,484	11,935,367	5,884,681	17,820,049
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	2,269,913	6,332,702	178,701	8,781,316	2,272,108	11,053,423
Zone 2	All Other	7,919,670	23,354,331	1,027,873	32,301,874	20,534,495	52,836,369
Zone 2	Total	16,206,939	55,690,987	2,541,725	74,439,652	47,616,972	122,056,624
Zone 3	Catford	313,660	111,438	2,327,496	2,752,595	3,081,838	5,834,432
Zone 3	Catford - Bromley Road Retail Park	0	0	0	0	0	0
Zone 3	Chislehurst	2,361,232	1,786,904	8,564,488	12,712,624	9,845,329	22,557,953
Zone 3	Deptford	178,736	11,152	800,302	990,191	777,395	1,767,586
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	2,268,137	280,040	6,226,402	8,774,578	7,680,847	16,455,425
Zone 3	All Other	6,825,646	1,933,972	16,559,978	25,319,596	27,423,630	52,743,227
Zone 3	Total	11,947,412	4,123,506	34,478,667	50,549,584	48,809,039	99,358,623
Out of Area	London West End	30,306,713	13,215,667	24,474,682	67,997,062		
Out of Area	London City	21,657,169	11,318,270	17,151,545	50,126,984		
Out of Area	London Bridge	10,961,537	5,422,139	10,735,662	27,119,338		
Out of Area	Canary Wharf	8,607,472	2,692,762	4,190,691	15,490,925		
Out of Area	Bluewater	9,336,892	13,464,653	3,748,478	26,550,022		
Out of Area	Catford	402,785	84,028	2,403,017	2,889,830		
Out of Area	Petts Wood	134,181	156,688	589,956	880,825		
Out of Area	Beckenham	231,733	151,074	662,232	1,045,040		
Out of Area	Brixton	186,239	93,324	321,378	600,942		
Out of Area	Downham	55,395	12,738	415,385	483,518		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	198,852	405,480	140,657	744,989		
Out of Area	All Other	109,315,005	68,882,861	102,544,470	280,742,336		
Out of Area	Total	191,393,973	115,899,684	167,378,154	474,671,810		
Online Expenditure		261,406,652	133,554,163	187,286,368	582,247,184		
Total Expenditure		589,364,521	325,847,796	416,489,023	749,454,157	284,182,746	558,965,093

TABLE 4: 2035 FOOD & BEVERAGE TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	643,379	337,491	25,288	1,006,158	440,033	1,446,191
Zone 1	Blackheath (London)	19,748,531	2,171,481	6,510,412	28,430,424	12,218,103	40,648,528
Zone 1	Eltham	11,190,456	2,143,100	2,270,677	15,604,233	3,239,227	18,843,459
Zone 1	Greenwich East	2,860,323	110,246	133,151	3,103,720	1,162,251	4,265,971
Zone 1	Greenwich Peninsula/Charlton Riverside	9,559,187	1,170,625	1,335,364	12,065,175	8,102,915	20,168,091
Zone 1	Greenwich Village	15,552,017	1,712,659	5,995,752	23,260,428	34,240,327	57,500,755
Zone 1	Kidbrooke	686,089	39,211	33,445	758,745	286,836	1,045,581
Zone 1	Lee	0	0	0	0	0	0
Zone 1	North Greenwich	9,451,732	2,377,845	2,354,642	14,184,219	97,291,494	111,475,713
Zone 1	Plumstead	3,314,809	486,307	175,042	3,976,158	2,124,825	6,100,983
Zone 1	Thamesmead	5,948,062	1,447,294	111,029	7,506,385	1,935,178	9,441,563
Zone 1	Woolwich	8,506,423	723,473	284,486	9,514,383	4,553,398	14,067,781
Zone 1	All Other	27,574,383	4,709,375	7,016,611	39,300,369	33,291,727	72,592,095
Zone 1	Total	115,035,391	17,429,105	26,245,901	158,710,396	198,886,315	357,596,711
Zone 2	Bexley	129,903	1,535,357	44,298	1,709,559	1,472,379	3,181,938
Zone 2	Bexleyheath	4,470,119	15,918,874	466,426	20,855,419	18,463,986	39,319,405
Zone 2	Sidcup	1,785,107	9,882,349	902,036	12,569,492	6,197,333	18,766,825
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	2,408,647	6,657,234	189,088	9,254,969	2,394,662	11,649,632
Zone 2	All Other	8,403,710	24,551,172	1,087,620	34,042,502	21,641,023	55,683,524
Zone 2	Total	17,197,486	58,544,987	2,689,469	78,431,941	50,169,384	128,601,325
Zone 3	Catford	332,831	117,149	2,462,787	2,912,767	3,261,168	6,173,935
Zone 3	Catford - Bromley Road Retail Park	0	0	0	0	0	0
Zone 3	Chislehurst	2,505,548	1,878,477	9,062,317	13,446,342	10,413,559	23,859,901
Zone 3	Deptford	189,660	11,724	846,822	1,048,206	822,942	1,871,148
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	2,406,762	294,391	6,588,324	9,289,477	8,131,566	17,421,043
Zone 3	All Other	7,242,820	2,033,082	17,522,562	26,798,465	29,025,392	55,823,857
Zone 3	Total	12,677,621	4,334,823	36,482,813	53,495,258	51,654,627	105,149,885
Out of Area	London West End	32,159,019	13,892,932	25,897,325	71,949,275		
Out of Area	London City	22,980,826	11,898,298	18,148,515	53,027,639		
Out of Area	London Bridge	11,631,491	5,700,008	11,359,695	28,691,194		
Out of Area	Canary Wharf	9,133,549	2,830,758	4,434,284	16,398,591		
Out of Area	Bluewater	9,907,550	14,154,676	3,966,366	28,028,593		
Out of Area	Catford	427,403	88,334	2,542,698	3,058,435		
Out of Area	Petts Wood	142,382	164,717	624,249	931,348		
Out of Area	Beckenham	245,896	158,816	700,726	1,105,439		
Out of Area	Brixton	197,622	98,107	340,059	635,788		
Out of Area	Downham	58,781	13,391	439,530	511,701		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	211,005	426,260	148,833	786,098		
Out of Area	All Other	115,996,190	72,412,905	108,505,087	296,914,182		
Out of Area	Total	203,091,714	121,839,202	177,107,367	502,038,283		
Online Expenditure		277,383,474	140,398,422	198,172,789	615,954,685		
Total Expenditure		625,385,685	342,546,539	440,698,338	792,675,878	300,710,326	591,347,921

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TABLE 5: 2037 FOOD & BEVERAGE TURNOVER MARKET SHARES INCLUDING ONLINE (£M)

	Retail Location	Zone 1	Zone 2	Zone 3	Total Study Area	Study Area Inflow	Total Expenditure
Zone 1	Abbey Wood	658,772	344,369	25,884	1,029,025	450,034	1,479,059
Zone 1	Blackheath (London)	20,221,028	2,215,739	6,663,772	29,100,539	12,506,088	41,606,627
Zone 1	Eltham	11,458,195	2,186,780	2,324,165	15,969,140	3,314,976	19,284,116
Zone 1	Greenwich East	2,928,758	112,493	136,288	3,177,539	1,189,894	4,367,432
Zone 1	Greenwich Peninsula/Charlton Riverside	9,787,896	1,194,484	1,366,820	12,349,200	8,293,665	20,642,865
Zone 1	Greenwich Village	15,924,109	1,747,565	6,136,989	23,808,663	35,047,353	58,856,016
Zone 1	Kidbrooke	702,505	40,010	34,232	776,747	293,641	1,070,389
Zone 1	Lee	0	0	0	0	0	0
Zone 1	North Greenwich	9,677,871	2,426,309	2,410,108	14,514,288	99,555,485	114,069,772
Zone 1	Plumstead	3,394,118	496,218	179,166	4,069,502	2,174,707	6,244,209
Zone 1	Thamesmead	6,090,373	1,476,793	113,645	7,680,810	1,980,146	9,660,956
Zone 1	Woolwich	8,709,945	738,219	291,188	9,739,351	4,661,064	14,400,415
Zone 1	All Other	28,234,118	4,805,360	7,181,895	40,221,372	34,071,918	74,293,290
Zone 1	Total	117,787,687	17,784,338	26,864,151	162,436,177	203,538,971	365,975,147
Zone 2	Bexley	133,011	1,566,650	45,342	1,745,003	1,502,907	3,247,910
Zone 2	Bexleyheath	4,577,069	16,243,327	477,413	21,297,810	18,855,649	40,153,458
Zone 2	Sidcup	1,827,816	10,083,767	923,285	12,834,869	6,328,176	19,163,045
Zone 2	Sidcup - Crittalls Corner Retail Park	0	0	0	0	0	0
Zone 2	Welling	2,466,276	6,792,919	193,542	9,452,737	2,445,834	11,898,571
Zone 2	All Other	8,604,774	25,051,565	1,113,240	34,769,579	22,103,230	56,872,809
Zone 2	Total	17,608,947	59,738,229	2,752,822	80,099,998	51,235,795	131,335,793
Zone 3	Catford	340,794	119,536	2,520,801	2,981,131	3,337,710	6,318,841
Zone 3	Catford - Bromley Road Retail Park	0	0	0	0	0	0
Zone 3	Chislehurst	2,565,494	1,916,764	9,275,790	13,758,048	10,654,960	24,413,009
Zone 3	Deptford	194,198	11,963	866,769	1,072,930	842,353	1,915,284
Zone 3	Downham	0	0	0	0	0	0
Zone 3	Lewisham	2,464,346	300,391	6,743,519	9,508,256	8,323,074	17,831,330
Zone 3	All Other	7,416,109	2,074,520	17,935,325	27,425,955	29,705,025	57,130,980
Zone 3	Total	12,980,942	4,423,174	37,342,205	54,746,321	52,863,123	107,609,444
Out of Area	London West End	32,928,444	14,176,092	26,507,364	73,611,900		
Out of Area	London City	23,530,657	12,140,804	18,576,023	54,247,485		
Out of Area	London Bridge	11,909,782	5,816,183	11,627,285	29,353,250		
Out of Area	Canary Wharf	9,352,075	2,888,453	4,538,739	16,779,267		
Out of Area	Bluewater	10,144,594	14,443,172	4,059,798	28,647,565		
Out of Area	Catford	437,629	90,134	2,602,594	3,130,357		
Out of Area	Petts Wood	145,788	168,075	638,954	952,817		
Out of Area	Beckenham	251,780	162,053	717,232	1,131,065		
Out of Area	Brixton	202,350	100,107	348,069	650,526		
Out of Area	Downham	60,187	13,664	449,883	523,734		
Out of Area	Sidcup - Ruxley Roundabout Retail Park	216,054	434,947	152,339	803,341		
Out of Area	All Other	118,771,474	73,888,798	111,061,041	303,721,314		
Out of Area	Total	207,950,815	124,322,484	181,279,322	513,552,620		
Online Expenditure		284,020,053	143,259,971	202,840,963	630,120,987		
Total Expenditure		640,348,443	349,528,196	451,079,463	810,835,115	307,637,889	604,920,384

TABLE 6: SUMMARY OF RETAINED FOOD & BEVERAGE TURNOVER FOR GREENWICH BOROUGH INCLUDING TURNOVER INFLOW FROM OUTSIDE THE STUDY AREA (£M)

Merchant location	Retail Location	2025	2030	2035	2037
Zone 1	Abbey Wood	1,298,412	1,367,282	1,446,191	1,479,059
Zone 1	Blackheath (London)	36,360,036	38,359,516	40,648,528	41,606,627
Zone 1	Eltham	16,864,305	17,788,315	18,843,459	19,284,116
Zone 1	Greenwich East	3,805,538	4,022,087	4,265,971	4,367,432
Zone 1	Greenwich Peninsula/Charlton Riverside	18,027,670	19,029,707	20,168,091	20,642,865
Zone 1	Greenwich Village	51,445,666	54,265,765	57,500,755	58,856,016
Zone 1	Kidbrooke	933,073	985,958	1,045,581	1,070,389
Zone 1	Lee	0	0	0	0
Zone 1	North Greenwich	99,853,687	105,269,581	111,475,713	114,069,772
Zone 1	Plumstead	5,452,974	5,756,896	6,100,983	6,244,209
Zone 1	Thamesmead	8,449,427	8,914,227	9,441,563	9,660,956
Zone 1	Woolwich	12,559,044	13,268,088	14,067,781	14,400,415
Zone 1	All Other	64,963,576	68,522,423	72,592,095	74,293,290
Zone 1	Total	320,013,408	337,549,845	357,596,711	365,975,147

Source: Tables 2 to 5

TABLE 10A: GREENWICH BOROUGH - FORECAST CAPACITY FOR F&B FLOORSPACE (2025 TO 2037) EXCLUDING COMMITMENTS

		2025	2030	2035	2037
Step 1:	Total Forecast 'Current' Turnover of All Floorspace (£m):	£320.0	£338	£358	£366
Step 2:	Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£320.0	£338.0	£357.0	£364.9
Step 3:	**Net Residual Expenditure - Excluding Commitments (£m):**	-	-£0.5	£0.6	£1.1
Step 4:	**Capacity for F&B Floorspace:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£4,036	£4,263	£4,503	£4,602
	(ii) Net Floorspace Capacity (sq m):	**-**	**-107**	**130**	**232**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-153	186	332

Notes:

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

Step 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.

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

Step 4: Assumed sales density