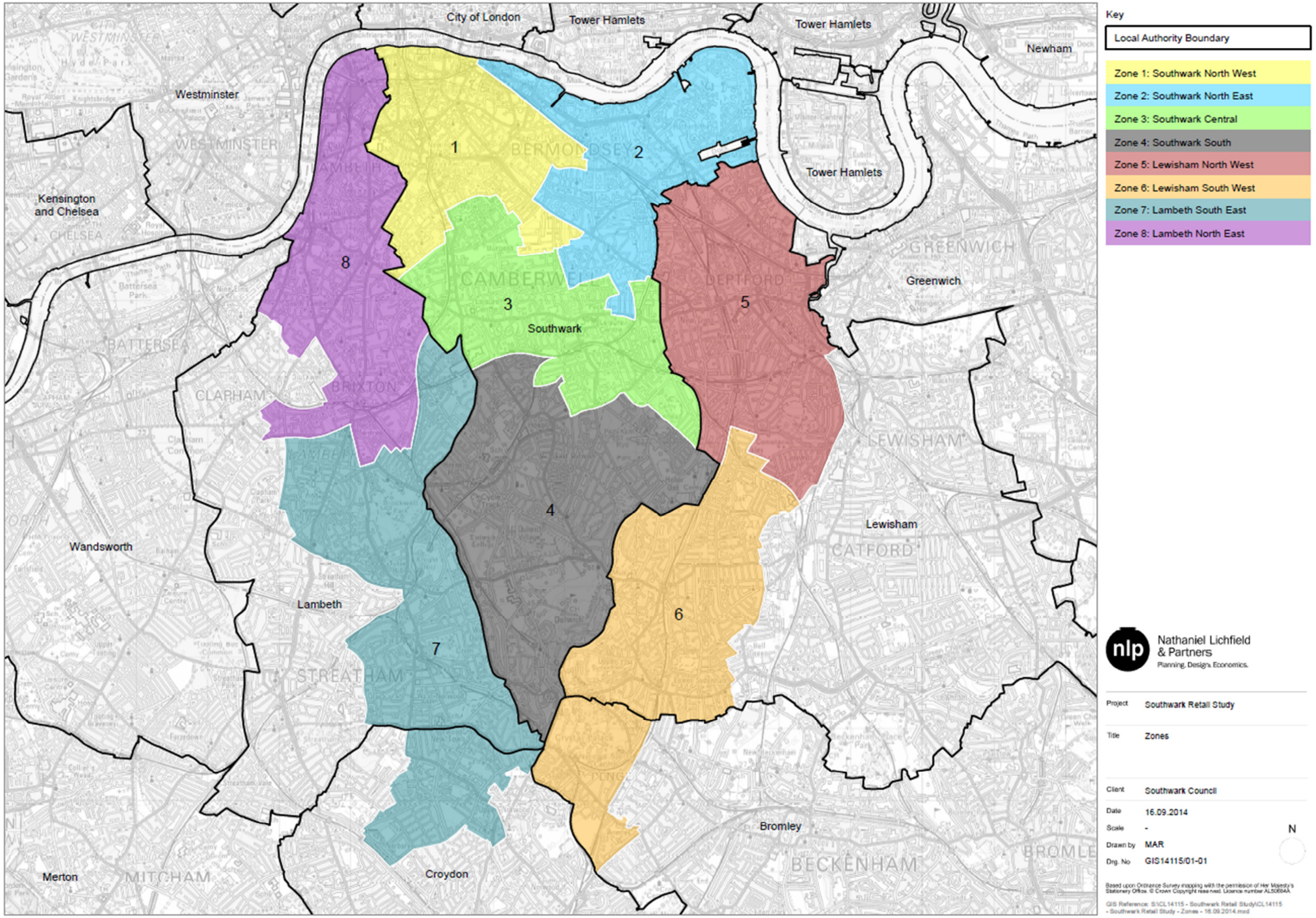
Appendix 1 Study Area and Methodology

Southwark Study Area Zones

Zone	Ward	
Zone 1: Southwark North West	Cathedrals Chaucer (Southwark) Grange (Southwark)	East Walworth Newington (Southwark)
Zone 2: Southwark North East	Riverside (Southwark) Rotherhithe Surrey Docks	South Bermondsey Livesey
Zone 3: Southwark Central	Faraday Peckham The Lane	Nunhead Camberwell B Brunswick Park (Southwark)
Zone 4: Southwark South	South Camberwell East Dulwich Village (Southwark)	College (Southwark) Peckham Rye
Zone 5: Lewisham North West	Evelyn New Cross Telegraph Hill	Brockley Ladywell
Zone 6: Lewisham South West	Crofton Park Perry Vale Forest Hill	Sydenham (Lewisham) Crystal Palace
Zone 7: Lambeth South East	Upper Norwood Gipsy Hill Knight's Hill Thurlow Park	Herne Hill Tulse Hill Brixton Hill
Zone 8: Lambeth North East	Oval Prince's Vassall Stockwell	Bishop's Fernadale (Lambeth) Coldharbour Lane (Lambeth)

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 12.1, October 2014) which is the most up to date information available.

Study Area

2 Having reviewed the previous zones used for the 2009 Study, the zones have been redrawn. The study area has been sub-divided into eight zones, based on ward boundaries, as shown above. The redrawn zones better reflect the extent of Southwark's primary catchment area. The inner catchment area (Zones 1-4) comprises the Southwark Council area.

Retail Expenditure

3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 12.1) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

5 Experian's EBS growth forecast rates for 2012 to 2016 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -1.3% for 2012-2013, -0.5% for 2013 to 2014, +0.4% for 2014 to 2015 and +0.6% for 2016; for comparison goods: +4.6% for 2012-2013, +5.6% for 2013-2014, +4.4% for 2014-2015 and +3.1% for 2016.

6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted ie. +0.6% per annum for convenience goods after 2015 and 3.3% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops eg. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2013 is:

- 7.6% of convenience goods expenditure; and
- 14.7% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2013 are:

- 2.3% of convenience goods expenditure; and
- 11.1% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 4.4% and 15.9% by 2021 respectively, and estimated at 5.6% and 15.5% by 2031. These figures have been adopted in this assessment.

10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off after 2020.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises eg. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the August 2014 household survey.

14 The total turnover of shops within Southwark is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

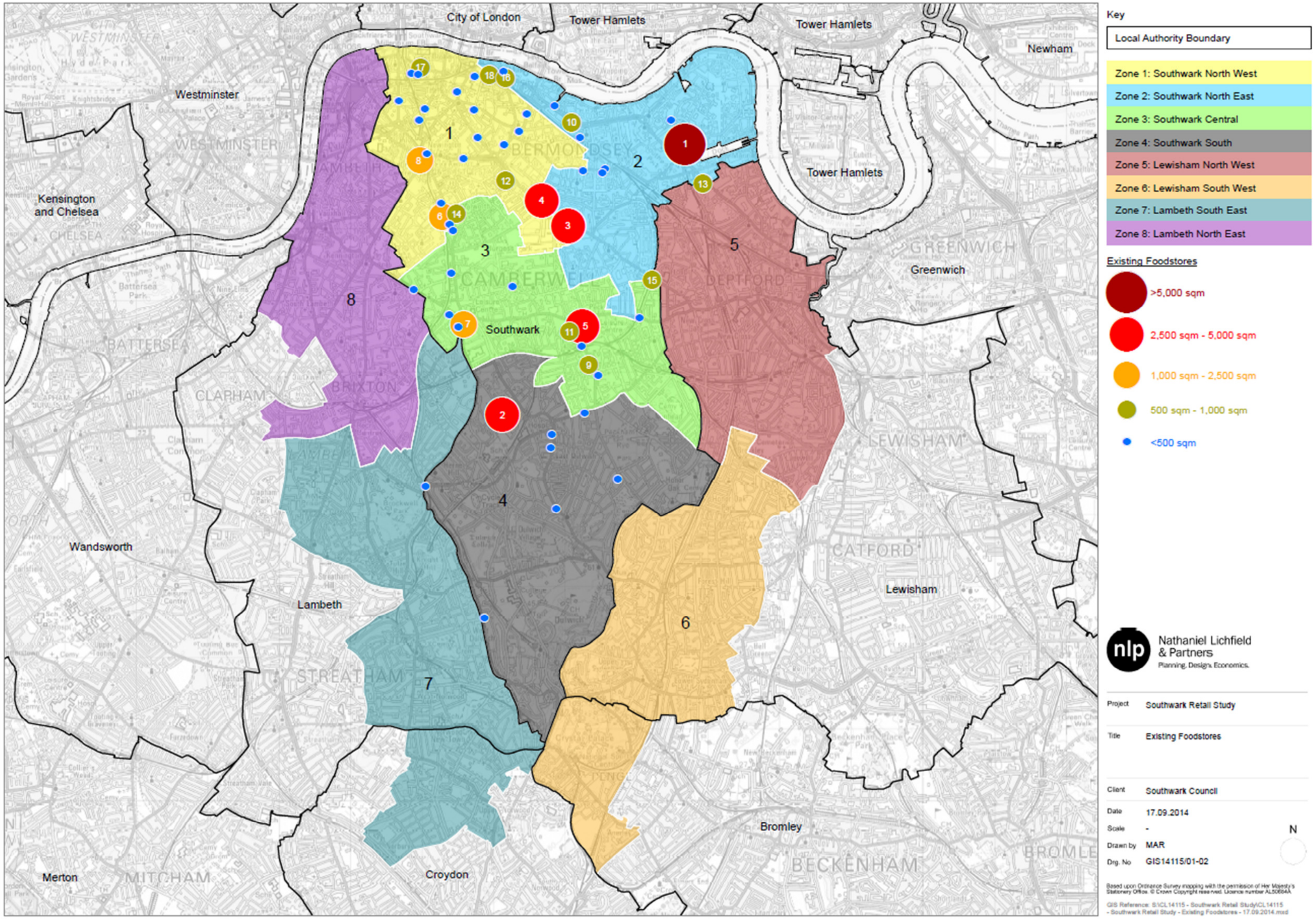
15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures. Plan 2 below shows the location of existing main food stores within Southwark.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Southwark and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £6,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across London. The total benchmark turnover of identified convenience sales floorspace within Southwark is £522.72 million (Table 6B, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Plan 2: Location of Existing Food Store Provision



Key to Plan 2:

Ref	FASCIA	STREET	POSTCODE	Net Sales (sq.m)
1	TESCO	REDRIFF ROAD	SE16 7LL	5,189
2	SAINSBURYS	DOG KENNEL HILL	SE22 8BB	4,734
3	ASDA	OLD KENT ROAD	SE1 5AG	3,885
4	TESCO	DUNTON ROAD	SE1 5HG	2,982
5	MORRISONS	RYE LANE	SE15 5EW	2,517
6	MORRISONS	WALWORTH ROAD	SE17 2TE	1,483
7	MORRISONS	DENMARK HILL	SE5 8RW	1,285
8	TESCO METRO	ELEPHANT AND CASTLE	SE1 6TB	1,173
9	ASDA SUPERMARKET	RYE LANE	SE15 4NB	953
10	TESCO METRO	JAMAICA ROAD	SE16 4BA	930
11	LIDL	BELLENDEN ROAD	SE15 5BA	890
12	LIDL	MASSINGER STREET	SE17 1TY	846
13	LIDL	BESTWOOD STREET	SE8 5AW	846
14	M&S FOODHALL	WALWORTH ROAD	SE17 2TG	799
15	ALDI	OLD KENT ROAD	SE15 1NQ	796
16	TESCO METRO	TOOLEY STREET	SE1 2TH	679
17	M&S SIMPLY FOOD	SOUTHWARK STREET	SE1 0HX	583
18	M&S SIMPLY FOOD	RAILWAY APPROACH	SE1 9SP	583
	CO OP - FOODSTORE	SOUTHWARK BRIDGE ROAD	SE1 0DG	199
	CO OP - FOODSTORE	MILL STREET	SE1 2DF	137
	CO OP - FOODSTORE	TOWER BRIDGE ROAD	SE1 3LS	102
	CO OP - FOODSTORE	GREAT DOVER STREET	SE1 4GZ	214
	CO OP - FOODSTORE	SOUTHWARK PARK ROAD	SE16 3TS	279
	CO OP - FOODSTORE	SPA ROAD	SE16 4AS	442
	CO OP - FOODSTORE	FOREST HILL ROAD	SE22 0RR	135
	CO OP - FOODSTORE	LORDSHIP LANE	SE22 8HJ	473
	CO OP - FOODSTORE	CAMBERWELL NEW ROAD	SE5 0TJ	322
	CO OP - FOODSTORE	DENMARK HILL	SE5 8RZ	469
	ICELAND	ELEPHANT AND CASTLE	SE1 6TB	397
	ICELAND	RYE LANE	SE15 5DQ	463
	ICELAND	SOUTHWARK PARK ROAD	SE16 3RW	490
	ICELAND	WALWORTH ROAD	SE17 2NA	482
	ICELAND	LORDSHIP LANE	SE22 8HF	287
	ICELAND	CAMBERWELL ROAD	SE5 0EE	452
	M&S SIMPLY FOOD	MORE LONDON PLACE	SE1 2DA	278
	SAINSBURYS LOCAL	GREAT SUFFOLK STREET	SE1 0UG	187
	SAINSBURYS LOCAL	BOROUGH HIGH STREET	SE1 1LB	268
	SAINSBURYS LOCAL	BERMONDSEY SQUARE	SE1 3UN	214
	SAINSBURYS LOCAL	BLACKFRIARS ROAD	SE1 8EZ	187
	SAINSBURYS LOCAL	GREAT MAZE POND	SE1 9RT	187
	SAINSBURYS LOCAL	LORDSHIP LANE	SE22 8JJ	230
	SAINSBURYS LOCAL	SURREY QUAYS ROAD	SE16 7ED	187
	SAINSBURYS LOCAL	HERNE HILL	SE24 9QH	214
	TESCO EXPRESS	BOROUGH ROAD	SE1 0AJ	184
	TESCO EXPRESS	GREAT SUFFOLK STREET	SE1 0NZ	157
	TESCO EXPRESS	NEW KENT ROAD	SE1 4AG	219
	TESCO EXPRESS	LONG LANE	SE1 4AU	237
	TESCO EXPRESS	QUEENS ROAD	SE15 2ND	222
	TESCO EXPRESS	RYE LANE	SE15 4UR	165
	TESCO EXPRESS	SOUTHWARK PARK ROAD	SE16 3RP	412
	TESCO EXPRESS	WALWORTH ROAD	SE17 1JE	310
	TESCO EXPRESS	WALWORTH ROAD	SE17 2NF	319
	TESCO EXPRESS	EAST DULWICH ROAD	SE22 9BD	229
	TESCO EXPRESS	CAMBERWELL NEW ROAD	SE5 0RW	157
	TESCO EXPRESS	SOUTHAMPTON WAY	SE5 7EJ	277
	TESCO EXPRESS	TOWER BRIDGE ROAD	SE1 4TL	241
	TESCO EXPRESS	CROXTED ROAD	SE21 8SZ	205

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population – Baseline Projections

Zone	2011	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	71,317	78,072	81,182	86,015	90,566	92,762
Zone 2 - Southwark North East	69,747	74,564	77,308	81,658	83,258	86,000
Zone 3 - Southwark Central	85,282	87,070	88,648	92,158	94,940	96,684
Zone 4 - Southwark South	63,002	62,979	63,319	63,784	64,708	66,883
Zone 5 - Lewisham North West	80,858	86,012	89,425	97,528	103,644	108,609
Zone 6 - Lewisham South West	73,736	75,476	76,335	77,346	78,776	80,119
Zone 7 - Lambeth South East	105,477	107,704	109,095	111,121	112,909	116,028
Zone 8 - Lambeth North East	100,307	106,826	110,915	119,208	123,436	126,735
Total	**649,726**	**678,703**	**696,227**	**728,818**	**752,237**	**773,820**

Source: GLA 2013 Round of Demographic Projections – Trend-based ward projections

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	1,578	1,584	1,611	1,649	1,688
Zone 2 - Southwark North East	1,705	1,712	1,740	1,782	1,824
Zone 3 - Southwark Central	1,552	1,558	1,584	1,622	1,661
Zone 4 - Southwark South	1,904	1,912	1,943	1,990	2,037
Zone 5 - Lewisham North West	1,763	1,770	1,799	1,842	1,886
Zone 6 - Lewisham South West	1,805	1,812	1,842	1,886	1,931
Zone 7 - Lambeth South East	1,845	1,852	1,883	1,928	1,974
Zone 8 - Lambeth North East	1,804	1,811	1,841	1,885	1,930

Sources:
Experian Local Expenditure 2012 (2012 prices)
Growth Rates: -1.3% 2012-2013, -0.5% 2013-2014, 0.5% 2014-2015, 0.4% 2015-2016 and 0.6% p.a. from 2016
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	123.22	128.62	138.53	149.35	156.62
Zone 2 - Southwark North East	127.17	132.35	142.11	148.36	156.90
Zone 3 - Southwark Central	135.17	138.15	146.00	154.00	160.57
Zone 4 - Southwark South	119.94	121.05	123.96	128.76	136.26
Zone 5 - Lewisham North West	151.63	158.25	175.45	190.90	204.82
Zone 6 - Lewisham South West	136.23	138.31	142.46	148.56	154.70
Zone 7 - Lambeth South East	198.73	202.07	209.23	217.67	229.02
Zone 8 - Lambeth North East	192.72	200.86	219.45	232.66	244.58
Total	**1,184.81**	**1,219.67**	**1,297.18**	**1,370.26**	**1,443.47**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Tesco Metro, Elephant & Castle	10.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.9%	15.0%
Morrisons, Walworth Road	18.1%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	1.6%	15.0%
Other Main Food Stores in Zone 1	9.6%	0.2%	3.4%	0.0%	0.3%	0.2%	0.3%	2.3%	15.0%
Other Local Shops Zone 1	13.1%	4.5%	3.6%	0.7%	0.0%	0.2%	0.0%	1.4%	5.0%
Zone 1 Sub-Total	**50.9%**	**4.7%**	**12.5%**	**0.7%**	**0.3%**	**0.4%**	**0.3%**	**6.2%**	
Zone 2 - Southwark North East									
Tesco, Redriffe Road, Surrey Quays	1.9%	26.4%	1.2%	0.5%	5.4%	0.1%	0.0%	0.6%	15.0%
Asda, Old Kent Road	5.2%	11.3%	13.1%	10.2%	8.4%	2.3%	0.0%	4.8%	10.0%
Tesco, Dunton Road/Old Kent Road	11.0%	5.0%	5.3%	0.3%	4.0%	0.2%	0.2%	0.9%	10.0%
Other Main Food Stores in Zone 2	3.5%	19.3%	5.7%	0.6%	5.7%	0.1%	0.2%	1.3%	5.0%
Other Local Shops Zone 2	11.1%	7.4%	0.0%	0.0%	1.8%	0.2%	0.8%	0.8%	5.0%
Zone 2 Sub-Total	**32.7%**	**69.4%**	**25.3%**	**11.6%**	**25.3%**	**2.9%**	**1.2%**	**8.4%**	
Zone 3 - Southwark Central									
Asda, Rye Lane, Peckham	0.0%	1.2%	5.5%	1.1%	0.0%	0.0%	0.0%	0.2%	5.0%
Morrisons, Rye Lane, Peckham	0.2%	3.3%	14.3%	11.5%	0.6%	0.5%	2.0%	0.3%	5.0%
Morrisons, Denmark Hill	2.6%	0.0%	4.3%	0.5%	0.0%	0.0%	1.2%	2.1%	5.0%
Other Main Food Stores in Zone 3	0.0%	2.9%	11.9%	1.6%	0.0%	0.9%	0.3%	0.6%	5.0%
Other Local Shops Zone 3	1.4%	3.7%	7.1%	0.1%	2.7%	4.1%	0.3%	4.7%	5.0%
Zone 3 Sub-Total	**4.2%**	**11.1%**	**43.1%**	**14.8%**	**3.3%**	**5.5%**	**3.8%**	**7.9%**	
Zone 4 - Southwark South									
Sainsbury's, Dog Kennel Hill	0.4%	0.1%	7.4%	26.0%	3.0%	0.3%	3.4%	3.1%	5.0%
Other Main Food Stores in Zone 4	0.3%	0.0%	1.0%	16.0%	4.6%	0.0%	1.5%	0.0%	5.0%
Other Local Shops Zone 4	0.0%	0.1%	0.4%	11.2%	0.2%	0.1%	3.6%	0.8%	5.0%
Zone 4 Sub-Total	**0.7%**	**0.2%**	**8.8%**	**53.2%**	**7.8%**	**0.4%**	**8.5%**	**3.9%**	
LB Southwark Total	**88.5%**	**85.4%**	**89.7%**	**80.3%**	**36.7%**	**9.2%**	**13.8%**	**26.4%**	
Stores in LB Lambeth	7.4%	0.0%	2.7%	3.9%	3.0%	0.3%	51.2%	54.1%	60.0%
Stores in LB Lewisham	0.2%	4.3%	1.7%	12.2%	50.3%	66.8%	15.9%	0.0%	50.0%
Stores in LB Croydon	0.0%	0.0%	0.6%	0.0%	0.2%	0.4%	5.0%	1.0%	90.0%
Stores in LB Bromley	0.2%	0.0%	0.1%	2.1%	0.9%	17.8%	3.1%	0.2%	90.0%
Stores in RB Greenwich	0.7%	1.7%	0.0%	0.0%	5.3%	0.5%	0.2%	0.0%	95.0%
Other Outside	3.0%	8.6%	5.2%	1.5%	3.6%	5.0%	10.8%	18.3%	90.0%
Total Outside LB Southwark	**11.5%**	**14.6%**	**10.3%**	**19.7%**	**63.3%**	**90.8%**	**86.2%**	**73.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey August 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	**123.22**	**127.17**	**135.17**	**119.94**	**151.63**	**136.23**	**198.73**	**192.72**		**1,184.81**
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	12.45	0.00	1.08	0.00	0.00	0.00	0.00	1.73	2.69	17.95
Morrisons, Walworth Road	22.30	0.00	6.35	0.00	0.00	0.00	0.00	3.08	5.60	37.34
Other Main Food Stores in Zone 1	11.83	0.25	4.60	0.00	0.45	0.27	0.60	4.43	3.96	26.39
Other Local Shops Zone 1	16.14	5.72	4.87	0.84	0.00	0.27	0.00	2.70	1.61	32.15
Zone 1 Sub-Total	**62.72**	**5.98**	**16.90**	**0.84**	**0.45**	**0.54**	**0.60**	**11.95**	**13.86**	**113.84**
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	2.34	33.57	1.62	0.60	8.19	0.14	0.00	1.16	8.40	56.02
Asda, Old Kent Road	6.41	14.37	17.71	12.23	12.74	3.13	0.00	9.25	8.43	84.27
Tesco, Dunton Road/Old Kent Road	13.55	6.36	7.16	0.36	6.07	0.27	0.40	1.73	3.99	39.90
Other Main Food Stores in Zone 2	4.31	24.54	7.70	0.72	8.64	0.14	0.40	2.51	2.58	51.54
Other Local Shops Zone 2	13.68	9.41	0.00	0.00	2.73	0.27	1.59	1.54	1.54	30.76
Zone 2 Sub-Total	**40.29**	**88.25**	**34.20**	**13.91**	**38.36**	**3.95**	**2.38**	**16.19**	**24.93**	**262.48**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.53	7.43	1.32	0.00	0.00	0.00	0.39	0.56	11.23
Morrisons, Rye Lane, Peckham	0.25	4.20	19.33	13.79	0.91	0.68	3.97	0.58	2.30	46.01
Morrisons, Denmark Hill	3.20	0.00	5.81	0.60	0.00	0.00	2.38	4.05	0.84	16.89
Other Main Food Stores in Zone 3	0.00	3.69	16.09	1.92	0.00	1.23	0.60	1.16	1.30	25.97
Other Local Shops Zone 3	1.73	4.71	9.60	0.12	4.09	5.59	0.60	9.06	1.87	37.35
Zone 3 Sub-Total	**5.18**	**14.12**	**58.26**	**17.75**	**5.00**	**7.49**	**7.55**	**15.22**	**6.87**	**137.45**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.49	0.13	10.00	31.18	4.55	0.41	6.76	5.97	3.13	62.63
Other Main Food Stores in Zone 4	0.37	0.00	1.35	19.19	6.97	0.00	2.98	0.00	1.62	32.49
Other Local Shops Zone 4	0.00	0.13	0.54	13.43	0.30	0.14	7.15	1.54	1.22	24.46
Zone 4 Sub-Total	**0.86**	**0.25**	**11.90**	**63.81**	**11.83**	**0.54**	**16.89**	**7.52**	**5.98**	**119.58**
LB Southwark Total	**109.05**	**108.60**	**121.25**	**96.31**	**55.65**	**12.53**	**27.42**	**50.88**	**51.65**	**633.34**
Stores in LB Lambeth	9.12	0.00	3.65	4.68	4.55	0.41	101.75	104.26	342.62	571.03
Stores in LB Lewisham	0.25	5.47	2.30	14.63	76.27	91.00	31.60	0.00	221.52	443.03
Stores in LB Croydon	0.00	0.00	0.81	0.00	0.30	0.54	9.94	1.93	121.71	135.23
Stores in LB Bromley	0.25	0.00	0.14	2.52	1.36	24.25	6.16	0.39	315.54	350.60
Stores in RB Greenwich	0.86	2.16	0.00	0.00	8.04	0.68	0.40	0.00	230.65	242.79
Other Outside	3.70	10.94	7.03	1.80	5.46	6.81	21.46	35.27	832.15	924.61
Total Outside LB Southwark	**14.17**	**18.57**	**13.92**	**23.63**	**95.98**	**123.70**	**171.31**	**141.84**	**2,064.18**	**2,667.30**
TOTAL	**123.22**	**127.17**	**135.17**	**119.94**	**151.63**	**136.23**	**198.73**	**192.72**	**2,115.83**	**3,300.64**

Source: Tables 3 and 4

Table 6A: Convenience Goods Floorspace and Benchmark Turnover 2014 – Zones 1 and 2

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1	Iceland, Elephant & Castle	397	95%	377	£7,295	£2.75
Southwark North West	Tesco Metro, Elephant & Castle	1,173	90%	1,056	£11,080	£11.70
	Other Elephant & Castle	812	100%	812	£6,000	£4.87
	Iceland, Walworth Road	482	95%	458	£7,295	£3.34
	Marks & Spencer, Walworth Road	799	95%	759	£11,253	£8.54
	Morrisons, Walworth Road	1,483	85%	1,261	£12,649	£15.94
	Tesco Express, Walworth Road	310	95%	295	£11,080	£3.26
	Other Walworth Road	3,941	100%	3,941	£6,000	£23.65
	Marks & Spencer, Southwark Street	583	95%	554	£11,253	£6.23
	Sainsbury's Local, Blackfriars Road	187	95%	178	£13,619	£2.42
	Sainsbury's Local, Borough High Street	268	95%	255	£13,619	£3.47
	Sainsbury's Local, Great Suffolk Street	187	95%	178	£13,619	£2.42
	Tesco Express, Borough Road	184	95%	175	£11,080	£1.94
	Tesco Express, Great Suffolk Street	157	95%	149	£11,080	£1.65
	Other Borough High Street/Bankside	2,772	100%	2,772	£6,000	£16.63
	Co-op, Great Dover Street, Southwark	214	95%	203	£7,661	£1.56
	Co-op, Southwark Bridge Road, Southwark	199	95%	189	£7,661	£1.45
	Co-op, Tower Bridge Road, Southwark	102	95%	97	£7,661	£0.74
	Lidl, Massinger Street, Southwark	846	85%	719	£3,138	£2.26
	Sainsbury's Local, Bermondsey Square, Southwark	214	95%	203	£13,619	£2.77
	Tesco Express, Long Lane, Southwark	237	95%	225	£11,080	£2.49
	Tesco Express, New Kent Road, Southwark	219	95%	208	£11,080	£2.31
	Tesco Express, Tower Bridge Road, Southwark	241	95%	229	£11,080	£2.54
	Other Tower Bridge Road, Southwark	560	100%	560	£6,000	£3.36
	Tesco Express, Walworth Road	319	95%	303	£11,080	£3.36
	Zone 1 Sub- Total	**16,886**		**16,154**		**£131.64**
Zone 2	Aldi, Old Kent Road	796	85%	677	£8,116	£5.49
Southwark North East	Asda, Old Kent Road	3,885	70%	2,720	£13,418	£36.49
	Tesco, Dunton Road/Old Kent Road	2,982	75%	2,237	£11,080	£24.78
	Marks & Spencer, More London	278	95%	264	£11,253	£2.97
	Marks & Spencer, London Bridge Station	583	95%	554	£11,253	£6.23
	Tesco Metro, Tooley Street	679	95%	645	£11,080	£7.15
	Sainsbury's Local, Great Maze Pond	187	95%	178	£13,619	£2.42
	Other London Bridge	721	100%	721	£6,000	£4.33
	Tesco, Redriffe Road, Surrey Quays	5,189	70%	3,632	£11,080	£40.25
	Sainsbury's Local, Surrey Quays Road	187	95%	178	£13,619	£2.42
	Lidl, Bestwood Street	846	85%	719	£3,138	£2.26
	Other Surrey Quays	679	100%	679	£6,000	£4.07
	Co-op, Southwark Park Road, The Blue	279	95%	265	£7,661	£2.03
	Iceland, Southwark Park Road, The Blue	490	95%	466	£7,295	£3.40
	Tesco Express, Southwark Park Road, The Blue	412	95%	391	£11,080	£4.34
	Other The Blue	742	100%	742	£6,000	£4.45
	Co-op, Mill Street, Southwark	137	95%	130	£7,661	£1.00
	Co-op, Spa Road, Southwark	442	95%	420	£7,661	£3.22
	Tesco Metro, Jamaica Road, Southwark	930	90%	837	£11,080	£9.27
	Zone 2 Sub- Total	**20,444**		**16,453**		**£166.56**

Table 6B: Convenience Goods Floorspace and Benchmark Turnover 2014 – Zones 3 and 4

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 3	Asda, Rye Lane, Peckham	953	90%	858	£13,418	£11.51
Southwark Central	Iceland, Rye Lane, Peckham	463	95%	440	£7,295	£3.21
	Lidl, Bellenden Road, Peckham	890	85%	757	£3,138	£2.37
	Morrisons, Rye Lane, Peckham	2,517	85%	2,139	£12,649	£27.06
	Tesco Express, Queens Road, Peckham	222	95%	211	£11,080	£2.34
	Tesco Express, Rye Lane, Peckham	165	95%	157	£11,080	£1.74
	Other Peckham	9,051	100%	9,051	£6,000	£54.31
	Co-op, Denmark Hill	469	95%	446	£7,661	£3.41
	Iceland, Camberwell Road	452	95%	429	£7,295	£3.13
	Morrisons, Denmark Hill	1,285	85%	1,092	£12,649	£13.82
	Tesco Express, Camberwell New Road	157	95%	149	£11,080	£1.65
	Other Camberwell	2,121	100%	2,121	£6,000	£12.73
	Other Nunhead	780	100%	780	£6,000	£4.68
	Co-op, Camberwell New Road, Camberwell	322	95%	306	£7,661	£2.34
	Tesco Express, Southampton Way, Southwark	277	95%	263	£11,080	£2.92
	Zone 3 Sub- Total	**20,124**		**19,199**		**£147.21**
Zone 4	Co-op, Lordship Lane	473	95%	449	£7,661	£3.44
Southwark South	Iceland, Lordship Lane	287	95%	273	£7,295	£1.99
	Sainsbury's Local, Lordship Lane	230	95%	219	£13,619	£2.98
	Other Lordship Lane	1,729	100%	1,729	£6,000	£10.37
	Other Dulwich Village	325	100%	325	£6,000	£1.95
	Sainsbury's, Dog Kennel Hill	4,734	70%	3,314	£13,619	£45.13
	Sainsbury's Local, Herne Hill	214	95%	203	£13,619	£2.77
	Other Herne Hill	520	100%	520	£6,000	£3.12
	Co-op, Forest Hill Road, Dulwich	135	95%	128	£7,661	£0.98
	Tesco Express, Croxted Road, Dulwich	205	95%	195	£11,080	£2.16
	Tesco Express, East Dulwich Road, Dulwich	229	95%	218	£11,080	£2.41
	Zone 4 Sub- Total	**9,081**		**7,572**		**£77.30**
LB Southwark Total		**66,535**		**59,378**		**£522.72**

Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 7: Convenience Goods Expenditure 2016 (£m) – without commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**128.62**	**132.35**	**138.15**	**121.05**	**158.25**	**138.31**	**202.07**	**200.86**		**1,219.67**
Zone 1 - Southwark North West										
Tesco Metro, Elephant & Castle	12.99	0.00	1.11	0.00	0.00	0.00	0.00	1.81	2.81	18.71
Morrisons, Walworth Road	23.28	0.00	6.49	0.00	0.00	0.00	0.00	3.21	5.82	38.81
Other Main Food Stores in Zone 1	12.35	0.26	4.70	0.00	0.47	0.28	0.61	4.62	4.11	27.40
Other Local Shops Zone 1	16.85	5.96	4.97	0.85	0.00	0.28	0.00	2.81	1.67	33.38
Zone 1 Sub-Total	**65.47**	**6.22**	**17.27**	**0.85**	**0.47**	**0.55**	**0.61**	**12.45**	**14.41**	**118.30**
Zone 2 - Southwark North East										
Tesco, Redriffe Road, Surrey Quays	2.44	34.94	1.66	0.61	8.55	0.14	0.00	1.21	8.74	58.28
Asda, Old Kent Road	6.69	14.96	18.10	12.35	13.29	3.18	0.00	9.64	8.69	86.89
Tesco, Dunton Road/Old Kent Road	14.15	6.62	7.32	0.36	6.33	0.28	0.40	1.81	4.14	41.41
Other Main Food Stores in Zone 2	4.50	25.54	7.87	0.73	9.02	0.14	0.40	2.61	2.67	53.50
Other Local Shops Zone 2	14.28	9.79	0.00	0.00	2.85	0.28	1.62	1.61	1.60	32.02
Zone 2 Sub-Total	**42.06**	**91.85**	**34.95**	**14.04**	**40.04**	**4.01**	**2.42**	**16.87**	**25.85**	**272.10**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.59	7.60	1.33	0.00	0.00	0.00	0.40	0.57	11.49
Morrisons, Rye Lane, Peckham	0.26	4.37	19.76	13.92	0.95	0.69	4.04	0.60	2.35	46.93
Morrisons, Denmark Hill	3.34	0.00	5.94	0.61	0.00	0.00	2.42	4.22	0.87	17.40
Other Main Food Stores in Zone 3	0.00	3.84	16.44	1.94	0.00	1.24	0.61	1.21	1.33	26.60
Other Local Shops Zone 3	1.80	4.90	9.81	0.12	4.27	5.67	0.61	9.44	1.93	38.55
Zone 3 Sub-Total	**5.40**	**14.69**	**59.54**	**17.92**	**5.22**	**7.61**	**7.68**	**15.87**	**7.05**	**140.98**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.51	0.13	10.22	31.47	4.75	0.41	6.87	6.23	3.19	63.79
Other Main Food Stores in Zone 4	0.39	0.00	1.38	19.37	7.28	0.00	3.03	0.00	1.66	33.10
Other Local Shops Zone 4	0.00	0.13	0.55	13.56	0.32	0.14	7.27	1.61	1.24	24.82
Zone 4 Sub-Total	**0.90**	**0.26**	**12.16**	**64.40**	**12.34**	**0.55**	**17.18**	**7.83**	**6.09**	**121.71**
LB Southwark Total	**113.83**	**113.03**	**123.92**	**97.20**	**58.08**	**12.72**	**27.89**	**53.03**	**53.39**	**653.09**
Stores in LB Lambeth	9.52	0.00	3.73	4.72	4.75	0.41	103.46	108.67	352.89	588.14
Stores in LB Lewisham	0.26	5.69	2.35	14.77	79.60	92.39	32.13	0.00	227.19	454.37
Stores in LB Croydon	0.00	0.00	0.83	0.00	0.32	0.55	10.10	2.01	124.30	138.11
Stores in LB Bromley	0.26	0.00	0.14	2.54	1.42	24.62	6.26	0.40	320.82	356.47
Stores in RB Greenwich	0.90	2.25	0.00	0.00	8.39	0.69	0.40	0.00	240.03	252.67
Other Outside	3.86	11.38	7.18	1.82	5.70	6.92	21.82	36.76	858.91	954.34
Total Outside LB Southwark	**14.79**	**19.32**	**14.23**	**23.85**	**100.17**	**125.59**	**174.18**	**147.83**	**2,124.14**	**2,744.11**
TOTAL	**128.62**	**132.35**	**138.15**	**121.05**	**158.25**	**138.31**	**202.07**	**200.86**	**2,177.53**	**3,397.20**

Source: Tables 3 and 4

Table 8: Convenience Goods Commitments Floorspace

Centre	Additional Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1 - Southwark North West		
The Heygate Estate (1)	3,500	2,450
Century House, Tanner Street (2)	1,840	1,288
King's Reach Tower, Stamford Street (3)	740	518
Brandon House, Borough High Street (4)	365	256
One Blackfriars, Blackfriars Road (5)	263	184
Sea Containers House, Upper Ground (6)	256	179
127 Borough High Street (7)	96	67
90-91 & 92 Blackfriars Road (8)	316	221
Former Elephant & Castle Swimming Pool (9)	388	272
4-10 Lamb Walk (10)	218	153
Castle Industrial Estate (11)	1,500	1,050
Eileen House (12)	144	101
Zone 1 - Sub-Total	**9,626**	**6,738**
Zone 2 - Southwark North East		
Surrey Quays Shopping Centre Extension (13)	1,069	748
Zone 2 - Sub-Total	**1,069**	**748**
LB Southwark Total	**10,695**	**7,487**

(1) DP9 Retail Assessment assumed floorspace breakdown
(2) Planning Application - 3,680 sq.m gross A1 (assume 50% A1 convenience)
(3) Planning Application - 3,701 sq.m gross increase A1 to A5 (assume 20% A1 convenience)
(4) Planning Application - 1,460 sq.m gross increase A1/B1 (assume 25% A1 convenience)
(5) Planning Application - 1,316 sq.m gross increase A1 to A5 (assume 20% A1 convenience)
(6) Planning Application - 1,281 sq.m gross increase A1 to A3 (assume 20% A1 convenience)
(7) Planning Application - 482 sq.m gross increase A1 to A3 (assume 20% A1 convenience)
(8) Planning Application - 633 sq.m gross A1 (assume 50% A1 convenience)
(9) Planning Application - 776 sq.m gross A1 (assume 50% A1 convenience)
(10) Planning Application - 873 sq.m gross increase A1 to A5/B1/D1 (assume 25% A1 convenience)
(11) Planning Application - Food store of 1,500 sq.m gross
(12) Planning Application - 287 sq.m gross A1 (assume 50% convenience)
(13) 10,691 sq.m gross increase A1 to A5 (assume 10% A1 convenience)

Table 9: Turnover and Trade Draw of Commitments at 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	60.0%	6.0%	16.0%	1.0%	0.0%	0.0%	1.0%	11.0%	5.0%	100.0%
Zone 2 - Commitments Trade Draw %	16.0%	35.0%	13.0%	5.0%	16.0%	2.0%	1.0%	7.0%	5.0%	100.0%
Zone 1 - Commitments Turnover £m	52.56	5.26	14.02	0.88	0.00	0.00	0.88	9.64	4.38	87.60
Zone 2 - Commitments Turnover £m	1.56	3.40	1.26	0.49	1.56	0.19	0.10	0.68	0.49	9.73

Source: NEMS Household Survey August 2014

Turnover of commitments at £13,000 per sq.m net

Table 10: Convenience Goods Expenditure 2016 (£m) - with commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**128.62**	**132.35**	**138.15**	**121.05**	**158.25**	**138.31**	**202.07**	**200.86**		**1,219.67**
Zone 1 - Southwark North West										
Commitments Zone 1	52.56	5.26	14.02	0.88	0.00	0.00	0.88	9.64	4.38	87.60
Tesco Metro, Elephant & Castle	7.86	0.00	1.11	0.00	0.00	0.00	0.00	1.81	2.81	13.58
Morrisons, Walworth Road	7.96	0.00	5.04	0.00	0.00	0.00	0.00	2.89	5.78	21.66
Other Main Food Stores in Zone 1	5.85	0.24	3.86	0.00	0.47	0.28	0.60	4.24	4.08	19.61
Other Local Shops Zone 1	10.19	5.51	4.31	0.84	0.00	0.28	0.00	2.64	1.66	25.42
Zone 1 Sub-Total	**84.42**	**11.00**	**28.33**	**1.71**	**0.47**	**0.55**	**1.48**	**21.21**	**18.71**	**167.87**
Zone 2 - Southwark North East										
Commitments Zone 2	1.56	3.40	1.26	0.49	1.56	0.19	0.10	0.68	0.49	9.73
Tesco, Redriffe Road, Surrey Quays	1.16	31.43	1.36	0.59	8.39	0.14	0.00	1.11	8.69	52.86
Asda, Old Kent Road	4.05	13.83	15.67	12.18	13.11	3.17	0.00	9.05	8.65	79.72
Tesco, Dunton Road/Old Kent Road	8.56	6.12	6.34	0.36	6.25	0.28	0.40	1.70	4.12	34.12
Other Main Food Stores in Zone 2	3.32	24.26	7.17	0.72	8.94	0.14	0.40	2.50	2.67	50.12
Other Local Shops Zone 2	10.52	9.30	0.00	0.00	2.82	0.28	1.61	1.54	1.60	27.67
Zone 2 Sub-Total	**29.16**	**88.34**	**31.81**	**14.34**	**41.07**	**4.20**	**2.51**	**16.58**	**26.21**	**254.22**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.51	6.92	1.32	0.00	0.00	0.00	0.39	0.57	10.71
Morrisons, Rye Lane, Peckham	0.19	4.15	17.99	13.80	0.94	0.69	4.02	0.58	2.34	44.70
Morrisons, Denmark Hill	2.46	0.00	5.41	0.60	0.00	0.00	2.41	4.05	0.87	15.80
Other Main Food Stores in Zone 3	0.00	3.65	14.97	1.92	0.00	1.24	0.60	1.16	1.33	24.87
Other Local Shops Zone 3	1.56	4.77	9.37	0.12	4.25	5.67	0.60	9.25	1.92	37.53
Zone 3 Sub-Total	**4.22**	**14.08**	**54.67**	**17.76**	**5.19**	**7.60**	**7.65**	**15.41**	**7.03**	**133.60**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.24	0.12	8.40	30.91	4.66	0.41	6.81	5.72	3.17	60.45
Other Main Food Stores in Zone 4	0.28	0.00	1.26	19.20	7.21	0.00	3.02	0.00	1.65	32.62
Other Local Shops Zone 4	0.00	0.13	0.53	13.50	0.32	0.14	7.26	1.57	1.24	24.68
Zone 4 Sub-Total	**0.53**	**0.25**	**10.18**	**63.61**	**12.19**	**0.55**	**17.09**	**7.29**	**6.06**	**117.75**
LB Southwark Total	**118.32**	**113.66**	**124.99**	**97.42**	**58.92**	**12.90**	**28.73**	**60.49**	**58.01**	**673.44**
Stores in LB Lambeth	5.76	0.00	3.23	4.66	4.68	0.41	102.83	102.00	351.28	574.86
Stores in LB Lewisham	0.19	5.40	2.14	14.64	78.89	92.24	32.00	0.00	226.50	452.00
Stores in LB Croydon	0.00	0.00	0.79	0.00	0.32	0.55	10.08	1.97	124.11	137.82
Stores in LB Bromley	0.22	0.00	0.13	2.53	1.42	24.60	6.25	0.39	320.34	355.89
Stores in RB Greenwich	0.78	2.19	0.00	0.00	8.35	0.69	0.40	0.00	239.67	252.09
Other Outside	3.35	11.10	6.86	1.81	5.67	6.91	21.78	36.01	857.61	951.10
Total Outside LB Southwark	**10.30**	**18.69**	**13.16**	**23.63**	**99.33**	**125.41**	**173.34**	**140.37**	**2,119.52**	**2,723.75**
TOTAL	**128.62**	**132.35**	**138.15**	**121.05**	**158.25**	**138.31**	**202.07**	**200.86**	**2,177.53**	**3,397.20**

Source: Table 3 and 7

Table 11: Convenience Goods Expenditure 2021 (£m) - with commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	**138.53**	**142.11**	**146.00**	**123.96**	**175.45**	**142.46**	**209.23**	**219.45**		**1,297.18**
Zone 1 - Southwark North West										
Commitments Zone 1	56.61	5.64	14.81	0.90	0.00	0.00	0.91	10.53	4.66	94.05
Tesco Metro, Elephant & Castle	8.47	0.00	1.17	0.00	0.00	0.00	0.00	1.98	2.98	14.59
Morrisons, Walworth Road	8.57	0.00	5.33	0.00	0.00	0.00	0.00	3.15	6.14	23.20
Other Main Food Stores in Zone 1	6.30	0.26	4.08	0.00	0.52	0.28	0.62	4.63	4.34	21.03
Other Local Shops Zone 1	10.98	5.91	4.55	0.86	0.00	0.28	0.00	2.88	1.77	27.24
Zone 1 Sub-Total	**90.92**	**11.81**	**29.94**	**1.75**	**0.52**	**0.57**	**1.53**	**23.17**	**19.90**	**180.11**
Zone 2 - Southwark North East										
Commitments Zone 2	1.68	3.66	1.34	0.50	1.73	0.20	0.10	0.74	0.52	10.45
Tesco, Redriffe Road, Surrey Quays	1.25	33.74	1.44	0.61	9.30	0.14	0.00	1.21	9.24	56.93
Asda, Old Kent Road	4.36	14.85	16.56	12.48	14.54	3.27	0.00	9.89	9.20	85.14
Tesco, Dunton Road/Old Kent Road	9.22	6.57	6.70	0.37	6.92	0.28	0.42	1.85	4.38	36.72
Other Main Food Stores in Zone 2	3.57	26.05	7.58	0.74	9.91	0.14	0.42	2.74	2.84	53.98
Other Local Shops Zone 2	11.33	9.99	0.00	0.00	3.13	0.28	1.67	1.68	1.70	29.78
Zone 2 Sub-Total	**31.40**	**94.85**	**33.62**	**14.69**	**45.53**	**4.32**	**2.60**	**18.11**	**27.88**	**273.01**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.62	7.31	1.35	0.00	0.00	0.00	0.42	0.61	11.31
Morrisons, Rye Lane, Peckham	0.20	4.45	19.01	14.13	1.04	0.71	4.17	0.63	2.49	46.84
Morrisons, Denmark Hill	2.65	0.00	5.72	0.61	0.00	0.00	2.50	4.42	0.92	16.83
Other Main Food Stores in Zone 3	0.00	3.91	15.82	1.97	0.00	1.28	0.63	1.26	1.41	26.28
Other Local Shops Zone 3	1.68	5.13	9.90	0.12	4.72	5.84	0.63	10.10	2.05	40.16
Zone 3 Sub-Total	**4.54**	**15.11**	**57.77**	**18.18**	**5.76**	**7.83**	**7.92**	**16.84**	**7.48**	**141.43**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.26	0.13	8.87	31.66	5.17	0.43	7.06	6.25	3.37	63.19
Other Main Food Stores in Zone 4	0.31	0.00	1.33	19.66	8.00	0.00	3.13	0.00	1.75	34.17
Other Local Shops Zone 4	0.00	0.14	0.56	13.82	0.35	0.14	7.52	1.72	1.32	25.56
Zone 4 Sub-Total	**0.57**	**0.27**	**10.76**	**65.13**	**13.52**	**0.57**	**17.70**	**7.97**	**6.44**	**122.93**
LB Southwark Total	**127.43**	**122.04**	**132.09**	**99.76**	**65.33**	**13.29**	**29.75**	**66.09**	**61.70**	**717.47**
Stores in LB Lambeth	6.20	0.00	3.41	4.77	5.19	0.43	106.47	111.44	373.61	611.52
Stores in LB Lewisham	0.20	5.80	2.26	14.99	87.46	95.01	33.13	0.00	240.89	479.75
Stores in LB Croydon	0.00	0.00	0.84	0.00	0.35	0.57	10.44	2.15	132.00	146.34
Stores in LB Bromley	0.24	0.00	0.14	2.59	1.57	25.34	6.47	0.43	340.70	377.48
Stores in RB Greenwich	0.84	2.36	0.00	0.00	9.26	0.71	0.42	0.00	254.90	268.49
Other Outside	3.61	11.91	7.25	1.85	6.29	7.12	22.55	39.34	912.11	1,012.03
Total Outside LB Southwark	**11.10**	**20.07**	**13.90**	**24.20**	**110.12**	**129.18**	**179.48**	**153.36**	**2,254.21**	**2,895.62**
TOTAL	**138.53**	**142.11**	**146.00**	**123.96**	**175.45**	**142.46**	**209.23**	**219.45**	**2,315.91**	**3,613.09**

Source: Table 3 and 7

Table 12: Convenience Goods Expenditure 2026 (£m) - with commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	**149.35**	**148.36**	**154.00**	**128.76**	**190.90**	**148.56**	**217.67**	**232.66**		**1,370.26**
Zone 1 - Southwark North West										
Commitments Zone 1	61.03	5.89	15.62	0.93	0.00	0.00	0.94	11.16	4.92	100.50
Tesco Metro, Elephant & Castle	9.13	0.00	1.23	0.00	0.00	0.00	0.00	2.09	3.15	15.61
Morrisons, Walworth Road	9.24	0.00	5.62	0.00	0.00	0.00	0.00	3.34	6.49	24.69
Other Main Food Stores in Zone 1	6.79	0.27	4.30	0.00	0.56	0.30	0.65	4.91	4.59	22.36
Other Local Shops Zone 1	11.84	6.17	4.80	0.89	0.00	0.30	0.00	3.06	1.87	28.92
Zone 1 Sub-Total	**98.02**	**12.33**	**31.58**	**1.82**	**0.56**	**0.59**	**1.59**	**24.57**	**21.02**	**192.08**
Zone 2 - Southwark North East										
Commitments Zone 2	1.81	3.82	1.41	0.52	1.88	0.21	0.10	0.79	0.55	11.08
Tesco, Redriffe Road, Surrey Quays	1.34	35.23	1.52	0.63	10.12	0.15	0.00	1.28	9.76	60.04
Asda, Old Kent Road	4.70	15.50	17.47	12.96	15.82	3.41	0.00	10.48	9.72	90.06
Tesco, Dunton Road/Old Kent Road	9.94	6.86	7.07	0.38	7.53	0.30	0.43	1.97	4.63	39.11
Other Main Food Stores in Zone 2	3.85	27.19	7.99	0.77	10.78	0.15	0.43	2.90	3.00	57.07
Other Local Shops Zone 2	12.21	10.43	0.00	0.00	3.41	0.30	1.73	1.79	1.79	31.65
Zone 2 Sub-Total	**33.85**	**99.02**	**35.46**	**15.25**	**49.55**	**4.51**	**2.71**	**19.20**	**29.45**	**289.00**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.69	7.71	1.40	0.00	0.00	0.00	0.45	0.64	11.90
Morrisons, Rye Lane, Peckham	0.22	4.65	20.06	14.68	1.14	0.74	4.34	0.67	2.63	49.11
Morrisons, Denmark Hill	2.86	0.00	6.03	0.64	0.00	0.00	2.60	4.69	0.97	17.79
Other Main Food Stores in Zone 3	0.00	4.09	16.69	2.04	0.00	1.33	0.65	1.34	1.49	27.63
Other Local Shops Zone 3	1.82	5.35	10.45	0.13	5.13	6.09	0.65	10.71	2.16	42.48
Zone 3 Sub-Total	**4.90**	**15.78**	**60.94**	**18.89**	**6.27**	**8.16**	**8.24**	**17.85**	**7.90**	**148.92**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.28	0.13	9.36	32.88	5.62	0.44	7.34	6.62	3.56	66.25
Other Main Food Stores in Zone 4	0.33	0.00	1.40	20.42	8.70	0.00	3.25	0.00	1.85	35.96
Other Local Shops Zone 4	0.00	0.14	0.59	14.36	0.38	0.15	7.82	1.82	1.39	26.65
Zone 4 Sub-Total	**0.61**	**0.28**	**11.35**	**67.66**	**14.71**	**0.59**	**18.41**	**8.45**	**6.81**	**128.87**
LB Southwark Total	**137.38**	**127.41**	**139.33**	**103.62**	**71.08**	**13.86**	**30.95**	**70.07**	**65.17**	**758.87**
Stores in LB Lambeth	6.69	0.00	3.60	4.95	5.65	0.44	110.77	118.15	394.66	644.91
Stores in LB Lewisham	0.22	6.06	2.38	15.57	95.17	99.08	34.47	0.00	254.47	507.41
Stores in LB Croydon	0.00	0.00	0.88	0.00	0.38	0.59	10.86	2.28	139.43	154.43
Stores in LB Bromley	0.26	0.00	0.15	2.69	1.71	26.42	6.73	0.46	359.89	398.31
Stores in RB Greenwich	0.91	2.46	0.00	0.00	10.07	0.74	0.43	0.00	269.26	283.88
Other Outside	3.89	12.44	7.65	1.92	6.84	7.42	23.46	41.71	963.50	1,068.83
Total Outside LB Southwark	**11.96**	**20.96**	**14.67**	**25.14**	**119.82**	**134.71**	**186.72**	**162.59**	**2,381.21**	**3,057.78**
TOTAL	**149.35**	**148.36**	**154.00**	**128.76**	**190.90**	**148.56**	**217.67**	**232.66**	**2,446.39**	**3,816.65**

Source: Table 3 and 7

Table 13: Convenience Goods Expenditure 2031 (£m) - with commitments

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	**156.62**	**156.90**	**160.57**	**136.26**	**204.82**	**154.70**	**229.02**	**244.58**		**1,443.47**
Zone 1 - Southwark North West										
Commitments Zone 1	64.00	6.23	16.29	0.99	0.00	0.00	0.99	11.73	5.18	105.41
Tesco Metro, Elephant & Castle	9.57	0.00	1.28	0.00	0.00	0.00	0.00	2.20	3.32	16.38
Morrisons, Walworth Road	9.69	0.00	5.86	0.00	0.00	0.00	0.00	3.51	6.84	25.90
Other Main Food Stores in Zone 1	7.12	0.28	4.48	0.00	0.60	0.31	0.68	5.17	4.83	23.48
Other Local Shops Zone 1	12.41	6.53	5.01	0.94	0.00	0.31	0.00	3.21	1.97	30.38
Zone 1 Sub-Total	**102.79**	**13.04**	**32.93**	**1.93**	**0.60**	**0.62**	**1.67**	**25.83**	**22.14**	**201.55**
Zone 2 - Southwark North East										
Commitments Zone 2	1.90	4.04	1.47	0.55	2.01	0.22	0.11	0.83	0.58	11.70
Tesco, Redriffe Road, Surrey Quays	1.41	37.25	1.58	0.67	10.86	0.15	0.00	1.35	10.28	63.56
Asda, Old Kent Road	4.93	16.39	18.22	13.71	16.97	3.55	0.00	11.02	10.24	95.03
Tesco, Dunton Road/Old Kent Road	10.42	7.25	7.37	0.40	8.08	0.31	0.46	2.07	4.88	41.24
Other Main Food Stores in Zone 2	4.04	28.76	8.34	0.81	11.57	0.15	0.46	3.05	3.16	60.33
Other Local Shops Zone 2	12.81	11.03	0.00	0.00	3.65	0.31	1.82	1.88	1.89	33.39
Zone 2 Sub-Total	**35.50**	**104.72**	**36.98**	**16.14**	**53.16**	**4.69**	**2.85**	**20.19**	**31.02**	**305.25**
Zone 3 - Southwark Central										
Asda, Rye Lane, Peckham	0.00	1.79	8.04	1.49	0.00	0.00	0.00	0.47	0.68	12.46
Morrisons, Rye Lane, Peckham	0.23	4.92	20.91	15.53	1.22	0.77	4.56	0.70	2.77	51.61
Morrisons, Denmark Hill	3.00	0.00	6.29	0.68	0.00	0.00	2.74	4.93	1.03	18.65
Other Main Food Stores in Zone 3	0.00	4.32	17.40	2.16	0.00	1.39	0.68	1.41	1.57	28.93
Other Local Shops Zone 3	1.90	5.66	10.89	0.14	5.51	6.34	0.69	11.26	2.28	44.66
Zone 3 Sub-Total	**5.13**	**16.69**	**63.54**	**19.99**	**6.72**	**8.50**	**8.67**	**18.77**	**8.32**	**156.32**
Zone 4 - Southwark South										
Sainsbury's, Dog Kennel Hill	0.30	0.14	9.76	34.80	6.03	0.46	7.72	6.96	3.75	69.93
Other Main Food Stores in Zone 4	0.35	0.00	1.46	21.61	9.34	0.00	3.42	0.00	1.95	38.13
Other Local Shops Zone 4	0.00	0.15	0.61	15.19	0.41	0.15	8.23	1.92	1.47	28.13
Zone 4 Sub-Total	**0.64**	**0.29**	**11.84**	**71.60**	**15.78**	**0.62**	**19.37**	**8.88**	**7.17**	**136.19**
LB Southwark Total	**144.07**	**134.74**	**145.28**	**109.66**	**76.26**	**14.43**	**32.56**	**73.66**	**68.65**	**799.31**
Stores in LB Lambeth	7.01	0.00	3.75	5.24	6.06	0.46	116.54	124.20	415.74	679.02
Stores in LB Lewisham	0.23	6.41	2.49	16.48	102.10	103.17	36.27	0.00	268.06	535.20
Stores in LB Croydon	0.00	0.00	0.92	0.00	0.41	0.62	11.43	2.40	146.88	162.65
Stores in LB Bromley	0.27	0.00	0.15	2.85	1.84	27.51	7.09	0.48	379.12	419.31
Stores in RB Greenwich	0.95	2.60	0.00	0.00	10.81	0.77	0.46	0.00	283.65	299.24
Other Outside	4.08	13.15	7.98	2.03	7.34	7.73	24.68	43.84	1,014.97	1,125.82
Total Outside LB Southwark	**12.55**	**22.16**	**15.29**	**26.60**	**128.56**	**140.27**	**196.46**	**170.92**	**2,508.43**	**3,221.24**
TOTAL	**156.62**	**156.90**	**160.57**	**136.26**	**204.82**	**154.70**	**229.02**	**244.58**	**2,577.08**	**4,020.55**

Source: Table 3 and 7

Table 14: Summary of Convenience Goods Expenditure 2014 to 2031

	2014	2016	2021	2026	2031
Available Expenditure in LB Southwark (£m)					
Zone 1 - Southwark North West	113.84	167.87	180.11	192.08	201.55
Zone 2 - Southwark North East	262.48	254.22	273.01	289.00	305.25
Zone 3 - Southwark Central	137.45	133.60	141.43	148.92	156.32
Zone 4 - Southwark South	119.58	117.75	122.93	128.87	136.19
Total	**633.34**	**673.44**	**717.47**	**758.87**	**799.31**
Turnover of Existing Facilities (£m)					
Zone 1 - Southwark North West	113.84	113.84	113.84	113.84	113.84
Zone 2 - Southwark North East	262.48	262.48	262.48	262.48	262.48
Zone 3 - Southwark Central	137.45	137.45	137.45	137.45	137.45
Zone 4 - Southwark South	119.58	119.58	119.58	119.58	119.58
Total	**633.34**	**633.34**	**633.34**	**633.34**	**633.34**
Turnover of Commitments (£m)					
Zone 1 - Southwark North West	0.00	87.60	87.60	87.60	87.60
Zone 2 - Southwark North East	0.00	9.73	9.73	9.73	9.73
Zone 3 - Southwark Central	0.00	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**97.32**	**97.32**	**97.32**	**97.32**
Surplus/Deficit Expenditure (£m)					
Zone 1 - Southwark North West	0.00	-33.56	-21.32	-9.35	0.12
Zone 2 - Southwark North East	0.00	-17.99	0.80	16.79	33.04
Zone 3 - Southwark Central	0.00	-3.85	3.98	11.47	18.88
Zone 4 - Southwark South	0.00	-1.82	3.35	9.29	16.61
Total	**0.00**	**-57.22**	**-13.19**	**28.20**	**68.65**

Source: Table 5 and 12

Table 15: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031

	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Zone 1 - Southwark North West	0	-2,582	-1,640	-719	9
Zone 2 - Southwark North East	0	-1,384	61	1,292	2,542
Zone 3 - Southwark Central	0	-296	306	882	1,452
Zone 4 - Southwark South	0	-140	257	714	1,278
Total	**0**	**-4,402**	**-1,015**	**2,169**	**5,280**
Floorspace Requirement (sq.m gross)					
Zone 1 - Southwark North West	0	-3,688	-2,343	-1,027	13
Zone 2 - Southwark North East	0	-1,977	88	1,846	3,631
Zone 3 - Southwark Central	0	-423	438	1,260	2,074
Zone 4 - Southwark South	0	-201	368	1,021	1,826
Total	**0**	**-6,288**	**-1,450**	**3,099**	**7,543**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population – Baseline Projections

Zone	2011	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	71,317	78,072	81,182	86,015	90,566	92,762
Zone 2 - Southwark North East	69,747	74,564	77,308	81,658	83,258	86,000
Zone 3 - Southwark Central	85,282	87,070	88,648	92,158	94,940	96,684
Zone 4 - Southwark South	63,002	62,979	63,319	63,784	64,708	66,883
Zone 5 - Lewisham North West	80,858	86,012	89,425	97,528	103,644	108,609
Zone 6 - Lewisham South West	73,736	75,476	76,335	77,346	78,776	80,119
Zone 7 - Lambeth South East	105,477	107,704	109,095	111,121	112,909	116,028
Zone 8 - Lambeth North East	100,307	106,826	110,915	119,208	123,436	126,735
Total	**649,726**	**678,703**	**696,227**	**728,818**	**752,237**	**773,820**

Source: GLA 2013 Round of Demographic Projections – Trend-based ward projections

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	2,434	2,576	2,936	3,453	4,081
Zone 2 - Southwark North East	2,769	2,930	3,339	3,928	4,642
Zone 3 - Southwark Central	2,311	2,445	2,786	3,277	3,873
Zone 4 - Southwark South	3,438	3,638	4,146	4,877	5,763
Zone 5 - Lewisham North West	2,883	3,051	3,477	4,089	4,833
Zone 6 - Lewisham South West	2,993	3,167	3,610	4,246	5,018
Zone 7 - Lambeth South East	3,215	3,401	3,876	4,560	5,389
Zone 8 - Lambeth North East	3,065	3,243	3,695	4,347	5,137

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 4.6% 2012-2013, 5.6% 2013-2014, 4.4% 2014-2015, 3.1% 2015 -2016 and 3.3% p.a. from 2016

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	190.06	209.11	252.51	312.73	378.56
Zone 2 - Southwark North East	206.47	226.50	272.66	327.00	399.19
Zone 3 - Southwark Central	201.18	216.72	256.77	311.15	374.49
Zone 4 - Southwark South	216.53	230.34	264.44	315.55	385.47
Zone 5 - Lewisham North West	247.98	272.80	339.07	423.84	524.91
Zone 6 - Lewisham South West	225.92	241.77	279.18	334.46	402.02
Zone 7 - Lambeth South East	346.24	371.08	430.76	514.84	625.27
Zone 8 - Lambeth North East	327.37	359.64	440.52	536.54	651.06
Total	**1,961.75**	**2,127.96**	**2,535.90**	**3,076.10**	**3,740.96**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Elephant & Castle / Walworth Road	16.3%	0.2%	6.6%	3.1%	0.4%	0.0%	0.3%	5.4%	15.0%
Bankside & Borough	1.3%	3.8%	0.6%	0.3%	0.1%	0.2%	0.1%	0.4%	15.0%
Zone 2 - Southwark North East									
London Bridge	0.6%	0.0%	0.4%	0.0%	0.1%	0.0%	0.0%	0.2%	50.0%
Surrey Quays/Canada Water	2.1%	18.8%	1.2%	0.2%	1.9%	0.3%	0.0%	0.7%	15.0%
The Blue	2.2%	2.5%	0.1%	0.0%	0.3%	0.0%	0.0%	0.1%	5.0%
Old Kent Road	24.0%	20.7%	29.0%	12.6%	11.5%	1.1%	1.2%	9.0%	10.0%
Zone 3 - Southwark Central									
Peckham	2.2%	6.3%	18.4%	6.7%	8.8%	3.0%	0.7%	0.3%	5.0%
Camberwell	1.5%	0.3%	1.1%	0.6%	0.0%	0.0%	0.4%	0.2%	5.0%
Nunhead	0.2%	0.1%	0.5%	0.5%	0.1%	0.0%	0.1%	0.0%	5.0%
Zone 4 - Southwark South									
Lordship Lane	0.0%	0.0%	2.7%	7.7%	0.7%	0.2%	0.7%	0.7%	5.0%
Herne Hill	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	2.8%	1.5%	5.0%
Dulwich Village	0.0%	0.0%	0.5%	6.3%	1.0%	0.2%	1.6%	0.9%	5.0%
LB Southwark Total	**50.4%**	**52.7%**	**61.2%**	**38.1%**	**24.9%**	**5.0%**	**7.9%**	**19.4%**	
Central London/West End	36.1%	24.3%	19.8%	19.0%	13.0%	19.5%	19.6%	42.7%	90.0%
Centres in LB Lambeth	2.4%	1.0%	1.5%	3.4%	1.2%	0.6%	23.3%	20.6%	60.0%
Centres in LB Lewisham	3.5%	3.4%	4.9%	7.9%	37.1%	27.5%	5.4%	0.6%	50.0%
Centres in LB Croydon	1.5%	0.9%	3.0%	8.5%	2.3%	10.3%	26.0%	4.6%	80.0%
Centres in LB Bromley	0.8%	0.5%	3.9%	14.2%	8.9%	22.6%	3.3%	0.5%	75.0%
Centres in RB Greenwich	0.0%	1.4%	0.7%	0.1%	3.3%	3.9%	3.5%	0.0%	85.0%
Other Outside	5.3%	15.8%	5.0%	8.8%	9.3%	10.6%	11.0%	11.6%	90.0%
Total Outside LB Southwark	**49.6%**	**47.3%**	**38.8%**	**61.9%**	**75.1%**	**95.0%**	**92.1%**	**80.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey August 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	**190.06**	**206.47**	**201.18**	**216.53**	**247.98**	**225.92**	**346.24**	**327.37**		**1,961.75**
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	30.98	0.41	13.28	6.71	0.99	0.00	1.04	17.68	12.55	83.64
Bankside & Borough	2.47	7.85	1.21	0.65	0.25	0.45	0.35	1.31	2.56	17.09
Zone 2 - Southwark North East										
London Bridge	1.14	0.00	0.80	0.00	0.25	0.00	0.00	0.65	2.85	5.70
Surrey Quays/Canada Water	3.99	38.82	2.41	0.43	4.71	0.68	0.00	2.29	9.41	62.75
The Blue	4.18	5.16	0.20	0.00	0.74	0.00	0.00	0.33	0.56	11.17
Old Kent Road	45.61	42.74	58.34	27.28	28.52	2.49	4.15	29.46	26.51	265.11
Zone 3 - Southwark Central										
Peckham	4.18	13.01	37.02	14.51	21.82	6.78	2.42	0.98	5.30	106.02
Camberwell	2.85	0.62	2.21	1.30	0.00	0.00	1.38	0.65	0.47	9.50
Nunhead	0.38	0.21	1.01	1.08	0.25	0.00	0.35	0.00	0.17	3.44
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.43	16.67	1.74	0.45	2.42	2.29	1.53	30.53
Herne Hill	0.00	0.00	0.20	0.22	0.00	0.00	9.69	4.91	0.79	15.81
Dulwich Village	0.00	0.00	1.01	13.64	2.48	0.45	5.54	2.95	1.37	27.44
LB Southwark Total	**95.79**	**108.81**	**123.12**	**82.50**	**61.75**	**11.30**	**27.35**	**63.51**	**64.08**	**638.20**
Central London/West End	68.61	50.17	39.83	41.14	32.24	44.06	67.86	139.79	4,353.31	4,837.01
Centres in LB Lambeth	4.56	2.06	3.02	7.36	2.98	1.36	80.67	67.44	254.17	423.62
Centres in LB Lewisham	6.65	7.02	9.86	17.11	92.00	62.13	18.70	1.96	215.43	430.85
Centres in LB Croydon	2.85	1.86	6.04	18.40	5.70	23.27	90.02	15.06	652.82	816.02
Centres in LB Bromley	1.52	1.03	7.85	30.75	22.07	51.06	11.43	1.64	382.01	509.35
Centres in RB Greenwich	0.00	2.89	1.41	0.22	8.18	8.81	12.12	0.00	190.56	224.19
Other Outside	10.07	32.62	10.06	19.05	23.06	23.95	38.09	37.97	1,753.92	1,948.80
Total Outside LB Southwark	**94.27**	**97.66**	**78.06**	**134.03**	**186.23**	**214.63**	**318.89**	**263.86**	**7,802.22**	**1,387.63**
TOTAL	**190.06**	**206.47**	**201.18**	**216.53**	**247.98**	**225.92**	**346.24**	**327.37**	**7,866.29**	**2,025.83**

Source: Tables 3 and 4

Table 6: Existing Comparison Goods Floorspace 2014

	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1 - Southwark North West		
Elephant & Castle	4,710	3,297
Walworth Road	17,980	12,586
Bankside & Borough	1,450	1,015
Tower Bridge Road	640	448
Comparison sales in food stores	n/a	732
Zone 2 - Southwark North East		
London Bridge	1,520	1,064
Surrey Quays/Canada Water	19,928	15,942
The Blue	2,450	1,715
Old Kent Road	19,800	16,800
Comparison sales in food stores	n/a	3,991
Zone 3 - Southwark Central		
Peckham	27,270	19,089
Camberwell	5,680	3,976
Nunhead	3,000	2,100
Comparison sales in food stores	n/a	925
Zone 4 - Southwark South		
Lordship Lane	6,680	4,676
Herne Hill (LB Southwark only)	3,000	2,100
Dulwich Village	1,600	1,120
Comparison sales in food stores	n/a	1,509
LB Southwark Total	**115,708**	**93,085**

Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 7: Comparison Goods Expenditure 2016 (£m) – without commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**209.11**	**226.50**	**216.72**	**230.34**	**272.80**	**241.77**	**371.08**	**359.64**		**2,127.96**
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	34.09	0.45	14.30	7.14	1.09	0.00	1.11	19.42	13.70	91.30
Bankside & Borough	2.72	8.61	1.30	0.69	0.27	0.48	0.37	1.44	2.80	18.69
Zone 2 - Southwark North East										
London Bridge	1.25	0.00	0.87	0.00	0.27	0.00	0.00	0.72	3.11	6.23
Surrey Quays/Canada Water	4.39	42.58	2.60	0.46	5.18	0.73	0.00	2.52	10.32	68.78
The Blue	4.60	5.66	0.22	0.00	0.82	0.00	0.00	0.36	0.61	12.27
Old Kent Road	50.19	46.89	62.85	29.02	31.37	2.66	4.45	32.37	28.87	288.66
Zone 3 - Southwark Central										
Peckham	4.60	14.27	39.88	15.43	24.01	7.25	2.60	1.08	5.74	114.86
Camberwell	3.14	0.68	2.38	1.38	0.00	0.00	1.48	0.72	0.52	10.30
Nunhead	0.42	0.23	1.08	1.15	0.27	0.00	0.37	0.00	0.19	3.71
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.85	17.74	1.91	0.48	2.60	2.52	1.64	32.73
Herne Hill	0.00	0.00	0.22	0.23	0.00	0.00	10.39	5.39	0.85	17.09
Dulwich Village	0.00	0.00	1.08	14.51	2.73	0.48	5.94	3.24	1.47	29.45
LB Southwark Total	**105.39**	**119.36**	**132.64**	**87.76**	**67.93**	**12.09**	**29.32**	**69.77**	**69.82**	**694.07**
Central London/West End	75.49	55.04	42.91	43.76	35.46	47.14	72.73	153.57	4,735.00	5,261.11
Centres in LB Lambeth	5.02	2.26	3.25	7.83	3.27	1.45	86.46	74.09	275.46	459.09
Centres in LB Lewisham	7.32	7.70	10.62	18.20	101.21	66.49	20.04	2.16	233.73	467.45
Centres in LB Croydon	3.14	2.04	6.50	19.58	6.27	24.90	96.48	16.54	701.82	877.28
Centres in LB Bromley	1.67	1.13	8.45	32.71	24.28	54.64	12.25	1.80	410.78	547.71
Centres in RB Greenwich	0.00	3.17	1.52	0.23	9.00	9.43	12.99	0.00	205.91	242.25
Other Outside	11.08	35.79	10.84	20.27	25.37	25.63	40.82	41.72	1,903.59	2,115.10
Total Outside LB Southwark	**103.72**	**107.13**	**84.09**	**142.58**	**204.87**	**229.68**	**341.76**	**289.87**	**8,466.29**	**9,970.00**
TOTAL	**209.11**	**226.50**	**216.72**	**230.34**	**272.80**	**241.77**	**371.08**	**359.64**	**8,536.11**	**10,664.06**

Source: Tables 3 and 4

Table 8: Comparison Goods Commitments Floorspace 2014

	Additional Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1 - Southwark North West		
The Heygate Estate (1)	9,063	6,797
Century House, Tanner Street (2)	1,840	1,380
King's Reach Tower, Stamford Street (3)	1,480	1,110
Brandon House, Borough High Street (4)	365	274
One Blackfriars, Blackfriars Road (5)	526	395
Sea Containers House, Upper Ground (6)	512	384
127 Borough High Street (7)	193	145
90-91 & 92 Blackfriars Road (8)	316	237
Former Elephant & Castle Swimming Pool (9)	388	291
4-10 Lamb Walk (10)	218	164
Castle Industrial Estate (11)	732	549
Eileen House (12)	144	108
Zone 1 - Sub-Total	**15,777**	**11,833**
Zone 2 - Southwark North East		
Surrey Quays Shopping Centre Extension (13)	7,484	5,613
Decathlon (Sites C and E), Surrey Quays (14)	6,800	5,440
Surrey Quays Leisure Park (15)	1,810	1,448
Zone 2 - Sub-Total	**16,094**	**12,501**
LB Southwark Total	**31,871**	**24,334**

(1) DP9 Retail Assessment assumed floorspace breakdown
(2) Planning Application - 3,680 sq.m gross A1 (assume 50% A1 comparison)
(3) Planning Application - 3,701 sq.m gross increase A1 to A5 (assume 40% A1 comparison)
(4) Planning Application - 1,460 sq.m gross increase A1/B1 (assume 25% A1 comparison)
(5) Planning Application - 1,316 sq.m gross increase A1 to A5 (assume 40% A1 comparison)
(6) Planning Application - 1,281 sq.m gross increase A1 to A3 (assume 40% A1 comparison)
(7) Planning Application - 482 sq.m gross increase A1 to A3 (assume 40% A1 comparison)
(8) Planning Application - 633 sq.m gross A1 (assume 50% A1 comparison)
(9) Planning Application - 776 sq.m gross A1 (assume 50% A1 comparison)
(10) Planning Application - 873 sq.m gross increase A1 to A5/B1/D1 (assume 25% A1 comparison)
(11) Planning Application - 732 sq.m gross increase A1 comparison
(12) Planning Application - 287 sq.m gross increase A1 (assume 50% comparison)
(13) 10,691 sq.m gross increase A1 to A5 (assume 70% A1 comparison)
(14) Planning Application - 3,999 sq.m increase in Decathlon unit plus 4,035 sq.m in A1 to A4 (assume 70% A1 comparison)
(15) Planning Application - 1,810 sq.m gross net increase in A1

Table 9: Turnover and Trade Draw of Commitments at 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	34.0%	8.0%	14.0%	7.0%	1.0%	1.0%	1.0%	19.0%	15.0%	100.0%
Zone 2 - Commitments Trade Draw %	6.0%	62.0%	4.0%	1.0%	7.0%	1.0%	0.0%	4.0%	15.0%	100.0%
Zone 1 - Commitments Turnover £M	21.13	4.97	8.70	4.35	0.62	0.62	0.62	11.81	9.32	62.16
Zone 2 - Commitments Turnover £M	3.94	40.71	2.63	0.66	4.60	0.66	0.00	2.63	9.85	65.67

Source: NEMS Household Survey August 2014. Sales floorspace of commitments at £5,253 per sq.m net

Table 10: Comparison Goods Expenditure 2016 (£m) - With Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**209.11**	**226.50**	**216.72**	**230.34**	**272.80**	**241.77**	**371.08**	**359.64**		**2,127.96**
Zone 1 - Southwark North West										
Zone 1 commitments	21.13	4.97	8.70	4.35	0.62	0.62	0.62	11.81	9.32	62.16
Elephant & Castle / Walworth Road	29.19	0.34	13.37	6.92	1.06	0.00	1.11	18.34	13.65	83.98
Bankside & Borough	2.33	6.46	1.22	0.67	0.27	0.48	0.37	1.36	2.79	15.94
Zone 2 - Southwark North East										
Zone 2 commitments	3.94	40.71	2.63	0.66	4.60	0.66	0.00	2.63	9.85	65.67
London Bridge	1.12	0.00	0.82	0.00	0.27	0.00	0.00	0.69	3.11	6.01
Surrey Quays/Canada Water	3.76	31.95	2.43	0.45	5.04	0.72	0.00	2.38	10.28	57.01
The Blue	4.11	4.60	0.21	0.00	0.80	0.00	0.00	0.34	0.61	10.67
Old Kent Road	42.98	35.18	58.76	28.11	30.50	2.64	4.44	30.56	28.77	261.94
Zone 3 - Southwark Central										
Peckham	4.11	11.60	37.93	15.07	23.50	7.21	2.59	1.03	5.73	108.77
Camberwell	2.80	0.55	2.27	1.35	0.00	0.00	1.48	0.69	0.51	9.65
Nunhead	0.39	0.20	1.05	1.13	0.27	0.00	0.37	0.00	0.19	3.59
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	5.66	17.46	1.88	0.48	2.59	2.45	1.63	32.16
Herne Hill	0.00	0.00	0.21	0.23	0.00	0.00	10.38	5.24	0.85	16.91
Dulwich Village	0.00	0.00	1.05	14.28	2.69	0.48	5.93	3.15	1.47	29.05
LB Southwark Total	**115.85**	**136.58**	**136.30**	**90.66**	**71.50**	**13.29**	**29.89**	**80.66**	**88.77**	**763.50**
Central London/West End	67.36	44.74	40.82	42.73	34.72	46.85	72.59	147.14	4,723.02	5,219.97
Centres in LB Lambeth	4.57	1.91	3.12	7.68	3.22	1.44	86.32	71.50	274.88	454.63
Centres in LB Lewisham	6.66	6.50	10.19	17.84	99.45	66.14	20.01	2.08	233.23	462.10
Centres in LB Croydon	2.86	1.72	6.24	19.19	6.17	24.77	96.32	15.97	700.34	873.58
Centres in LB Bromley	1.52	0.96	8.11	32.06	23.86	54.36	12.23	1.74	409.92	544.74
Centres in RB Greenwich	0.00	2.78	1.47	0.23	8.88	9.39	12.97	0.00	205.56	241.27
Other Outside	10.29	31.32	10.48	19.95	25.02	25.52	40.76	40.55	1,900.38	2,104.28
Total Outside LB Southwark	**93.26**	**89.92**	**80.42**	**139.68**	**201.30**	**228.48**	**341.19**	**278.98**	**8,447.34**	**9,900.56**
TOTAL	**209.11**	**226.50**	**216.72**	**230.34**	**272.80**	**241.77**	**371.08**	**359.64**	**8,536.11**	**10,664.06**

Source: Tables 3, 6 and 9

Table 11: Comparison Goods Expenditure 2021 (£m) - With commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	**252.51**	**272.66**	**256.77**	**264.44**	**339.07**	**279.18**	**430.76**	**440.52**		**2,535.90**
Zone 1 - Southwark North West										
Zone 1 commitments	25.52	5.99	10.31	5.00	0.77	0.72	0.72	14.47	11.11	74.60
Elephant & Castle / Walworth Road	35.25	0.41	15.84	7.94	1.32	0.00	1.29	22.46	16.27	100.78
Bankside & Borough	2.81	7.78	1.44	0.77	0.33	0.55	0.43	1.66	3.33	19.10
Zone 2 - Southwark North East										
Zone 2 commitments	4.76	49.01	3.11	0.75	5.71	0.76	0.00	3.22	11.74	79.06
London Bridge	1.35	0.00	0.98	0.00	0.33	0.00	0.00	0.84	3.70	7.21
Surrey Quays/Canada Water	4.54	38.47	2.88	0.51	6.26	0.83	0.00	2.91	12.25	68.66
The Blue	4.96	5.54	0.24	0.00	1.00	0.00	0.00	0.42	0.73	12.89
Old Kent Road	51.90	42.35	69.62	32.27	37.91	3.05	5.16	37.43	34.28	313.97
Zone 3 - Southwark Central										
Peckham	4.96	13.96	44.94	17.30	29.21	8.32	3.01	1.27	6.83	129.80
Camberwell	3.38	0.66	2.69	1.55	0.00	0.00	1.72	0.84	0.61	11.46
Nunhead	0.47	0.24	1.24	1.30	0.33	0.00	0.43	0.00	0.22	4.24
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	6.71	20.04	2.34	0.56	3.01	3.00	1.95	37.60
Herne Hill	0.00	0.00	0.25	0.26	0.00	0.00	12.05	6.42	1.02	19.99
Dulwich Village	0.00	0.00	1.24	16.40	3.34	0.56	6.88	3.85	1.75	34.03
LB Southwark Total	**139.90**	**164.41**	**161.49**	**104.08**	**88.86**	**15.34**	**34.69**	**98.80**	**105.79**	**913.37**
Central London/West End	81.34	53.85	48.36	49.05	43.16	54.10	84.26	180.23	5,628.46	6,222.82
Centres in LB Lambeth	5.52	2.30	3.69	8.81	4.00	1.67	100.20	87.58	327.57	541.34
Centres in LB Lewisham	8.04	7.82	12.07	20.48	123.60	76.38	23.22	2.55	277.94	552.12
Centres in LB Croydon	3.45	2.07	7.39	22.03	7.66	28.61	111.81	19.56	834.61	1,037.19
Centres in LB Bromley	1.84	1.15	9.61	36.81	29.65	62.77	14.19	2.13	488.50	646.65
Centres in RB Greenwich	0.00	3.34	1.74	0.26	11.03	10.84	15.06	0.00	244.97	287.25
Other Outside	12.42	37.70	12.42	22.90	31.09	29.47	47.32	49.67	2,264.70	2,507.71
Total Outside LB Southwark	**112.61**	**108.25**	**95.28**	**160.35**	**250.20**	**263.84**	**396.07**	**341.71**	**10,066.75**	**11,795.07**
TOTAL	**252.51**	**272.66**	**256.77**	**264.44**	**339.07**	**279.18**	**430.76**	**440.52**	**10,172.54**	**12,708.44**

Source: Tables 3 and 10

Table 12: Comparison Goods Expenditure 2026 (£m) - With Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	**312.73**	**327.00**	**311.15**	**315.55**	**423.84**	**334.46**	**514.84**	**536.54**		**3,076.10**
Zone 1 - Southwark North West										
Zone 1 commitments	31.61	7.18	12.49	5.96	0.97	0.86	0.86	17.62	13.48	91.02
Elephant & Castle / Walworth Road	43.66	0.49	19.20	9.47	1.65	0.00	1.54	27.36	19.73	123.10
Bankside & Borough	3.48	9.32	1.75	0.92	0.41	0.66	0.51	2.03	4.04	23.12
Zone 2 - Southwark North East										
Zone 2 commitments	5.89	58.78	3.77	0.90	7.14	0.91	0.00	3.92	14.24	95.55
London Bridge	1.67	0.00	1.18	0.00	0.41	0.00	0.00	1.03	4.49	8.79
Surrey Quays/Canada Water	5.62	46.13	3.49	0.61	7.83	1.00	0.00	3.55	14.86	83.09
The Blue	6.14	6.64	0.30	0.00	1.24	0.00	0.00	0.51	0.88	15.72
Old Kent Road	64.28	50.80	84.36	38.51	47.38	3.65	6.16	45.59	41.59	382.32
Zone 3 - Southwark Central										
Peckham	6.14	16.74	54.46	20.64	36.52	9.97	3.60	1.54	8.28	157.89
Camberwell	4.19	0.80	3.26	1.85	0.00	0.00	2.06	1.03	0.74	13.91
Nunhead	0.58	0.29	1.51	1.55	0.42	0.00	0.51	0.00	0.27	5.12
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	8.13	23.91	2.93	0.67	3.60	3.65	2.36	45.25
Herne Hill	0.00	0.00	0.30	0.31	0.00	0.00	14.40	7.82	1.23	24.06
Dulwich Village	0.00	0.00	1.51	19.57	4.18	0.67	8.23	4.69	2.13	40.96
LB Southwark Total	**173.26**	**197.18**	**195.69**	**124.20**	**111.08**	**18.38**	**41.47**	**120.34**	**128.32**	**1,109.92**
Central London/West End	100.74	64.59	58.60	58.54	53.95	64.82	100.71	219.51	6,827.44	7,548.89
Centres in LB Lambeth	6.83	2.76	4.48	10.52	5.00	2.00	119.76	106.67	397.35	655.36
Centres in LB Lewisham	9.96	9.38	14.63	24.44	154.51	91.50	27.76	3.11	337.15	672.44
Centres in LB Croydon	4.27	2.48	8.95	26.29	9.58	34.27	133.64	23.82	1,012.39	1,255.70
Centres in LB Bromley	2.28	1.38	11.64	43.93	37.07	75.20	16.96	2.59	592.56	783.60
Centres in RB Greenwich	0.00	4.01	2.11	0.31	13.79	12.99	18.00	0.00	297.16	348.36
Other Outside	15.38	45.22	15.05	27.33	38.87	35.31	56.56	60.50	2,747.13	3,041.35
Total Outside LB Southwark	**139.47**	**129.82**	**115.46**	**191.35**	**312.76**	**316.08**	**473.37**	**416.20**	**12,211.18**	**14,305.69**
TOTAL	**312.73**	**327.00**	**311.15**	**315.55**	**423.84**	**334.46**	**514.84**	**536.54**	**12,339.51**	**15,415.61**

Source: Tables 3 and 10

Table 13: Comparison Goods Expenditure 2031 (£m) - With Commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	**378.56**	**399.19**	**374.49**	**385.47**	**524.91**	**402.02**	**625.27**	**651.06**		**3,740.96**
Zone 1 - Southwark North West										
Zone 1 commitments	38.26	8.76	15.04	7.28	1.20	1.03	1.05	21.38	16.39	110.39
Elephant & Castle / Walworth Road	52.85	0.60	23.11	11.57	2.04	0.00	1.87	33.19	24.00	149.23
Bankside & Borough	4.21	11.38	2.10	1.12	0.51	0.80	0.62	2.46	4.91	28.12
Zone 2 - Southwark North East										
Zone 2 commitments	7.13	71.76	4.54	1.10	8.85	1.09	0.00	4.76	17.32	116.54
London Bridge	2.03	0.00	1.42	0.00	0.51	0.00	0.00	1.25	5.46	10.67
Surrey Quays/Canada Water	6.81	56.32	4.20	0.75	9.70	1.20	0.00	4.30	18.08	101.35
The Blue	7.43	8.11	0.36	0.00	1.54	0.00	0.00	0.62	1.08	19.14
Old Kent Road	77.81	62.01	101.53	47.04	58.68	4.39	7.48	55.32	50.58	464.84
Zone 3 - Southwark Central										
Peckham	7.43	20.44	65.54	25.22	45.23	11.99	4.37	1.87	10.07	192.15
Camberwell	5.07	0.97	3.92	2.26	0.00	0.00	2.50	1.25	0.90	16.86
Nunhead	0.70	0.35	1.81	1.90	0.52	0.00	0.62	0.00	0.33	6.23
Zone 4 - Southwark South										
Lordship Lane	0.00	0.00	9.78	29.21	3.62	0.80	4.37	4.43	2.87	55.09
Herne Hill	0.00	0.00	0.36	0.38	0.00	0.00	17.48	9.49	1.50	29.22
Dulwich Village	0.00	0.00	1.81	23.90	5.18	0.80	9.99	5.70	2.58	49.96
LB Southwark Total	**209.73**	**240.71**	**235.53**	**151.72**	**137.57**	**22.09**	**50.36**	**146.03**	**156.06**	**1,349.79**
Central London/West End	121.95	78.85	70.53	71.51	66.81	77.91	122.31	266.36	8,303.10	9,179.32
Centres in LB Lambeth	8.27	3.37	5.39	12.85	6.19	2.40	145.45	129.44	483.23	796.58
Centres in LB Lewisham	12.06	11.46	17.60	29.85	191.35	109.99	33.71	3.77	410.02	819.81
Centres in LB Croydon	5.17	3.03	10.78	32.12	11.86	41.19	162.30	28.90	1,231.21	1,526.57
Centres in LB Bromley	2.76	1.68	14.01	53.66	45.90	90.39	20.60	3.14	720.64	952.78
Centres in RB Greenwich	0.00	4.89	2.54	0.38	17.08	15.61	21.86	0.00	361.38	423.74
Other Outside	18.62	55.20	18.11	33.39	48.14	42.44	68.69	73.41	3,340.88	3,698.89
Total Outside LB Southwark	**168.83**	**158.48**	**138.96**	**233.75**	**387.34**	**379.93**	**574.91**	**505.03**	**14,850.47**	**17,397.70**
TOTAL	**378.56**	**399.19**	**374.49**	**385.47**	**524.91**	**402.02**	**625.27**	**651.06**	**15,006.53**	**18,747.49**

Source: Tables 3 and 10

Table 14: Summary of Comparison Goods Expenditure 2014 to 2031 - With Commitments

	2014	2016	2021	2026	2031
Available Expenditure in Southwark (£m)					
Zone 1 - Southwark North West	100.73	162.07	194.48	237.24	287.74
Zone 2 - Southwark North East	344.73	401.30	481.79	585.47	712.54
Zone 3 - Southwark Central	118.96	122.01	145.49	176.93	215.25
Zone 4 - Southwark South	73.78	78.12	91.62	110.27	134.27
Total	**638.20**	**763.50**	**913.37**	**1,109.92**	**1,349.79**
Turnover of Existing Facilities (£m)					
Zone 1 - Southwark North West	100.73	105.83	119.74	135.47	153.27
Zone 2 - Southwark North East	344.73	362.18	409.77	463.62	524.55
Zone 3 - Southwark Central	118.96	124.98	141.40	159.99	181.01
Zone 4 - Southwark South	73.78	77.52	87.71	99.23	112.27
Total	**638.20**	**670.51**	**758.62**	**858.31**	**971.10**
Turnover of Commitments (£m)					
Zone 1 - Southwark North West	n/a	62.16	70.33	79.57	90.02
Zone 2 - Southwark North East	n/a	65.67	74.30	84.06	95.11
Zone 3 - Southwark Central	n/a	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	n/a	0.00	0.00	0.00	0.00
Total	**n/a**	**127.83**	**144.62**	**163.63**	**185.13**
Surplus/Deficit Expenditure (£m)					
Zone 1 - Southwark North West	n/a	-5.91	4.41	22.20	44.44
Zone 2 - Southwark North East	n/a	-26.55	-2.29	37.79	92.89
Zone 3 - Southwark Central	n/a	-2.97	4.09	16.94	34.24
Zone 4 - Southwark South	n/a	0.60	3.91	11.04	22.00
Total	**n/a**	**-34.84**	**10.13**	**87.98**	**193.56**

Source: Tables 5 and 13

Table 15: Comparison Goods Floorspace Expenditure Capacity 2014 to 2031 - over and above commiments

	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,253	£5,943	£6,724	£7,608
Floorspace Requirement (sq.m net)					
Zone 1 - Southwark North West	n/a	-1,126	743	3,302	5,841
Zone 2 - Southwark North East	n/a	-5,055	-385	5,620	12,209
Zone 3 - Southwark Central	n/a	-565	687	2,520	4,500
Zone 4 - Southwark South	n/a	113	659	1,642	2,892
Total	**n/a**	**-6,632**	**1,704**	**13,084**	**25,442**
Floorspace Requirement (sq.m gross)					
Zone 1 - Southwark North West	n/a	-1,501	990	4,402	7,788
Zone 2 - Southwark North East	n/a	-6,740	-513	7,494	16,279
Zone 3 - Southwark Central	n/a	-753	917	3,360	6,000
Zone 4 - Southwark South	n/a	151	878	2,189	3,856
Total	**n/a**	**-8,842**	**2,272**	**17,445**	**33,922**

Appendix 4 Food & Beverage Capacity

Table 1: Study Area Population – Baseline Projections

Zone	2011	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	71,317	78,072	81,182	86,015	90,566	92,762
Zone 2 - Southwark North East	69,747	74,564	77,308	81,658	83,258	86,000
Zone 3 - Southwark Central	85,282	87,070	88,648	92,158	94,940	96,684
Zone 4 - Southwark South	63,002	62,979	63,319	63,784	64,708	66,883
Zone 5 - Lewisham North West	80,858	86,012	89,425	97,528	103,644	108,609
Zone 6 - Lewisham South West	73,736	75,476	76,335	77,346	78,776	80,119
Zone 7 - Lambeth South East	105,477	107,704	109,095	111,121	112,909	116,028
Zone 8 - Lambeth North East	100,307	106,826	110,915	119,208	123,436	126,735
Total	**649,726**	**678,703**	**696,227**	**728,818**	**752,237**	**773,820**

Source: GLA 2013 Round of Demographic Projections – Trend-based ward projections

Table 2: Food & Beverage Expenditure per person (£)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	1,214	1,264	1,349	1,438	1,534
Zone 2 - Southwark North East	1,324	1,379	1,471	1,569	1,674
Zone 3 - Southwark Central	988	1,029	1,098	1,171	1,249
Zone 4 - Southwark South	1,449	1,509	1,609	1,717	1,831
Zone 5 - Lewisham North West	1,250	1,301	1,388	1,481	1,580
Zone 6 - Lewisham South West	1,217	1,267	1,352	1,442	1,538
Zone 7 - Lambeth South East	1,370	1,427	1,522	1,624	1,732
Zone 8 - Lambeth North East	1,413	1,472	1,570	1,674	1,786

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 0.0% 2012-2013, 2.1% 2013-2014, 2.8% 2014-2015 and 1.3% from 2015

Table 3: Total Food & Beverage Expenditure (£m)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	94.78	102.63	115.99	130.28	142.34
Zone 2 - Southwark North East	98.74	106.61	120.12	130.64	143.95
Zone 3 - Southwark Central	86.05	91.24	101.18	111.19	120.78
Zone 4 - Southwark South	91.24	95.53	102.65	111.09	122.48
Zone 5 - Lewisham North West	107.49	116.38	135.39	153.48	171.56
Zone 6 - Lewisham South West	91.86	96.74	104.57	113.60	123.25
Zone 7 - Lambeth South East	147.57	155.66	169.13	183.32	200.95
Zone 8 - Lambeth North East	150.95	163.21	187.12	206.68	226.36
Total	**868.69**	**928.00**	**1,036.15**	**1,140.27**	**1,251.67**

Source: Tables 1 and 2

Table 4: Base Year 2014 Food & Beverage Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Southwark North West									
Elephant & Castle / Walworth Road	1.4%	0.6%	7.8%	0.0%	0.0%	0.0%	0.2%	0.7%	15.0%
Southwark/Bankside/Borough	6.8%	16.9%	0.0%	0.3%	0.5%	0.0%	0.1%	0.3%	15.0%
Zone 2 - Southwark North East									
London Bridge	8.2%	2.9%	2.5%	0.0%	0.2%	0.2%	0.6%	3.8%	50.0%
Surrey Quays/Canada Water/Rotherhithe	1.0%	24.0%	0.8%	0.6%	1.1%	0.0%	0.4%	2.3%	15.0%
The Blue	15.9%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.0%
Old Kent Road	0.4%	0.7%	0.2%	1.5%	0.8%	0.0%	0.0%	0.0%	10.0%
Zone 3 - Southwark Central									
Peckham	15.1%	4.0%	15.1%	3.6%	9.2%	1.6%	0.7%	0.3%	5.0%
Camberwell	2.4%	0.0%	11.2%	3.5%	0.0%	2.1%	2.5%	5.2%	5.0%
Nunhead	0.0%	4.1%	3.5%	0.0%	1.0%	0.0%	0.0%	0.0%	5.0%
Zone 4 - Southwark South									
Lordship Lane	0.6%	0.5%	14.3%	32.5%	1.6%	7.5%	1.0%	0.0%	5.0%
Herne Hill	0.0%	0.0%	3.6%	1.5%	0.9%	0.3%	2.4%	4.4%	5.0%
Dulwich Village	2.7%	0.0%	0.8%	8.9%	1.5%	1.3%	3.9%	0.0%	5.0%
LB Southwark Total	**54.5%**	**56.8%**	**59.8%**	**52.4%**	**16.8%**	**13.0%**	**11.8%**	**17.6%**	
Central London/West End	28.9%	20.0%	16.7%	30.5%	23.9%	19.1%	16.2%	50.9%	95.0%
Centres in LB Lambeth	8.7%	0.0%	3.1%	5.6%	6.4%	1.9%	32.3%	20.3%	60.0%
Centres in LB Lewisham	3.1%	0.6%	0.0%	0.5%	16.9%	21.2%	0.4%	0.0%	60.0%
Centres in LB Croydon	0.4%	0.0%	2.7%	0.0%	8.9%	2.1%	9.3%	0.0%	80.0%
Centres in LB Bromley	0.0%	0.3%	0.5%	5.0%	3.4%	16.0%	17.5%	0.0%	75.0%
Centres in RB Greenwich	0.0%	0.0%	0.3%	0.0%	0.5%	0.0%	0.0%	0.0%	99.0%
Other Outside	4.4%	22.3%	16.9%	6.0%	23.2%	26.7%	12.5%	11.2%	90.0%
Total Outside LB Southwark	**45.5%**	**43.2%**	**40.2%**	**47.6%**	**83.2%**	**87.0%**	**88.2%**	**82.4%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey August 2014

Table 5: Base Year 2014 Food & Beverage Expenditure (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	**94.78**	**98.74**	**86.05**	**91.24**	**107.49**	**91.86**	**147.57**	**150.95**		**868.69**
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	1.33	0.59	6.71	0.00	0.00	0.00	0.30	1.06	1.76	11.75
Southwark/Bankside/Borough	6.44	16.69	0.00	0.27	0.54	0.00	0.15	0.45	4.33	28.87
Zone 2 - Southwark North East										
London Bridge	7.77	2.86	2.15	0.00	0.21	0.18	0.89	5.74	19.81	39.61
Surrey Quays/Canada Water/Rotherhithe	0.95	23.70	0.69	0.55	1.18	0.00	0.59	3.47	5.49	36.62
The Blue	15.07	3.06	0.00	0.00	0.00	0.00	0.00	0.91	1.00	20.04
Old Kent Road	0.38	0.69	0.17	1.37	0.86	0.00	0.00	0.00	0.39	3.86
Zone 3 - Southwark Central										
Peckham	14.31	3.95	12.99	3.28	9.89	1.47	1.03	0.45	2.49	49.88
Camberwell	2.27	0.00	9.64	3.19	0.00	1.93	3.69	7.85	1.50	30.08
Nunhead	0.00	4.05	3.01	0.00	1.07	0.00	0.00	0.00	0.43	8.56
Zone 4 - Southwark South										
Lordship Lane	0.57	0.49	12.31	29.65	1.72	6.89	1.48	0.00	2.80	55.90
Herne Hill	0.00	0.00	3.10	1.37	0.97	0.28	3.54	6.64	0.84	16.73
Dulwich Village	2.56	0.00	0.69	8.12	1.61	1.19	5.76	0.00	1.05	20.98
LB Southwark Total	**51.65**	**56.08**	**51.46**	**47.81**	**18.06**	**11.94**	**17.41**	**26.57**	**41.89**	**322.88**
Central London/West End	27.39	19.75	14.37	27.83	25.69	17.54	23.91	76.83	4,432.99	4,666.30
Centres in LB Lambeth	8.25	0.00	2.67	5.11	6.88	1.75	47.67	30.64	154.44	257.39
Centres in LB Lewisham	2.94	0.59	0.00	0.46	18.17	19.47	0.59	0.00	63.32	105.54
Centres in LB Croydon	0.38	0.00	2.32	0.00	9.57	1.93	13.72	0.00	111.69	139.61
Centres in LB Bromley	0.00	0.30	0.43	4.56	3.65	14.70	25.83	0.00	148.40	197.86
Centres in RB Greenwich	0.00	0.00	0.26	0.00	0.54	0.00	0.00	0.00	78.77	79.56
Other Outside	4.17	22.02	14.54	5.47	24.94	24.53	18.45	16.91	1,179.21	1,310.24
Total Outside LB Southwark	**43.12**	**42.66**	**34.59**	**43.43**	**89.43**	**79.92**	**130.16**	**124.38**	**6,168.82**	**6,756.51**
TOTAL	**94.78**	**98.74**	**86.05**	**91.24**	**107.49**	**91.86**	**147.57**	**150.95**	**6,210.70**	**7,079.39**

Source: Tables 3 and 4

Table 6: Existing Food & Beverage Units/Floorspace 2014

Centre	Class A3	Class A4	Class A5	Total Units	Total Floorspace
Elephant & Castle/Walworth Road	35	15	22	72	10,150
Southwark/Bankside/Borough/London Bridge	60	33	18	111	16,380
Tower Bridge Road	7	4	3	14	1,360
Surrey Quays/Canada Water/Rotherhithe	17	5	13	35	7,240
The Blue	7	2	7	16	1,500
Old Kent Road	12	2	5	19	2,000
Peckham	20	5	22	47	7,080
Camberwell	30	7	13	50	6,410
Nunhead	1	3	9	13	867
Lordship Lane	27	8	6	41	5,020
Herne Hill	7	6	16	29	2,900
Dulwich Village	6	1	0	7	886
LB Southwark Total	**229**	**91**	**134**	**454**	**61,793**

Source: VOA and Goad

Table 7: Food & Beverage Expenditure 2016 (£m) – without commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**102.63**	**106.61**	**91.24**	**95.53**	**116.38**	**96.74**	**155.66**	**163.21**		**928.00**
Zone 1 - Southwark North West										
Elephant & Castle / Walworth Road	1.44	0.64	7.12	0.00	0.00	0.00	0.31	1.14	1.88	12.53
Southwark/Bankside/Borough	6.98	18.02	0.00	0.29	0.58	0.00	0.16	0.49	4.68	31.19
Zone 2 - Southwark North East										
London Bridge	8.42	3.09	2.28	0.00	0.23	0.19	0.93	6.20	21.35	42.70
Surrey Quays/Canada Water/Rotherhithe	1.03	25.59	0.73	0.57	1.28	0.00	0.62	3.75	5.92	39.50
The Blue	16.32	3.30	0.00	0.00	0.00	0.00	0.00	0.98	1.08	21.69
Old Kent Road	0.41	0.75	0.18	1.43	0.93	0.00	0.00	0.00	0.41	4.11
Zone 3 - Southwark Central										
Peckham	15.50	4.26	13.78	3.44	10.71	1.55	1.09	0.49	2.67	53.49
Camberwell	2.46	0.00	10.22	3.34	0.00	2.03	3.89	8.49	1.60	32.04
Nunhead	0.00	4.37	3.19	0.00	1.16	0.00	0.00	0.00	0.46	9.19
Zone 4 - Southwark South										
Lordship Lane	0.62	0.53	13.05	31.05	1.86	7.26	1.56	0.00	2.94	58.86
Herne Hill	0.00	0.00	3.28	1.43	1.05	0.29	3.74	7.18	0.89	17.87
Dulwich Village	2.77	0.00	0.73	8.50	1.75	1.26	6.07	0.00	1.11	22.19
LB Southwark Total	**55.93**	**60.55**	**54.56**	**50.06**	**19.55**	**12.58**	**18.37**	**28.73**	**45.01**	**345.34**
Central London/West End	29.66	21.32	15.24	29.14	27.81	18.48	25.22	83.08	4,748.87	4,998.81
Centres in LB Lambeth	8.93	0.00	2.83	5.35	7.45	1.84	50.28	33.13	164.71	274.51
Centres in LB Lewisham	3.18	0.64	0.00	0.48	19.67	20.51	0.62	0.00	67.65	112.75
Centres in LB Croydon	0.41	0.00	2.46	0.00	10.36	2.03	14.48	0.00	118.96	148.70
Centres in LB Bromley	0.00	0.32	0.46	4.78	3.96	15.48	27.24	0.00	156.69	208.92
Centres in RB Greenwich	0.00	0.00	0.27	0.00	0.58	0.00	0.00	0.00	84.70	85.56
Other Outside	4.52	23.77	15.42	5.73	27.00	25.83	19.46	18.28	1,260.08	1,400.09
Total Outside LB Southwark	**46.70**	**46.05**	**36.68**	**45.47**	**96.83**	**84.17**	**137.29**	**134.49**	**6,601.65**	**7,229.33**
TOTAL	**102.63**	**106.61**	**91.24**	**95.53**	**116.38**	**96.74**	**155.66**	**163.21**	**6,646.66**	**7,574.67**

Source: Tables 3 and 4

Table 8: Food & Beverage Commitments Floorspace

	Additional Gross Floorspace (sq.m)
Zone 1 - Southwark North West	
The Heygate Estate (1)	4,187
King's Reach Tower, Stamford Street (2)	1,480
One Blackfriars, Blackfriars Road (3)	526
Sea Containers House, Upper Ground (4)	512
127 Borough High Street (5)	193
4-10 Lamb Walk (6)	218
Castle Industrial Estate (7)	924
Zone 1 - Sub-Total	**8,040**
Zone 2 - Southwark North East	
Surrey Quays Shopping Centre Extension (8)	2,138
Decathlon (Sites C and E), Surrey Quays (9)	1,210
Zone 2 - Sub-Total	**3,348**
LB Southwark Total	**11,388**

(1) DP9 Retail Assessment assumed floorspace breakdown
(2) Planning Application - 3,701 sq.m gross increase A1 to A5 (assume 40% F&B)
(3) Planning Application - 1,316 sq.m gross increase A1 to A5 (assume 40% F&B)
(4) Planning Application - 1,281 sq.m gross increase A1 to A3 (assume 40% F&B)
(5) Planning Application - 482 sq.m gross increase A1 to A3 (assume 40% F&B)
(6) Planning Application - 873 sq.m gross increase A1 to A5/B1/D1 (assume 25% F&B)
(7) Planning Application - 924sq.m gross increase in A3
(8) 10,691 sq.m gross increase A1 to A5 (assume 20% F&B)
(9) Planning Application - increase of 4,035 sq.m in A1 to A4 (assume 30% F&B)

Table 9: Food and Beverage Commitments Turnover/Trade Draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments Trade Draw %	19%	43%	16%	1%	1%	0%	1%	4%	15%	100%
Zone 2 - Commitments Trade Draw %	3%	65%	2%	1%	3%	0%	2%	9%	15%	100%
Zone 1 - Commitments Turnover £m	7.79	17.64	6.56	0.41	0.41	0.00	0.41	1.64	6.15	41.01
Zone 2 - Commitments Turnover £m	0.51	11.10	0.34	0.17	0.51	0.00	0.34	1.54	2.56	17.08

Source: NEMS Household Survey August 2014. Sales floorspace of commitments at £5,101 per sq.m net

Table 10 Food and Beverage Expenditure 2016 (£m) - With commitments

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**102.63**	**106.61**	**91.24**	**95.53**	**116.38**	**96.74**	**155.66**	**163.21**		**928.00**
Zone 1 - Southwark North West										
Zone 1 - Commitments	7.79	17.64	6.56	0.41	0.41	0.00	0.41	1.64	6.15	41.01
Elephant & Castle / Walworth Road	1.28	0.43	6.33	0.00	0.00	0.00	0.31	1.11	1.88	11.34
Southwark/Bankside/Borough	6.22	12.06	0.00	0.28	0.57	0.00	0.15	0.48	4.67	24.44
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.51	11.10	0.34	0.17	0.51	0.00	0.34	1.54	2.56	17.08
London Bridge	7.73	2.32	2.09	0.00	0.23	0.19	0.93	6.07	21.32	40.90
Surrey Quays/Canada Water/Rotherhithe	0.91	17.12	0.65	0.57	1.26	0.00	0.62	3.65	5.91	30.70
The Blue	14.99	2.49	0.00	0.00	0.00	0.00	0.00	0.96	1.08	19.52
Old Kent Road	0.37	0.50	0.16	1.42	0.92	0.00	0.00	0.00	0.41	3.78
Zone 3 - Southwark Central										
Peckham	14.23	3.21	12.64	3.41	10.61	1.55	1.08	0.48	2.67	49.89
Camberwell	2.26	0.00	9.37	3.32	0.00	2.03	3.87	8.31	1.60	30.77
Nunhead	0.00	3.65	3.02	0.00	1.16	0.00	0.00	0.00	0.46	8.28
Zone 4 - Southwark South										
Lordship Lane	0.58	0.44	12.33	30.90	1.85	7.26	1.55	0.00	2.94	57.85
Herne Hill	0.00	0.00	3.10	1.43	1.04	0.29	3.72	7.08	0.89	17.56
Dulwich Village	2.62	0.00	0.69	8.46	1.74	1.26	6.05	0.00	1.11	21.92
LB Southwark Total	**59.51**	**70.96**	**57.29**	**50.37**	**20.31**	**12.58**	**19.04**	**31.32**	**53.66**	**375.03**
Central London/West End	27.24	16.03	13.98	28.93	27.57	18.48	25.08	81.36	4,742.34	4,981.00
Centres in LB Lambeth	8.32	0.00	2.63	5.32	7.39	1.84	50.04	32.56	164.52	272.63
Centres in LB Lewisham	2.97	0.51	0.00	0.47	19.52	20.51	0.62	0.00	67.57	112.17
Centres in LB Croydon	0.38	0.00	2.29	0.00	10.28	2.03	14.41	0.00	118.82	148.22
Centres in LB Bromley	0.00	0.25	0.42	4.75	3.93	15.48	27.11	0.00	156.51	208.46
Centres in RB Greenwich	0.00	0.00	0.25	0.00	0.58	0.00	0.00	0.00	84.61	85.44
Other Outside	4.21	18.86	14.36	5.70	26.80	25.83	19.37	17.97	1,258.63	1,391.72
Total Outside LB Southwark	**43.12**	**35.65**	**33.94**	**45.16**	**96.07**	**84.17**	**136.63**	**131.89**	**6,593.01**	**7,199.64**
TOTAL	**102.63**	**106.61**	**91.24**	**95.53**	**116.38**	**96.74**	**155.66**	**163.21**	**6,646.66**	**7,574.67**

Source: Tables 3, 6 and 9

Table 11: Food and Beverage Expenditure 2021 (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	**115.99**	**120.12**	**101.18**	**102.65**	**135.39**	**104.57**	**169.13**	**187.12**		**1,036.15**
Zone 1 - Southwark North West										
Zone 1 - Commitments	8.81	19.87	7.28	0.44	0.48	0.00	0.45	1.88	6.87	46.07
Elephant & Castle / Walworth Road	1.45	0.48	7.02	0.00	0.00	0.00	0.34	1.27	2.09	12.66
Southwark/Bankside/Borough	7.03	13.59	0.00	0.30	0.67	0.00	0.17	0.55	5.21	27.52
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.58	12.51	0.38	0.18	0.60	0.00	0.37	1.76	2.86	19.24
London Bridge	8.74	2.62	2.32	0.00	0.27	0.21	1.01	6.96	23.81	45.93
Surrey Quays/Canada Water/Rotherhithe	1.03	19.29	0.72	0.61	1.47	0.00	0.67	4.19	6.60	34.59
The Blue	16.94	2.80	0.00	0.00	0.00	0.00	0.00	1.10	1.21	22.05
Old Kent Road	0.41	0.56	0.18	1.52	1.07	0.00	0.00	0.00	0.46	4.21
Zone 3 - Southwark Central										
Peckham	16.09	3.61	14.02	3.67	12.35	1.67	1.18	0.55	2.98	56.11
Camberwell	2.56	0.00	10.40	3.57	0.00	2.20	4.20	9.53	1.79	34.24
Nunhead	0.00	4.11	3.35	0.00	1.35	0.00	0.00	0.00	0.51	9.32
Zone 4 - Southwark South										
Lordship Lane	0.66	0.50	13.67	33.20	2.15	7.84	1.68	0.00	3.28	63.00
Herne Hill	0.00	0.00	3.44	1.53	1.21	0.31	4.04	8.12	1.00	19.66
Dulwich Village	2.96	0.00	0.76	9.09	2.02	1.36	6.57	0.00	1.24	24.01
LB Southwark Total	**67.25**	**79.95**	**63.54**	**54.12**	**23.63**	**13.59**	**20.68**	**35.91**	**59.91**	**418.59**
Central London/West End	30.79	18.06	15.50	31.08	32.07	19.97	27.25	93.28	5,294.98	5,562.99
Centres in LB Lambeth	9.41	0.00	2.92	5.71	8.60	1.99	54.37	37.33	183.69	304.02
Centres in LB Lewisham	3.35	0.57	0.00	0.51	22.71	22.17	0.67	0.00	75.45	125.43
Centres in LB Croydon	0.43	0.00	2.54	0.00	11.96	2.20	15.66	0.00	132.67	165.46
Centres in LB Bromley	0.00	0.29	0.47	5.10	4.57	16.73	29.46	0.00	174.75	231.37
Centres in RB Greenwich	0.00	0.00	0.28	0.00	0.67	0.00	0.00	0.00	94.47	95.42
Other Outside	4.76	21.25	15.92	6.12	31.18	27.92	21.04	20.60	1,405.31	1,554.09
Total Outside LB Southwark	**48.74**	**40.17**	**37.64**	**48.53**	**111.76**	**90.97**	**148.45**	**151.21**	**7,361.31**	**8,038.79**
TOTAL	**115.99**	**120.12**	**101.18**	**102.65**	**135.39**	**104.57**	**169.13**	**187.12**	**7,421.22**	**8,457.37**

Source: Tables 3, 6 and 9

Table 12: Food and Beverage Expenditure 2026 (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	**130.28**	**130.64**	**111.19**	**111.09**	**153.48**	**113.60**	**183.32**	**206.68**		**1,140.27**
Zone 1 - Southwark North West										
Zone 1 - Commitments	9.89	21.61	8.00	0.48	0.54	0.00	0.48	2.08	7.56	50.64
Elephant & Castle / Walworth Road	1.63	0.52	7.72	0.00	0.00	0.00	0.36	1.41	2.30	13.94
Southwark/Bankside/Borough	7.90	14.78	0.00	0.33	0.76	0.00	0.18	0.60	5.74	30.28
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.65	13.60	0.42	0.20	0.68	0.00	0.40	1.95	3.15	21.04
London Bridge	9.81	2.85	2.55	0.00	0.30	0.23	1.09	7.69	26.20	50.73
Surrey Quays/Canada Water/Rotherhithe	1.16	20.98	0.79	0.66	1.67	0.00	0.73	4.62	7.27	37.88
The Blue	19.03	3.05	0.00	0.00	0.00	0.00	0.00	1.21	1.33	24.62
Old Kent Road	0.46	0.61	0.20	1.65	1.21	0.00	0.00	0.00	0.50	4.64
Zone 3 - Southwark Central										
Peckham	18.07	3.93	15.40	3.97	13.99	1.82	1.28	0.61	3.28	62.35
Camberwell	2.87	0.00	11.42	3.86	0.00	2.39	4.56	10.53	1.97	37.59
Nunhead	0.00	4.47	3.68	0.00	1.53	0.00	0.00	0.00	0.56	10.24
Zone 4 - Southwark South										
Lordship Lane	0.74	0.55	15.02	35.93	2.44	8.52	1.83	0.00	3.61	68.64
Herne Hill	0.00	0.00	3.78	1.66	1.37	0.34	4.38	8.97	1.10	21.60
Dulwich Village	3.33	0.00	0.84	9.84	2.29	1.48	7.12	0.00	1.36	26.26
LB Southwark Total	**75.54**	**86.95**	**69.82**	**58.57**	**26.78**	**14.77**	**22.42**	**39.66**	**65.93**	**460.45**
Central London/West End	34.58	19.65	17.03	33.64	36.36	21.70	29.53	103.03	5,827.10	6,122.61
Centres in LB Lambeth	10.56	0.00	3.21	6.18	9.75	2.16	58.93	41.24	202.15	334.18
Centres in LB Lewisham	3.76	0.62	0.00	0.55	25.75	24.08	0.73	0.00	83.03	138.53
Centres in LB Croydon	0.49	0.00	2.80	0.00	13.56	2.39	16.97	0.00	146.00	182.20
Centres in LB Bromley	0.00	0.31	0.52	5.52	5.18	18.18	31.93	0.00	192.31	253.94
Centres in RB Greenwich	0.00	0.00	0.31	0.00	0.76	0.00	0.00	0.00	103.96	105.03
Other Outside	5.34	23.11	17.50	6.62	35.34	30.33	22.81	22.75	1,546.53	1,710.34
Total Outside LB Southwark	**54.74**	**43.69**	**41.36**	**52.52**	**126.69**	**98.84**	**160.90**	**167.02**	**8,101.08**	**8,846.84**
TOTAL	**130.28**	**130.64**	**111.19**	**111.09**	**153.48**	**113.60**	**183.32**	**206.68**	**8,167.01**	**9,307.28**

Source: Tables 3, 6 and 9

Table 13: Food and Beverage Expenditure 2031 (£m)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	**142.34**	**143.95**	**120.78**	**122.48**	**171.56**	**123.25**	**200.95**	**226.36**		**1,251.67**
Zone 1 - Southwark North West										
Zone 1 - Commitments	10.81	23.81	8.69	0.53	0.60	0.00	0.53	2.28	8.30	55.54
Elephant & Castle / Walworth Road	1.78	0.58	8.38	0.00	0.00	0.00	0.40	1.54	2.53	15.21
Southwark/Bankside/Borough	8.63	16.28	0.00	0.36	0.85	0.00	0.20	0.66	6.30	33.28
Zone 2 - Southwark North East										
Zone 2 - Commitments	0.71	14.99	0.45	0.22	0.76	0.00	0.44	2.13	3.46	23.15
London Bridge	10.72	3.14	2.77	0.00	0.34	0.25	1.20	8.42	28.76	55.60
Surrey Quays/Canada Water/Rotherhithe	1.27	23.12	0.86	0.73	1.86	0.00	0.80	5.06	7.98	41.68
The Blue	20.79	3.36	0.00	0.00	0.00	0.00	0.00	1.33	1.46	26.93
Old Kent Road	0.51	0.67	0.21	1.82	1.36	0.00	0.00	0.00	0.55	5.13
Zone 3 - Southwark Central										
Peckham	19.74	4.33	16.73	4.38	15.64	1.97	1.40	0.67	3.60	68.46
Camberwell	3.14	0.00	12.41	4.26	0.00	2.59	5.00	11.53	2.16	41.07
Nunhead	0.00	4.93	3.99	0.00	1.71	0.00	0.00	0.00	0.62	11.24
Zone 4 - Southwark South										
Lordship Lane	0.81	0.60	16.32	39.61	2.73	9.24	2.00	0.00	3.97	75.28
Herne Hill	0.00	0.00	4.11	1.83	1.53	0.37	4.80	9.82	1.20	23.67
Dulwich Village	3.63	0.00	0.91	10.85	2.56	1.60	7.81	0.00	1.49	28.86
LB Southwark Total	**82.53**	**95.81**	**75.85**	**64.58**	**29.94**	**16.02**	**24.57**	**43.44**	**72.37**	**505.11**
Central London/West End	37.78	21.65	18.50	37.09	40.64	23.54	32.37	112.84	6,396.35	6,720.76
Centres in LB Lambeth	11.54	0.00	3.49	6.82	10.90	2.34	64.60	45.16	221.90	366.75
Centres in LB Lewisham	4.11	0.69	0.00	0.61	28.78	26.13	0.80	0.00	91.14	152.25
Centres in LB Croydon	0.53	0.00	3.04	0.00	15.16	2.59	18.60	0.00	160.27	200.18
Centres in LB Bromley	0.00	0.34	0.56	6.09	5.79	19.72	35.00	0.00	211.10	278.60
Centres in RB Greenwich	0.00	0.00	0.34	0.00	0.85	0.00	0.00	0.00	114.12	115.31
Other Outside	5.84	25.47	19.01	7.30	39.51	32.91	25.00	24.92	1,697.61	1,877.56
Total Outside LB Southwark	**59.81**	**48.14**	**44.93**	**57.90**	**141.62**	**107.23**	**176.38**	**182.92**	**8,892.48**	**9,711.41**
TOTAL	**142.34**	**143.95**	**120.78**	**122.48**	**171.56**	**123.25**	**200.95**	**226.36**	**8,964.85**	**10,216.52**

Source: Tables 3, 6 and 9

Table 14: Summary of Food and Beverage Expenditure 2014 to 2031

	2014	2016	2021	2026	2031
Available Expenditure in LB Southwark (£m)					
Zone 1 - Southwark North West	40.62	76.79	86.24	94.86	104.02
Zone 2 - Southwark North East	100.13	111.97	126.02	138.91	152.49
Zone 3 - Southwark Central	88.52	88.94	99.66	110.18	120.78
Zone 4 - Southwark South	93.61	97.33	106.66	116.50	127.81
Total	**322.88**	**375.03**	**418.59**	**460.45**	**505.11**
Turnover of Existing Facilities (£m)					
Zone 1 - Southwark North West	40.62	41.44	43.55	45.77	48.11
Zone 2 - Southwark North East	100.13	102.14	107.35	112.83	118.58
Zone 3 - Southwark Central	88.52	90.30	94.91	99.75	104.83
Zone 4 - Southwark South	93.61	95.49	100.36	105.48	110.86
Total	**322.88**	**329.37**	**346.17**	**363.83**	**382.39**
Turnover of Commitments (£m)					
Zone 1 - Southwark North West	0.00	41.01	43.10	45.30	47.61
Zone 2 - Southwark North East	0.00	17.08	17.95	18.86	19.83
Zone 3 - Southwark Central	0.00	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**58.09**	**61.05**	**64.17**	**67.44**
Surplus/Deficit Expenditure (£m)					
Zone 1 - Southwark North West	n/a	-5.66	-0.41	3.79	8.30
Zone 2 - Southwark North East	n/a	-7.25	0.72	7.22	14.08
Zone 3 - Southwark Central	n/a	-1.36	4.76	10.43	15.95
Zone 4 - Southwark South	n/a	1.84	6.30	11.01	16.95
Total	**n/a**	**-12.43**	**11.36**	**32.45**	**55.28**

Table 15: Food and Beverage Capacity 2014 to 2031

	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,101	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)					
Zone 1 - Southwark North West	n/a	-1,110	-77	673	1,402
Zone 2 - Southwark North East	n/a	-1,421	134	1,281	2,378
Zone 3 - Southwark Central	n/a	-267	888	1,851	2,693
Zone 4 - Southwark South	n/a	360	1,175	1,955	2,862
Total	**n/a**	**-2,437**	**2,120**	**5,760**	**9,336**

Appendix 5 Surrey Quays/Elephant & Castle Impact

Table 1: Comparison Goods Commitments Floorspace 2014 plus additional space at Surrey Quays and Elephant & Castle

Centre	Additonal Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1 - Southwark North West		
Elephant & Castle Redevelopment	17,500	13,125
The Heygate Estate (1)	9,063	6,797
Century House, Tanner Street (2)	1,840	1,380
King's Reach Tower, Stamford Street (3)	1,480	1,110
Brandon House, Borough High Street (4)	365	274
One Blackfriars, Blackfriars Road (5)	526	395
Sea Containers House, Upper Ground (6)	512	384
127 Borough High Street (7)	193	145
90-91 & 92 Blackfriars Road (8)	316	237
Former Elephant & Castle Swimming Pool (9)	388	291
4-10 Lamb Walk (10)	218	164
Castle Industrial Estate (11)	732	549
Eileen House (12)	144	108
Zone 1 - Sub-Total	**33,277**	**24,958**
Zone 2 - Southwark North East		
Surrey Quays Shopping Centre Extension (13)	25,038	18,779
Decathlon (Sites C and E), Surrey Quays (14)	6,800	5,440
Surrey Quays Leisure Park (15)	1,810	1,448
Zone 2 - Sub-Total	**33,648**	**25,667**
LB Southwark Total	**66,925**	**50,624**

Notes

(1) DP9 Retail Assessment assumed floorspace breakdown

(2) Planning Application - 3,680 sq.m gross A1 (assume 50% A1 comparison)

(3) Planning Application - 3,701 sq.m gross increase A1 to A5 (assume 40% A1 comparison)

(4) Planning Application - 1,460 sq.m gross increase A1/B1 (assume 25% A1 comparison)

(5) Planning Application - 1,316 sq.m gross increase A1 to A5 (assume 40% A1 comparison)

(6) Planning Application - 1,281 sq.m gross increase A1 to A3 (assume 40% A1 comparison)

(7) Planning Application - 482 sq.m gross increase A1 to A3 (assume 40% A1 comparison)

(8) Planning Application - 633 sq.m gross A1 (assume 50% A1 comparison)

(9) Planning Application - 776 sq.m gross A1 (assume 50% A1 comparison)

(10) Planning Application - 873 sq.m gross increase A1 to A5/B1/D1 (assume 25% A1 comparison)

(11) Planning Application - 732 sq.m gross increase A1 comparison

(12) Planning Application - 287 sq.m gross increase A1 (assume 50% comparison)

(13) 17,554 sq.m gross increase A1 comparsion space above committed

(14) Planning Application - 3,999 sq.m increase in Decathlon plus 4,035 sq.m in A1 to A4 (assume 70% A1 comparison)

(15) Planning Application - 1,810 sq.m gross net increase in A1

Table 2: Turnover and Trade Draw of Commitments, Surrey Quays and Elephant & Castle at 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments/Elephant & Castle Trade Draw %	34.0%	8.0%	14.0%	7.0%	1.0%	1.0%	1.0%	19.0%	15.0%	100.0%
Zone 2 - Commitments/30,000 sq.m at Surrey Quays Trade Draw %	6.0%	62.0%	4.0%	1.0%	7.0%	1.0%	0.0%	4.0%	15.0%	100.0%
Zone 1 - Commitments/Elephant & Castle Turnover £M	44.58	10.49	18.35	9.18	1.31	1.31	1.31	24.91	19.67	131.10
Zone 2 - Commitments/30,000 sq.m at Surrey Quays Turnover £M	8.09	83.59	5.39	1.35	9.44	1.35	0.00	5.39	20.22	134.83

Source: NEMS Household Survey August 2014. Sales floorspace of commitments/developments at £5,253 per sq.m net

Table 3: Summary of Comparison Goods Expenditure 2014 to 2031 - With Commitments and Surrey Quays/Elephant & Castle

	2014	2016	2021	2026	2031
Available Expenditure in Southwark (£m)					
Zone 1 - Southwark North West	100.73	217.29	260.68	317.94	385.62
Zone 2 - Southwark North East	344.73	424.68	509.98	619.47	754.16
Zone 3 - Southwark Central	118.96	115.14	137.26	166.96	203.13
Zone 4 - Southwark South	73.78	76.91	90.20	108.55	132.18
Total	**638.20**	**834.02**	**998.12**	**1,212.92**	**1,475.09**
Turnover of Existing Facilities (£m)					
Zone 1 - Southwark North West	100.73	105.83	119.74	135.47	153.27
Zone 2 - Southwark North East	344.73	362.18	409.77	463.62	524.55
Zone 3 - Southwark Central	118.96	124.98	141.40	159.99	181.01
Zone 4 - Southwark South	73.78	77.52	87.71	99.23	112.27
Total	**638.20**	**670.51**	**758.62**	**858.31**	**971.10**
Turnover of Commitments (£m)					
Zone 1 - Southwark North West	n/a	131.10	148.33	167.82	189.88
Zone 2 - Southwark North East	n/a	134.83	152.54	172.59	195.27
Zone 3 - Southwark Central	n/a	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	n/a	0.00	0.00	0.00	0.00
Total	**n/a**	**265.93**	**300.87**	**340.41**	**385.14**
Surplus/Deficit Expenditure (£m)					
Zone 1 - Southwark North West	n/a	-19.64	-7.39	14.65	42.47
Zone 2 - Southwark North East	n/a	-72.33	-52.34	-16.75	34.35
Zone 3 - Southwark Central	n/a	-9.84	-4.14	6.97	22.12
Zone 4 - Southwark South	n/a	-0.61	2.49	9.32	19.91
Total	**n/a**	**-102.42**	**-61.38**	**14.20**	**118.84**

Table 4: Comparison Goods Floorspace Expenditure Capacity 2014 to 2031 - adjusted for Surrey Quays/Elephant & Castle Expansion

	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,253	£5,943	£6,724	£7,608
Floorspace Requirement (sq.m net)					
Zone 1 - Southwark North West	n/a	-3,739	-1,243	2,178	5,582
Zone 2 - Southwark North East	n/a	-13,768	-8,807	-2,490	4,514
Zone 3 - Southwark Central	n/a	-1,873	-697	1,037	2,908
Zone 4 - Southwark South	n/a	-116	419	1,386	2,617
Total	**n/a**	**-19,497**	**-10,327**	**2,111**	**15,620**
Floorspace Requirement (sq.m gross)					
Zone 1 - Southwark North West	n/a	-4,985	-1,657	2,904	7,442
Zone 2 - Southwark North East	n/a	-18,358	-11,742	-3,320	6,019
Zone 3 - Southwark Central	n/a	-2,498	-929	1,383	3,877
Zone 4 - Southwark South	n/a	-155	559	1,848	3,489
Total	**n/a**	**-25,996**	**-13,770**	**2,815**	**20,827**

Table 5 Comparison Goods Cumulative Impact at 2021 - (commitments, Surrey Quays and Elephant & Castle)

Centre/Facility	Base year turnover 2014	Design year Turnover 2021 With No Development	Design year Turnover 2021 With Development	% Cumulative Impact 2021 With Development	% Change in Turnover 2014 to 2021
Zone 1 - Southwark North West					
Zone 1 commitments	n/a	n/a	74.58	n/a	n/a
Elephant & Castle / Walworth Road	83.64	109.75	170.25	55.1%	103.6%
Bankside & Borough	17.09	22.43	15.85	-29.4%	-7.3%
Zone 2 - Southwark North East					
London Bridge	5.70	7.52	6.94	-7.8%	21.8%
Surrey Quays/Canada Water	62.75	82.98	210.08	153.2%	234.8%
The Blue	11.17	14.83	11.00	-25.8%	-1.6%
Old Kent Road	265.11	346.34	281.96	-18.6%	6.4%
Zone 3 - Southwark Central					
Peckham	106.02	137.10	122.49	-10.7%	15.5%
Camberwell	9.50	12.23	10.68	-12.7%	12.4%
Nunhead	3.44	4.37	4.10	-6.3%	19.0%
Zone 4 - Southwark South					
Lordship Lane	30.53	38.24	36.89	-3.5%	20.8%
Herne Hill	15.81	20.20	19.77	-2.1%	25.0%
Dulwich Village	27.44	34.47	33.53	-2.7%	22.2%
LB Southwark Total	**638.20**	**830.47**	**998.12**		
Central London/West End	4,837.01	6,295.44	6,171.37	-2.0%	27.6%
Centres in LB Lambeth	423.62	546.22	533.56	-2.3%	26.0%
Centres in LB Lewisham	430.85	560.11	543.10	-3.0%	26.1%
Centres in LB Croydon	816.02	1,026.19	1,032.47	0.6%	26.5%
Centres in LB Bromley	509.35	642.55	642.94	0.1%	26.2%
Centres in RB Greenwich	224.19	286.89	286.03	-0.3%	27.6%
Other Outside	1,948.80	2,521.82	2,500.86	-0.8%	28.3%
Total Outside LB Southwark	**9,189.84**	**11,879.21**	**11,710.32**		

Table 6: Food & Beverage Commitments/Surrey Quays/Elephant & Castle Floorspace

Centre	Additonal Gross Floorspace (sq.m)
Zone 1 - Southwark North West	
Elephant & Castle Redevelopment	2,500
The Heygate Estate (1)	4,187
King's Reach Tower, Stamford Street (2)	1,480
One Blackfriars, Blackfriars Road (3)	526
Sea Containers House, Upper Ground (4)	512
127 Borough High Street (5)	193
4-10 Lamb Walk (6)	218
Castle Industrial Estate (7)	924
Zone 1 - Sub-Total	**10,540**
Zone 2 - Southwark North East	
Surrey Quays Shopping Centre Extension	3,522
Decathlon (Sites C and E), Surrey Quays (8)	1,210
Zone 2 - Sub-Total	**4,732**
LB Southwark Total	**15,272**

Notes

(1) DP9 Retail Assessment assumed floorspace breakdown

(2) Planning Application - 3,701 sq.m gross increase A1 to A5 (assume 40% F&B)

(3) Planning Application - 1,316 sq.m gross increase A1 to A5 (assume 40% F&B)

(4) Planning Application - 1,281 sq.m gross increase A1 to A3 (assume 40% F&B)

(5) Planning Application - 482 sq.m gross increase A1 to A3 (assume 40% F&B)

(6) Planning Application - 873 sq.m gross increase A1 to A5/B1/D1 (assume 25% F&B)

(7) Planning Application - 924sq.m gross increase in A3

(8) Planning Application - increase of 4,035 sq.m in A1 to A4 (assume 30% F&B)

Table 7: Food and Beverage Commitments, Surrey Quays and Elephant & Castle - Tunrover/Trade Draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Zone 1 - Commitments/Elephant & Castle Trade Draw %	19%	43%	16%	1%	1%	0%	1%	4%	15%	100%
Zone 2 - Commitments/Surrey Quays Trade Draw %	3%	65%	2%	1%	3%	0%	2%	9%	15%	100%
Zone 1 - Commitments?Elephant & Castle Turnover £M	10.22	23.12	8.60	0.54	0.54	0.00	0.54	2.15	8.06	53.76
Zone 2 - Commitments/Surrey Quays Turnover £M	0.72	15.69	0.48	0.24	0.72	0.00	0.48	2.17	3.62	24.14

Source: NEMS Household Survey August 2014. Sales floorspace of development at £5,101 per sq.m net

Table 8: Summary of Food and Beverage Expenditure 2014 to 2031 - With Surrey Quays and Elephant & Castle

	2014	2016	2021	2026	2031
Available Expenditure in LB Southwark (£m)					
Zone 1 - Southwark North West	40.62	88.89	99.83	109.81	120.41
Zone 2 - Southwark North East	100.13	113.27	127.48	140.51	154.26
Zone 3 - Southwark Central	88.52	86.84	97.31	107.57	117.93
Zone 4 - Southwark South	93.61	96.19	105.40	115.11	126.30
Total	**322.88**	**385.19**	**430.01**	**472.99**	**518.90**
Turnover of Existing Facilities (£m)					
Zone 1 - Southwark North West	40.62	41.44	43.55	45.77	48.11
Zone 2 - Southwark North East	100.13	102.14	107.35	112.83	118.58
Zone 3 - Southwark Central	88.52	90.30	94.91	99.75	104.83
Zone 4 - Southwark South	93.61	95.49	100.36	105.48	110.86
Total	**322.88**	**329.37**	**346.17**	**363.83**	**382.39**
Turnover of Commitments (£m)					
Zone 1 - Southwark North West	0.00	53.76	56.51	59.39	62.42
Zone 2 - Southwark North East	0.00	24.14	25.37	26.66	28.02
Zone 3 - Southwark Central	0.00	0.00	0.00	0.00	0.00
Zone 4 - Southwark South	0.00	0.00	0.00	0.00	0.00
Total	**0.00**	**77.90**	**81.88**	**86.05**	**90.44**
Surplus/Deficit Expenditure (£m)					
Zone 1 - Southwark North West	n/a	-6.31	-0.22	4.65	9.89
Zone 2 - Southwark North East	n/a	-13.01	-5.24	1.02	7.65
Zone 3 - Southwark Central	n/a	-3.46	2.40	7.82	13.09
Zone 4 - Southwark South	n/a	0.70	5.04	9.63	15.44
Total	**n/a**	**-22.08**	**1.97**	**23.12**	**46.07**

Table 9: Food and Beverage Capacity 2014 to 2031 - With Surrey Quays and Elephant & Castle

	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,101	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)					
Zone 1 - Southwark North West	n/a	-1,238	-42	825	1,670
Zone 2 - Southwark North East	n/a	-2,551	-978	181	1,292
Zone 3 - Southwark Central	n/a	-678	448	1,388	2,211
Zone 4 - Southwark South	n/a	138	939	1,708	2,607
Total	**n/a**	**-4,329**	**367**	**4,103**	**7,780**

Table 10: Food and Beverage Cumulative Impact 2021 - With Surrey Quays and Elephant & Castle

Centre/Facility	Base year turnover 2014	Design year turnover 2021 With No Development	Design year turnover 2021 With Development	% Cumulative Impact 2021	% Change in Turnover 2014 to 2021
Zone 1 - Southwark North West					
Zone 1 - Commitments	n/a	n/a	52.12	n/a	n/a
Elephant & Castle / Walworth Road	11.75	13.98	26.64	90.6%	126.9%
Southwark/Bankside/Borough	28.87	35.18	27.11	-22.9%	-6.1%
Zone 2 - Southwark North East					
London Bridge	39.61	48.26	43.43	-10.0%	9.6%
Surrey Quays/Canada Water/Rotherhithe	36.62	44.57	57.68	29.4%	57.5%
The Blue	20.04	24.52	22.30	-9.0%	11.3%
Old Kent Road	3.86	4.59	4.07	-11.4%	5.5%
Zone 3 - Southwark Central					
Peckham	49.88	60.18	54.04	-10.2%	8.3%
Camberwell	30.08	35.65	33.64	-5.6%	11.8%
Nunhead	8.56	10.34	9.63	-6.8%	12.5%
Zone 4 - Southwark South					
Lordship Lane	55.90	64.03	62.09	-3.0%	11.1%
Herne Hill	16.73	20.01	19.47	-2.7%	16.4%
Dulwich Village	20.98	24.28	23.83	-1.8%	13.6%
LB Southwark Total	**322.88**	**385.57**	430.01		
Central London/West End	4,666.30	5,614.49	5,556.18	-1.0%	19.1%
Centres in LB Lambeth	257.39	305.61	303.40	-0.7%	17.9%
Centres in LB Lewisham	105.54	126.39	125.21	-0.9%	18.6%
Centres in LB Croydon	139.61	165.85	165.31	-0.3%	18.4%
Centres in LB Bromley	197.86	227.72	231.20	1.5%	16.8%
Centres in RB Greenwich	79.56	98.05	95.38	-2.7%	19.9%
Other Outside	1,310.24	1,565.77	1,550.68	-1.0%	18.4%

Appendix 6 Cinema Capacity

Table 1: Study Area Population – Baseline Projections

Zone	2011	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	71,317	78,072	81,182	86,015	90,566	92,762
Zone 2 - Southwark North East	69,747	74,564	77,308	81,658	83,258	86,000
Zone 3 - Southwark Central	85,282	87,070	88,648	92,158	94,940	96,684
Zone 4 - Southwark South	63,002	62,979	63,319	63,784	64,708	66,883
Zone 5 - Lewisham North West	80,858	86,012	89,425	97,528	103,644	108,609
Zone 6 - Lewisham South West	73,736	75,476	76,335	77,346	78,776	80,119
Zone 7 - Lambeth South East	105,477	107,704	109,095	111,121	112,909	116,028
Zone 8 - Lambeth North East	100,307	106,826	110,915	119,208	123,436	126,735
Total	**649,726**	**678,703**	**696,227**	**728,818**	**752,237**	**773,820**

Source: GLA 2013 Round of Demographic Projections – Trend-based ward projections

Table 2: Total Number of Cinema Trips (per annum)

Zone	2014	2016	2021	2026	2031
Zone 1 - Southwark North West	218,602	227,310	240,842	253,585	259,734
Zone 2 - Southwark North East	208,779	216,462	228,642	233,122	240,800
Zone 3 - Southwark Central	243,796	248,214	258,042	265,832	270,715
Zone 4 - Southwark South	176,341	177,293	178,595	181,182	187,272
Zone 5 - Lewisham North West	240,834	250,390	273,078	290,203	304,105
Zone 6 - Lewisham South West	211,333	213,738	216,569	220,573	224,333
Zone 7 - Lambeth South East	301,571	305,466	311,139	316,145	324,878
Zone 8 - Lambeth North East	299,113	310,562	333,782	345,621	354,858
Total	**1,900,368**	**1,949,436**	**2,040,690**	**2,106,264**	**2,166,696**

Sources:

Table 1

Assumes 2.8 cinema trips per person per annum (NLP CineScope)

Table 3: Base Year 2014 Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Southwark	54.8%	59.2%	56.0%	33.5%	43.6%	46.6%	5.6%	24.0%	10.0%
Greenwich	29.0%	14.3%	5.9%	10.3%	36.2%	20.4%	4.5%	0.0%	n/a
West India Quay	0.0%	18.4%	0.0%	0.0%	0.8%	0.0%	0.0%	0.9%	n/a
Central London	8.3%	1.4%	1.9%	5.0%	4.1%	8.1%	4.2%	28.5%	n/a
Brixton	1.6%	0.0%	4.9%	35.2%	2.9%	5.3%	41.7%	20.1%	n/a
Other	6.3%	6.7%	31.3%	16.0%	12.4%	19.6%	44.0%	26.5%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey August 2014

Table 4: Base Year 2014 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2014	**218,602**	**208,779**	**243,796**	**176,341**	**240,834**	**211,333**	**301,571**	**299,113**		**1,900,368**
Southwark	119,794	123,597	136,526	59,074	105,003	98,481	16,888	71,787	81,239	812,390
Greenwich	63,394	29,855	14,384	18,163	87,182	43,112	13,571	0	n/a	269,661
West India Quay	0	38,415	0	0	1,927	0	0	2,692	n/a	43,034
Central London	18,144	2,923	4,632	8,817	9,874	17,118	12,666	85,247	n/a	159,421
Brixton	3,498	0	11,946	62,072	6,984	11,201	125,755	60,122	n/a	281,577
Other	13,772	13,988	76,308	28,215	29,863	41,421	132,691	79,265	n/a	415,524
Total	**218,602**	**208,779**	**243,796**	**176,341**	**240,834**	**211,333**	**301,571**	**299,113**	**n/a**	**1,981,607**

Source: Tables 2 and 3

Table 5: Future Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Southwark (existing)	47.3%	51.7%	51.0%	26.5%	41.1%	39.1%	3.1%	21.5%	10.0%
Southwark (potential)	15.0%	15.0%	10.0%	15.0%	5.0%	10.0%	5.0%	5.0%	5.0%
Other	37.7%	33.3%	39.0%	58.5%	53.9%	50.9%	91.9%	73.5%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey August 2014 and NLP assumptions

Table 6: 2016 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2016	**227,310**	**216,462**	**248,214**	**177,293**	**250,390**	**213,738**	**305,466**	**310,562**		**1,949,436**
Southwark (existing)	107,517	111,911	126,589	46,983	102,910	83,572	9,469	66,771	72,858	728,581
Southwark (potential)	34,096	32,469	24,821	26,594	12,520	21,374	15,273	15,528	9,615	192,290
Other	85,696	72,082	96,804	103,717	134,960	108,793	280,723	228,263	n/a	1,111,037
Total	**227,310**	**216,462**	**248,214**	**177,293**	**250,390**	**213,738**	**305,466**	**310,562**	**n/a**	**2,031,908**

Source: Tables 2 and 5

Table 7: 2021 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2021	**240,842**	**228,642**	**258,042**	**178,595**	**273,078**	**216,569**	**311,139**	**333,782**		**2,040,690**
Southwark (existing)	113,918	118,208	131,602	47,328	112,235	84,678	9,645	71,763	76,598	765,975
Southwark (potential)	36,126	34,296	25,804	26,789	13,654	21,657	15,557	16,689	10,030	200,603
Other	90,797	76,138	100,637	104,478	147,189	110,234	285,937	245,330	n/a	1,160,739
Total	**240,842**	**228,642**	**258,042**	**178,595**	**273,078**	**216,569**	**311,139**	**333,782**	**n/a**	**2,127,318**

Source: Tables 2 and 5

Table 8: 2026 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2026	**253,585**	**233,122**	**265,832**	**181,182**	**290,203**	**220,573**	**316,145**	**345,621**		**2,106,264**
Southwark (existing)	119,946	120,524	135,574	48,013	119,274	86,244	9,801	74,308	79,298	792,982
Southwark (potential)	38,038	34,968	26,583	27,177	14,510	22,057	15,807	17,281	10,338	206,760
Other	95,601	77,630	103,674	105,992	156,420	112,272	290,537	254,031	n/a	1,196,157
Total	**253,585**	**233,122**	**265,832**	**181,182**	**290,203**	**220,573**	**316,145**	**345,621**	**n/a**	**2,195,900**

Source: Tables 2 and 5

Table 9: 2031 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2031	**259,734**	**240,800**	**270,715**	**187,272**	**304,105**	**224,333**	**324,878**	**354,858**		**2,166,696**
Southwark (existing)	122,854	124,494	138,065	49,627	124,987	87,714	10,071	76,294	81,567	815,674
Southwark (potential)	38,960	36,120	27,072	28,091	15,205	22,433	16,244	17,743	10,625	212,492
Other	97,920	80,186	105,579	109,554	163,913	114,186	298,563	260,821	n/a	1,230,721
Total	**259,734**	**240,800**	**270,715**	**187,272**	**304,105**	**224,333**	**324,878**	**354,858**	**n/a**	**2,258,888**

Source: Tables 2 and 5

Table 10: Cinema Screen Capacity 2014 to 2031

	2014	2016	2021	2026	2031
Total Cinema Trips attracted to Southwark (per annum)	812,390	920,871	966,579	999,743	1,028,167
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	17	20	21	21	22
Existing and Proposed Screens in Southwark	16	23	23	23	23
Southwark Screen Capacity	1	-3	-2	-2	-1

Appendix 7 Audit of Centres

A. Peckham Town Centre

Peckham town centre is the main shopping and commercial centre in the London Borough of Southwark. It is designated a *Major Centre* in the London Plan. It has a reasonably large number of retail and service uses and has a wider catchment across the borough than the smaller centres. Its key roles include:

- *convenience shopping* – including Morrison's and Asda food stores and a Lidl supported by a large range of independent bakers, butchers, fishmongers, health food shop, newsagents and sweet shops. The convenience facilities in Peckham serve main food and top up shopping trips for visitors;
- *comparison shopping* - a good range of comparison shops, with a high proportion of independent shops selling a range of mainly lower order comparison goods. There is a reasonable selection of multiples, mainly located within and in close proximity to the Aylesham shopping centre;
- *services* – including a good range of high street national banks and independent cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours;
- *entertainment* – including several pubs and bars and a cinema; and
- *community facilities* – including a careers centre, public library, medical centres, library, council offices and community halls.

Mix of Uses and Retailer Occupation

Peckham town centre has a total of 384 retail/service uses. The diversity of uses present in Peckham town centre in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1 Peckham Town Centre Use Class Mix by Unit

Type of Unit	Units 2009	Units 2013	% of Total Number of Units	
			Peckham %	UK Average (1)
Comparison Retail	123	131	34.1	36.0
Convenience Retail	82	81	21.1	8.1
A1 Services (2)	144	60	15.6	14.1
A2 Services (3)		28	7.3	12.1
A3/A5		42	10.9	14.7
A4 Pubs/bar	-	5	1.3	2.9
Vacant	34	37	9.7	12.1
Total	**383**	**384**	**100.0**	**100.0**

Source: 2009 GVA Retail Study and Experian Goad 2013.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

The number of retail/ service units within Peckham has remained stable since 2009, increasing by just one. The proportion of convenience retail units is significantly higher than the national average, with a large number of small independent convenience retailers located throughout the centre. The proportion of comparison retail units within the centre is around the national average which reflects the centre's role as the main comparison shopping destination in the borough. The proportion of Class A3 restaurants/cafés (see also Table A.3) and A2 financial services is below the national average. The proportion of A1 services is above. Positively, the vacancy rate is only 9.7% which is lower than the national average reflecting a vital and viable centre.

Retailer Representation

Peckham town centre has a good selection of comparison shops (131) reflecting its size and role in the shopping hierarchy. Table A.2 provides a breakdown of comparison shop units by category.

Table A.2 Peckham Town Centre Breakdown of Comparison Units

Type of Unit	Peckham		% UK Average*
	Units 2013	%	
Clothing and footwear	37	28.2	25.0
Furniture, carpets and textiles	10	7.6	7.4
Booksellers, arts, crafts and stationers	9	6.9	10.6
Electrical, gas, music and photography	22	16.8	9.4
DIY, hardware and homewares	9	6.9	6.4
China, glass, gifts and fancy goods	2	1.5	4.6
Cars, motorcycles and motor access	4	3.1	1.3
Chemists, drug stores and opticians	21	16.0	10.0
Variety, department and catalogue	2	1.5	1.6
Florists, nurserymen and seedsmen	1	0.8	2.3
Toys, hobby, cycle and sport	6	4.6	5.2
Jewellers	3	2.3	5.0
Charity, second-hand shops	3	2.3	8.4
Other comparison retailers	2	1.5	2.9
Total	**131**	**100**	**100.0**

Source: Experian Goad 2013
*UK average for all town centres surveyed by Goad Plans (March, 2014)

The number of comparison retail units within Peckham has increased by 8 units since 2009 (Table A.1). All Goad Plan comparison categories are represented within the centre, although the range of units within some categories is much higher than others. Of the categories represented, there is a good choice of clothing and footwear shops, furniture/carpets, electrical shops and chemists/opticians. The proportion of charity shops is lower than the national average.

Major national multiple comparison retailers present in the town centre include: WH Smiths, Boots, Superdrug, Argos, JD Sport and Mothercare.

The centre also has various market stalls located along Rye Lane, Atwell Road, Blenheim Grove, Choumert Road and Highshore Road in operation throughout the week.

Service Uses

Peckham town centre has a good range of non-retail service uses, with all categories present (see Table A.3). The number of retail service units has decreased by 9 units since 2009 (Table A.1).

Table A.3 Peckham Town Centre Analysis of Selected Service Uses

Type of Unit	Peckham		% UK Average*
	Units 2013	%	
Restaurants/cafés	20	15.6	23.3
Fast food/takeaways	22	17.2	15.2
Pubs/bars	5	3.9	7.6
Banks/other financial services	14	10.9	12.9
Betting shops/casinos	10	7.8	4.0
Estate agents/valuers	4	3.1	9.5
Travel agents	2	1.6	2.5
Hairdressers/beauty parlours	48	37.5	22.9
Laundries/dry cleaners	3	2.4	2.2
Sub- Total	**128**	**100**	**100.0**
Other A1 Services	7	n/a	n/a
Total	**135**	**n/a**	**n/a**

Source: Experian Goad, 2013

*UK average for all town centres surveyed by Goad Plans (March, 2014)

The centre has a very high proportion of hairdressers and beauty parlours and a higher proportion of hot food takeaways and betting shops when compared with the national average. Most of the main high street banks/building societies are represented within Peckham town centre. The proportion of restaurants and cafes is below the national average.

Vacant Units

There are 37 vacant retail units within Peckham town centre, a vacancy rate of 9.2% which is below the Goad national average of 12.1%. The vacant units are dispersed throughout the centre.

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The diversity of the retail offer, which caters to niche tastes, was noted as a positive feature of the high street as it caters to the needs of the local community. Some respondents noted that the pavement [on Rye Lane] was too narrow for mothers with push chairs and wheelchair users. One respondent considered that too many pubs had closed down.

Many respondents supported extensive refurbishment of the high street to enhance the value of the town centre's architectural heritage. The history of the area and the architecture is not apparent and there is a need for more complementarity between street level and the heritage of the buildings they inhabit. Many respondents identified a high prevalence of unpopular uses including betting shops, butchers and nail salons.

Respondents supported the provision of open air market pitches. However, some respondents argued there is a need to consolidate the open air markets into one location. Many responses also cited a need for public toilets in the town centre.

Peckham's Strengths and Weaknesses

Strengths

- There is a good selection of convenience retailing, with a main food supermarket (Morrisons) and discount retailers (Lidl and Iceland) along with a large range of independent retailers located throughout the centre.
- There is a good selection of clothing and footwear stores within Peckham.
- The centre as a whole provides a reasonable range of national multiple and independent comparison retailers.
- The market stalls further add to the choice of retail provision within the centre.
- The centre's vacancy rate is lower than the national average.
- The centre has good public transport links both within the borough and central London.
- A number of the retailer services units and shops along Rye Lane are open relatively late which adds activity to the street scene.
- There is a multiplex cinema within Peckham.
- 26% of respondents to the household survey stated they considered Peckham to have a good range of shops

Weaknesses

- Narrow footpaths and street clutter/furniture/market stalls along some of the streets make the area feel crowded and detract from the visual appearance of the centre and restrict movement.
- The centre is fairly extensive and pedestrian navigation can be difficult.
- The quality of some shopfronts is poor, detracting from the amenity of the area.
- The centre has a relatively low proportion of food and beverage uses. The evening economy could be improved.
- When asked what they disliked about Peckham, 7% of respondents to the household survey said they disliked the lack of maintenance/ cleanliness.
- The ROI surrey "Understanding Perceptions of Southwark Town Centres February 2014" indicated Peckham has a lower proportion (39%) of affluent/financially comfortable customers than the London average (61%).

- The ROI survey suggests Peckham has a low average weekend spend, £27 compared with over £30 in most centres).
- Many (76%) of ROI survey respondents would like less betting shops and payday loan shops.

B. Elephant & Castle

Elephant & Castle is designated a District Centre within the London Plan. It is located to the north of the borough. The majority of units are located within the purpose built shopping centre. Elephant & Castle is defined as a major centre by LB Southwark and this comprises two elements: the shopping centre and surrounding streets, and Walworth Road. We deal with each part separately. The centre includes:

- *convenience shopping* – including a Tesco Metro and Iceland, supported by a bakers, newsagents and off licence. The convenience facilities in Elephant & Castle serve top up shopping trips for visitors;
- *comparison shopping* - a good range of comparison shops, with a high proportion of independent shops selling a range of mainly lower order comparison goods;
- *services* – including a good range of independent cafés, restaurants, takeaways and hairdressers/beauty parlours;
- *entertainment* – including several pubs, a bowling alley and theatre; and
- *community facilities* –including medical centres and places of worship.

Mix of Uses and Occupier Representation

Elephant & Castle has a total of 93 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Elephant & Castle Use Class Mix by Unit

Type of Unit	Units 2009	Units 2013	% of Total Number of Units	
			Elephant & Castle %	UK Average (1)
Comparison Retail	32	33	35.5	36.0
Convenience Retail	11	12	12.9	8.1
A1 Services (2)	52	8	8.6	14.1
A2 Services (3)		11	11.8	12.1
A3/A5		21	22.6	14.7
A4 pubs/bar		4	4.3	2.9
Vacant	9	4	4.3	12.1
Total	**104**	**93**	**100.0**	**100.0**

Source: 2009 GVA Retail Study and Experian Goad 2013.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The number of units in the centre has reduced by nine since 2009. This is likely to be down to the amalgamation of retail units to provide large units to serve retailers. The centre has a similar proportion of comparison units and higher proportion of convenience units when compared with the national average. The proportion of A3/A5 service units is higher than the average, but the proportion of A1 and A2 service units is lower. The vacancy rate of this centre is low at 4.3%, indicating a healthy, vital and viable centre.

Retailer Representation

Elephant & Castle has a reasonable selection of comparison shops (33). Table B.2 provides a breakdown of comparison shop units by category. The centre provides most, but not all, of the Goad Plan comparison categories and the choice available in each is low. The choice of booksellers/stationers and electrical shops is very good. There is a low choice of clothing and footwear stores. In addition to the retail units within the shopping centre and along Rockingham and New Kent Road, Elephant & Castle has its own market selling a range of comparison goods.

Table B.2 Elephant & Castle Breakdown of Comparison Units

Type of Unit	Elephant & Castle		% UK Average*
	Units 2013	%	
Clothing and footwear	6	18.2	25.0
Furniture, carpets and textiles	2	6.1	7.4
Booksellers, arts, crafts and stationers	9	27.3	10.6
Electrical, gas, music and photography	5	15.1	9.4
DIY, hardware and homewares	2	6.1	6.4
China, glass, gifts and fancy goods	1	3.0	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	3	9.1	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	1	3.0	5.2
Jewellers	2	6.1	5.0
Charity/second-hand	1	3.0	8.4
Other comparison retailers	1	3.0	2.9
Total	**33**	**100.0**	**100.0**

Source: Experian Goad 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Elephant & Castle has a good range of service uses, as shown in Table B3.

Table B.3 Elephant & Castle Analysis of Selected Service Uses

Type of Unit	Elephant & Castle		% UK Average*
	Units 2013	%	
Restaurants/cafés	15	35.8	23.3
Fast food/takeaways	6	14.3	15.2
Pubs/bars	4	9.5	7.6
Banks/other financial services	6	14.3	12.9
Betting shops/casinos	3	7.1	4.0
Estate agents/valuers	2	4.7	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	5	11.9	22.9
Laundries/dry cleaners	1	2.4	2.2
Total	**42**	**100.0**	**100.0**
Other A1 Retail Service	2	n/a	n/a
Total	**44**	**n/a**	**n/a**

Source: Experian Goad, 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

All categories apart from travel agents are present. Not all categories are well represented (see Table B.3). There is a very good range of restaurant and cafés.

Vacant Units

There are four vacant retail units within Elephant & Castle giving a vacancy rate of 4.3%, significantly below the national average of 12.1%. The vacant units are dispersed through the centre, two are in the shopping centre itself.

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Some of the buildings around Elephant & Castle, such as the original shopping centre, were considered to look very dated and in a poor condition. However, some respondents valued the shopping centre for its diverse retail and service offer.

Summary of Elephant & Castle's Strengths and Weaknesses

Strengths

- The centre has a low vacancy rate which confirms that demand for units is stable.
- There is a good selection of food and drink units.
- Investment into the centre is planned.
- The shopping centre is pedestrainised which eases pedestrian movement.
- The market enhances the range of retail offer available to customers.
- Access to the centre is excellent by public transport, with the centre benefiting from a main line railway station, underground station and served by a wide range of bus routes.
- 29% of respondents to the household survey liked how close and convenient to their home the centre is.

Weaknesses

- The retail units outside the shopping centre are on busy main roads which can prohibit pedestrian movement.
- There is little public realm within the centre to enhance its overall attractiveness.
- The environmental quality of the centre is poor. Little investment has been made on the basis that significant investment is due in the longer term.
- When asked what they disliked about Elephant & Castle, 8% of respondents to the household survey stated they did not like the shopping environment.

C. Walworth Road

Walworth Road is designated a District Centre within the London Plan. It is located towards the north of the borough. Along with Elephant & Castle Shopping Centre if forms part of Elephant & Castle Major Centre. It is a linear road with retail units on both sides. The centre includes:

- *convenience shopping* – including a Morrisons Supermarket, two Tesco Express stores, Iceland and an M&S food hall. The convenience stores are supported by a range of independent stores, bakers, butchers, fishmongers and off licences. The convenience facilities along Walworth Road serve main food and top up shopping trips for visitors;
- *comparison shopping* - a good range of comparison shops, with a reasonable mix of national multiple retailers, including Marks & Spencer, and a high proportion of independent shops selling a range of mainly lower order comparison goods;
- *services* – including a good range of independent cafés, restaurants, takeaways and hairdressers/beauty parlours;
- *entertainment* – including several pubs; and
- *community facilities* – including medical centres, places of worship and library.

Mix of Uses and Occupier Representation

Walworth Road has a total of 273 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Walworth Road Use Class Mix by Unit

Type of Unit	Units 2009	Units 2012	% of Total Number of Units	
			Walworth Road %	UK Average (1)
Comparison Retail	127	103	37.7	36.0
Convenience Retail	39	41	15.0	8.1
A1 Services (2)	121	46	16.9	14.1
A2 Services (3)		18	6.6	12.1
A3/A5		36	13.2	14.7
A4 pubs/bars		9	3.3	2.9
Vacant	16	20	7.3	12.1
Total	**303**	**273**	**100.0**	**100.0**

Source: 2009 GVA Retail Study and Experian Goad 2012

(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The number of retail units has declined by 30 units since 2009. There have been some infill developments, which may explain the loss of some of these uses, together with the ad hoc loss of retail units to residential uses. The centre's mix of units is broadly similar to the national average although it has a far higher proportion of convenience units. The proportion of A1 units is lower than the national average. The vacancy rate of this centre is lower than the national average at 7.3%, which reflects a vital and viable centre and suggests demand for units in this centre is strong.

Retailer Representation

Walworth Road has a good selection of comparison shops (103). Table C.2 provides a breakdown of comparison shop units by category. The centre does not provide any shops within the florist goods categories. The choice of clothing/footwear, furniture/carpet and electrical shops is very good. The proportion of charity shops is below the national average.

Table C.2 Walworth Road Breakdown of Comparison Units

Type of Unit	Walworth Road		% UK Average*
	Units 2012	%	
Clothing and footwear	22	21.4	25.0
Furniture, carpets and textiles	11	10.7	7.4
Booksellers, arts, crafts and stationers	8	7.8	10.6
Electrical, gas, music and photography	15	14.6	9.4
DIY, hardware and homewares	10	9.6	6.4
China, glass, gifts and fancy goods	2	1.9	4.6
Cars, motorcycles and motor access	3	2.9	1.3
Chemists, drug stores and opticians	12	11.7	10.0
Variety, department and catalogue	2	1.9	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	7	6.8	5.2
Jewellers	5	4.9	5.0
Charity/second-hand	5	4.9	8.4
Other comparison retailers	1	0.9	2.9
Total	**103**	**100.0**	**100.0**

Source: Experian Goad, 2012 *UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Walworth Road has a reasonable range of service uses reflecting the size of Walworth Road and its service role in the shopping hierarchy, as shown in Table C.3.

The proportion of restaurants and cafés is below the national average, but the proportion of hot food takeaways is slightly above. The proportion of betting shops is twice the national average. There is a very high proportion of beauty salons.

Table C.3 Walworth Road Analysis of Selected Service Uses

Type of Unit	Walworth Road		% UK Average*
	Units 2012	%	
Restaurants/cafés	20	20.0	23.3
Fast food/takeaways	16	16.0	15.2
Pubs/bars	9	9.0	7.6
Banks/other financial services	9	9.0	12.9
Betting shops/casinos	8	8.0	4.0
Estate agents/valuers	1	1.0	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	33	33.0	22.9
Laundries/dry cleaners	4	4.0	2.2
Total		**100.0**	**100.0**
Other A1 Retail Services	9	n/a	n/a
Total	**100**	**n/a**	**n/a**

Source: Experian Goad, 2012. *UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There are 20 vacant retail units within Walworth Road, giving a vacancy rate of just 7.3%, significantly below the national average of 12.1%. The vacant units are dispersed through the centre.

The New Southwark Plan: Interim Consultation Report Responses

Respondents tended to identify Walworth Road as having an unkempt appearance and being in a poor condition. Many respondents valued the open air market on East Street because it provides lower cost goods. However, many respondents also criticised the appearance of the market and suggested it should be improved. Many high street users supported the designation of additional market stall pitches on East Street.

Pay-day-loan units were considered a particular problem, as were the prevalence of nail salons. Many respondents identified that cleanliness was an issue and considered the installation of more bins could help to solve the issue. Respondents were unsatisfied with current crossing opportunities which provoke a high number of dangerous unauthorised crossings. Provision of public toilets was also cited as a necessity.

Summary of Walworth Road's Strengths and Weaknesses

Strengths

- The centre has a low vacancy rate which signals a vital and viable town centre.
- There is a good range of comparison retailers, with most categories represented. Whilst national multiples are limited, the centre includes a Marks & Spencer.
- The centre is well served by a number of bus routes and is in close proximity to Elephant & Castle transport links.

- There is a very good convenience offer within the centre, meeting both main food and convenience shopping needs.
- 30% of respondents to the household survey said the centre had a good range of shops.
- The ROI surrey "Understanding Perceptions of Southwark Town Centres February 2014" suggests Walworth Road has a high average weekend spend, when compared with other centres in the Borough.

Weaknesses

- Many shopfronts are run down and could benefit from some investment to enhance the environmental quality.
- There is little in the way of public realm.
- The centre is focused along a linear main busy road which can prohibit pedestrian movement.
- 8% of respondents to the household survey said the centre had a problem with traffic/congestion.
- The ROI surrey "indicated Walworth has a lower proportion (40%) of affluent/financially comfortable customers than the London average (61%).
- Many (64%) of ROI survey respondents would like less betting shops and payday loan shops.

D. Canada Water

Canada Water is one of Southwark's three major town centres. It is designated a District Centre within the London Plan. It is located to the east of the borough and includes Surrey Quays Shopping Centre.

Mix of Uses and Occupier Representation

Canada Water has a total of 135 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table D.1, compared against the national average.

Table D.1 Canada Water Use Class Mix by Unit

Type of Unit	Units 2012	% of Total Number of Units	
		Canada Water %	UK Average [1]
Comparison Retail	47	34.8	36.0
Convenience Retail	9	6.7	8.1
A1 Services [2]	21	15.6	14.1
A2 Services [3]	16	11.9	12.1
A3/A5	30	22.2	14.7
A4 pubs/bar	5	3.7	2.9
Vacant	7	5.1	12.1
Total	**135**	**100.0**	**100.0**

Source: Experian Goad 2012
(1) UK average for all town centres surveyed by Goad Plans (2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units shows that representation of comparison retailers is roughly in line with the national average. All other categories are roughly in line with the national average, apart from a significantly higher proportion of A3/A5 uses and a significantly lower proportion of vacant units. At 5.1% the vacancy rate is much lower than the national average which reflects a vital and viable centre.

Retailer Representation

Canada Water has a good selection of comparison shops (47). Table D.2 provides a breakdown of comparison shop units by category.

The centre provides all of the Goad Plan comparison categories, apart from furniture/carpets and textiles and charity/second-hand shops, although the choice available in certain categories is low. The centre has a low proportion of clothing and footwear stores compared to the national average which is surprising given the centre's role as a comparison shopping destination.

Table D.2 Canada Water Breakdown of Comparison Units

Type of Unit	Canada Water		% UK Average*
	Units 2012	%	
Clothing and footwear	8	17.0	25.0
Furniture, carpets and textiles	0	0	7.4
Booksellers, arts, crafts and stationers	6	12.8	10.6
Electrical, gas, music and photography	7	14.9	9.4
DIY, hardware and homewares	4	8.5	6.4
China, glass, gifts and fancy goods	1	2.1	4.6
Cars, motorcycles and motor access	4	8.5	1.3
Chemists, drug stores and opticians	7	14.9	10.0
Variety, department and catalogue	1	2.1	1.6
Florists, nurserymen and seedsmen	2	4.3	2.3
Toys, hobby, cycle and sport	5	10.6	5.2
Jewellers	2	4.3	5.0
Charity/second-hand	0	0	8.4
Other comparison retailers	0	0	2.9
Total	**47**	**100.0**	**100.0**

Source: Experian Goad, 2012
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Canada Water has an excellent range of non-retail service uses, with all categories present. Categories are mostly well represented (see Table D.3) reflecting the size of the centre and its service role in the shopping hierarchy. The proportion of hairdressers and beauty parlours is significantly lower than the national average, whereas there is a higher proportion of restaurants/cafes and fast food/takeaways.

Table D.3 Canada Water Analysis of Selected Service Uses

Type of Unit	Canada Water		% UK Average*
	Units 2012	%	
Restaurants/cafés	17	25.8	23.3
Fast food/takeaways	13	19.7	15.2
Pubs/bars	5	7.6	7.6
Banks/other financial services	4	6.1	12.9
Betting shops/casinos	2	3.0	4.0
Estate agents/valuers	10	15.2	9.5
Travel agents	2	3.0	2.5
Hairdressers/beauty parlours	10	15.2	22.9
Laundries/dry cleaners	3	4.5	2.2
Sub-Total	**66**	**100.0**	**100.0**
Other A1 Services	6	-	-
Total	**72**	**-**	**-**

Source: Experian Goad, 2012. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were seven vacant units within Canada Water at the time of the survey, giving a vacancy rate of 5.1%, which is much lower than the national average of 12.1%.

The New Southwark Plan: Interim Consultation Report Responses

Many respondents noted the shopping centre and plaza had a pleasant modern appearance with a high quality public realm. However, others considered the modern look to be cold and unwelcoming. The public library was identified as an important local landmark. Some respondents noted that the shopping centre and plaza was peaceful due to the lack of traffic movements.

Some respondents considered that the retail offer was too limited. This was due to an undersupply of retail premises and a lack of diversity in the retail offer. It was noted that there were few traditional ‘village’ high street retail types such as green grocers. The retail offer was also not particularly diverse as the retail outlets catered to the needs and tastes of wealthier consumers. Some respondents would welcome greater pedestrianisation and priority given to public transport to alleviate congestion on some routes.

Some respondents noted that they would welcome the provision of an open air market. Some respondents also noted that protection of public houses and older industrial buildings was particularly important to ensure local distinctiveness because the area has limited urban heritage value. One respondent noted that Albion Street should not be considered as a strategic road in terms of transport but should be protected as a high street with priority given to pedestrian movement.

Summary of Canada Water’s Strengths and Weaknesses

Strengths

- The centre’s vacancy rate is much lower than the national average.
- The centre has a good selection of comparison retail units.
- The centre is anchored by a very large Tesco Extra store which provides provision for main food shopping, top-up shopping as well clothing, electrical goods and white goods, amongst others.
- The centre has excellent transport links, with two stations serving both the underground and overground lines as well as car parking provision.
- There a number of national multiple retailers within the centre, including Tesco, BHS, Decathlon and WH Smiths.
- 25% of household survey respondents said the centre had a good range of shops.

- The ROI surrey "Understanding Perceptions of Southwark Town Centres February 2014" indicates Canada Water has the highest weekend spend (£33) when compared with other centres within the borough.

Weaknesses

- The layout of the centre is dissected and is split into two areas. The Surrey Quays Shopping Centre and shops and service on Lower Road, are dissected by a large surface car park and a main road, which restricts pedestrian movement.
- The proportion of clothing and footwear retailers is below the national average, as is the proportion of hairdressers and beauty parlours.
- The ROI surrey indicated that Canada Water has a lower proportion (38%) of affluent/financially comfortable customers than the London average (61%).
- Many (61%) of ROI survey respondents would like less betting shops and payday loan shops.

E. Borough and Bankside

Borough and Bankside is designated a District Centre within the Southwark Core Strategy and is designated CAZ frontage in the London Plan. It is located to the north of the borough and serves residents across the whole borough and wider London. This centre is extensive, extending from Borough High Street and includes Borough Market and a number of units along the river frontage.

Mix of Uses and Occupier Representation

Borough and Bankside has a total of 147 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table E.1, compared against the national average.

Table E.1 Borough/Bankside Use Class Mix by Unit

Type of Unit	Units 2013	% of Total Number of Units	
		Borough/Bankside	UK Average (1)
Comparison Retail	16	10.9	36.0
Convenience Retail	25	17.0	8.1
A1 Services (2)	7	4.8	14.1
A2 Services (3)	21	14.3	12.1
A3/A5	46	31.3	14.7
A4 pubs/bar	25	17.0	2.9
Vacant	7	4.8	12.1
Total	147	100.0	**100.0**

Source: Experian Goad 2013
(1) UK average for all town centres surveyed by Goad Plans (2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units is heavily focused on the convenience and food and drink sectors, with these categories much higher than the national average. This reflects its London Plan designation as a CAZ frontage, which serves as a Central London service centre. As such, the provision of comparison retailing is significantly lower than the national average. The vacancy rate of this centre is significantly lower than the national average at 4.8%, which reflects a vital and viable centre where demand for retail units is strong.

Retailer Representation

Borough and Bankside has a poor selection of comparison shops (16). Table E.2 provides a breakdown of comparison shop units by category.

The centre only provides some of the GOAD comparison categories, although the provision of booksellers/arts/stationers, china/glass/gifts/fancy goods, florists/nurserymen/seedsmen and electrical stores is above the national average.

Table E.2 Borough/Bankside Breakdown of Comparison Units

Type of Unit	Borough/Bankside		% UK Average*
	Units 2013	%	
Clothing and footwear	3	18.8	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	2	12.5	10.6
Electrical, gas, music and photography	3	18.8	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	2	12.5	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	2	12.5	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	6.3	2.3
Toys, hobby, cycle and sport	1	6.3	5.2
Jewellers	1	6.3	5.0
Charity/second-hand	0	0.0	8.4
Other comparison retailers	1	6.3	2.9
Total	16	100.0	**100.0**

Source: Experian Goad, 2013
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Borough and Bankside has an excellent range of non-retail service uses, with all categories present (see Table E.3) reflecting the size of the centre and its service role in Central London. The proportion of restaurants and cafes and pubs and bars is far higher than the national average. The proportion of betting shops, banks and hairdressers/beauty parlours is below the national average.

Table E.3 Borough/Bankside Analysis of Selected Service Uses

Type of Unit	Borough/Bankside		% UK Average*
	Units 2013	%	
Restaurants/cafés	34	34.7	23.3
Fast food/takeaways	12	12.2	15.2
Pubs/bars	25	25.5	7.6
Banks/other financial services	7	7.1	12.9
Betting shops/casinos	3	3.1	4.0
Estate agents/valuers	11	11.2	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	5	5.1	22.9
Laundries/dry cleaners	1	1.0	2.2
Total	98	100.0	**100.0**
Other A1 Retail Service	1		-
Overall Total	99		**-**

Source: Experian Goad 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were seven vacant retail units within Borough/Bankside with a vacancy rate of 4.8%, below the national average of 12.1%. The vacant units are dispersed through the centre.

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Respondents noted that Borough High Street does not have a ‘high street’ feel to it because of heavy traffic and poor pedestrianisation - particularly pedestrian crossing opportunities. The lack of cycle parking was also considered to be an issue by one respondent. Some respondents also noted that there were too many estate agents. One respondent noted that the heritage is not fully realised and there is poor consistency between different sections of the high street in terms of architectural style.

Summary of Bankside/Borough’s Strengths and Weaknesses

Strengths

- The centre has a good range of restaurants, cafes and bars, providing a very strong evening economy.
- Borough Market provides specialist convenience provision which attracts international visitors.
- The centre is highly accessible in terms of transport links, with a mainline railway station, bus station and underground station.
- The River provides an attractive focal point.
- A number of tourist attractions are located in the area including the Borough Market and Tate Modern which attract visitors to the centre.
- 17% of respondents to the household survey said they liked the market.
- The ROI surrey “Understanding Perceptions of Southwark Town Centres February 2014” indicates Borough/Bankside has a relatively higher average weekday when compared with other centres in the borough (£21 compared with £19 or below in most centres).
- The ROI surrey indicates Borough/Bankside has the highest proportion (56%) of affluent/financially comfortable customers within the borough’s main centres, and just below the London average (61%).

Weaknesses

- The centre does not provide a strong comparison offer and visitors have to go further afield for this offer.
- The centre suffers from heavy traffic flows along Borough High Street.
- 7% of respondents to the household survey said the centre is too expensive.

- Many (59%) of ROI survey respondents would like less betting shops and payday loan shops.

F. London Bridge

London Bridge is designated a District Centre within the Southwark Core Strategy and is designated CAZ frontage in the London Plan. It is located to the north of the borough and serves residents across the whole borough and wider London. The centre extends to London Bridge Railway Station and along Tooley Street, including Hays Galleria and More London.

Mix of Uses and Occupier Representation

London Bridge has a total of 89 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table F.1, compared against the national average.

Table F.1 London Bridge Use Class Mix by Unit

Type of Unit	Units 2013	% of Total Number of Units	
		London Bridge %	UK Average (1)
Comparison Retail	16	18.0	36.0
Convenience Retail	19	21.3	8.1
A1 Services (2)	4	4.5	14.1
A2 Services (3)	3	3.4	12.1
A3/A5	32	36.0	14.7
A4 pubs/bar	8	9.0	2.9
Vacant	7	7.9	12.1
Total	89	100.0	**100.0**

Source: Experian Goad 2013
(1) UK average for all town centres surveyed by Goad Plans (2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

Similarly to Borough/Bankside, the centre's mix of units is heavily focused on the convenience and food and drink sector, with these categories much higher than the national average. This reflects its London Plan designation as a CAZ frontage which serves as a Central London service centre. As such, the provision of comparison retailing is significantly lower than the national average. The vacancy rate of this centre is lower than the national average at 7.9%, which reflects a vital and viable centre where demand for retail units is strong.

Retailer Representation

London Bridge has a poor selection of comparison shops (16). Table F.2 provides a breakdown of comparison shop units by category.

The centre only provides some of the GOAD comparison categories, although the provision of clothing/footwear, booksellers/arts/stationers and florists/ nurserymen/seedsmen is good. Most of the comparison retailers are located within Hays Galleria and include Next, Boots and Accessorize.

Table F.2 London Bridge Breakdown of Comparison Units

Type of Unit	London Bridge		% UK Average*
	Units 2013	%	
Clothing and footwear	5	31.3	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	3	18.8	10.6
Electrical, gas, music and photography	1	6.3	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	4	25.0	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	1	6.3	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	6.3	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second-hand	0	0.0	8.4
Other comparison retailers	1	6.3	2.9
Total	16	100.0	**100.0**

Source: Experian Goad, 2013
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

London Bridge has an excellent range of non-retail service uses, with all categories present, apart from betting shops/casinos (see Table F.3) reflecting the size of the centre and its service role in Central London. The proportion of restaurants and cafes and pubs and bars is much higher than the national average. The proportion of hairdressers/beauty parlours and banks/other financial services is significantly below the national average.

Table F.3 London Bridge Analysis of Selected Service Uses

Type of Unit	London Bridge		% UK Average*
	Units 2013	%	
Restaurants/cafés	26	56.5	23.3
Fast food/takeaways	6	13.0	15.2
Pubs/bars	8	17.4	7.6
Banks/other financial services	2	4.3	12.9
Betting shops/casinos	0	0.0	4.0
Estate agents/valuers	1	2.2	9.5
Travel agents	1	2.2	2.5
Hairdressers/beauty parlours	1	2.2	22.9
Laundries/dry cleaners	1	2.2	2.2
Total	46	100.0	**100.0**
Other A1 Retail Service	1		-
Overall Total	47		**-**

Source: Experian Goad 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were seven vacant retail units within London Bridge with a vacancy rate of 7.9%, below the national average of 12.1%. The vacant units are dispersed through the centre.

Summary of London Bridge's Strengths and Weaknesses

Strengths

- The centre has a good range of restaurants, cafes and bars, providing a very strong evening economy.
- The centre is highly accessible in terms of transport links, with a mainline railway station, bus station and underground station.
- London Bridge is currently under-going redevelopment, which will enhance the transport hub and also improve the provision of shops and services within the area including the uses of railway arches.
- The River provides an attractive focal point for units at Hays Galleria and More London, providing a good quality public realm.
- A number of tourist attractions are located in London Bridge including the Shard which attracts visitors to the centre.
- 24% of respondents to the household survey said they liked the shopping environment at London Bridge.

Weaknesses

- The centre does not provide a strong comparison offer and visitors have to go further afield for this offer.
- The centre is separated by London Bridge station which can prohibit pedestrian navigation, especially with heavy traffic flows along Tooley Street.
- 5% of respondents to the household survey said the centre is too expensive.

G. Lordship Lane

Lordship Lane is designated a District Centre within both the Southwark Core Strategy and the London Plan. It is located to the south-east of the borough in East Dulwich. It primarily serves residents of the local area but does attract customers from elsewhere in the borough.

Mix of Uses and Occupier Representation

Lordship Lane has a total of 156 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table G.1, compared against the national average.

Table G.1 Lordship Lane Use Class Mix by Unit

Type of Unit	Units 2009	Units 2013	% of Total Number of Units	
			Lordship Lane %	UK Average (1)
Comparison Retail	48	51	32.7	36.0
Convenience Retail	19	24	15.4	8.1
A1 Services (2)	90	13	8.3	14.1
A2 Services (3)		18	11.5	12.1
A3/A5		33	21.2	14.7
A4 pubs/bar		8	5.1	2.9
Vacant	13	9	5.8	12.1
Total	**170**	**156**	**100.0**	**100.0**

Source: 2009 GVA Retail Study and Experian Goad 2013
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units is broadly similar to the national average, although the proportion of convenience and food and drink uses are above the national average. Whilst slightly below the national average, the centre has a good proportion of comparison units for a centre of its size, which would normally be expected to play a service role. The vacancy rate of this centre is lower than the national average at 5.8%, which reflects a vital and viable centre where demand for retail units is strong.

Retailer Representation

Lordship Lane has a good selection of comparison shops (51). Table G.2 provides a breakdown of comparison shop units by category.

The centre provides a good mix of the Goad Plan comparison categories, although the choice available in certain categories is low, and there is no representation within the variety/department stores. The centre is mainly comprised of independent retailers with a small selection of national multiple retailers including Oliver Bonas and the White Stuff.

Table G.2 Lordship Lane Breakdown of Comparison Units

Type of Unit	Lordship Lane		% UK Average*
	Units 2013	%	
Clothing and footwear	9	17.6	25.0
Furniture, carpets and textiles	3	5.9	7.4
Booksellers, arts, crafts and stationers	5	9.8	10.6
Electrical, gas, music and photography	1	2.0	9.4
DIY, hardware and homewares	8	15.7	6.4
China, glass, gifts and fancy goods	5	9.8	4.6
Cars, motorcycles and motor access	4	7.8	1.3
Chemists, drug stores and opticians	5	9.8	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	4	7.8	2.3
Toys, hobby, cycle and sport	1	2.0	5.2
Jewellers	1	2.0	5.0
Charity/second-hand	4	7.8	8.4
Other comparison retailers	1	2.0	2.9
Total	**51**	**100.0**	**100.0**

Source: Experian Goad, 2013
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Lordship Lane has an excellent range of non-retail service uses, with all categories present apart from travel agents, and mostly well represented (see Table G.3) reflecting the size of the centre and its service role in the shopping hierarchy. The proportion of restaurants and cafes is higher than the national average.

Table G.3 Lordship Lane Analysis of Selected Service Uses

Type of Unit	Lordship Lane		% UK Average*
	Units 2013	%	
Restaurants/cafés	27	38.0	23.3
Fast food/takeaways	6	8.5	15.2
Pubs/bars	8	11.3	7.6
Banks/other financial services	2	2.8	12.9
Betting shops/casinos	3	4.2	4.0
Estate agents/valuers	13	18.3	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	9	12.7	22.9
Laundries/dry cleaners	3	4.2	2.2
Total	**71**	**100.0**	**100.0**
Other A1 Retail Service	1	-	-
Overall Total	**72**	**-**	**-**

Source: Experian Goad 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were nine vacant retail units within Lordship Lane a vacancy rate of 5.8%, below the national average of 12.1%. The vacant units are dispersed through the centre.

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Respondents were satisfied with the variety of retail uses, independent ownership of businesses and high quality urban design and heritage. Some support was voiced for enhanced parking opportunities for disabled residents. However, some respondents did not consider that the high street catered to lower income households. A high number of respondents noted that the high street had too high a concentration of estate agents which reduced the vitality of the high street. Some respondents identified that Northcross Street Market needs more pitches to enable it to grow into a thriving market, potentially a destination market, which attracts more customers to the high street.

Summary of Lordship Lane's Strengths and Weaknesses

Strengths

- The centre has a good range of restaurants and cafes, with representation well above the national average.
- The compact layout of the centre, primarily along Lordship Lane and North Cross Road provides a legible accessible centre.
- The evening economy is good with a good selection of pubs, bars and a cinema is opening shortly.
- The centre has public transport connections by national rail (East Dulwich Railway Station) and several bus routes.
- The quality of shopfronts within the centre is good, providing an attractive shopping environment.
- 31% of respondents to the household survey said Lordship Lane had a good range of shops.

Weaknesses

- The proportion of A1 service units is below the national average, and the centre does not include a travel agents.
- Whilst the centre is easy to navigate, heavy traffic flows along Lordship Lane can impede pedestrian movement.
- 10% of respondents to the household survey said the centre had poor car parking provisions.

H. Camberwell

Camberwell is designated a District Centre within both the Southwark Core Strategy and the London Plan. It is located in the middle of the borough and straddles the boundary of the London Boroughs of Lambeth and Southwark. Approximately 90% of all the units are located within Southwark Borough, however this analysis refers to the whole centre.

The retail centre is comprised of a mix of building styles, ranging from traditional terrace period building typical of a London High Street to more modern infill development. Camberwell is bounded by residential areas and the centre primarily serves residents of the local area.

Mix of Uses and Occupier Representation

Camberwell has a total of 192 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table H.1, compared against the national average.

Table H.1 Camberwell Use Class Mix by Unit

Type of Unit	Units 2013	% of Total Number of Units	
		Camberwell %	UK Average (1)
Comparison Retail	45	23.4	36.0
Convenience Retail	22	11.5	8.1
A1 Services (2)	38	19.8	14.1
A2 Services (3)	22	11.5	12.1
A3/A5	43	22.4	14.7
A4 pubs/bar	7	3.6	2.9
Vacant	15	7.8	12.1
Total	**192**	**100.0**	**100.0**

Source: Experian Goad 2013
(1) UK average for all town centres surveyed by Goad Plans (2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units differs from the national average. The proportion of comparison retail is almost 13 percentage points below the national average figure. The proportion of convenience and food and drink uses are well above the national average. Whilst slightly above the national average, the centre has a good proportion of convenience units, which would be expected for a centre of its size.

The vacancy rate of this centre is lower than the national average at 7.8%, which reflects a vital and viable centre where demand for retail units is strong.

Retailer Representation

Camberwell District Centre has a relatively small selection of comparison shops (45). Table H.2 provides a breakdown of comparison shop units by category.

A number of goods categories are not represented within Camberwell, which reflects the low proportion of comparison retail units within the centre overall. Categories not represented include china/glass/gifts/fancy goods, cars/motorcycles/motor accessories, and variety/department/catalogue stores.

The centre contains a higher than average percentage of booksellers/arts/crafts/stationers, electrical/gas/music/photography, and chemists/drugstores/opticians. The proportion of clothing and footwear, furniture/carpets/textiles, toys/hobbies/cycle/sport, and charity/second-hand shops is lower than the national average.

There are a small number of national multiple retailers within the centre, including Peacocks, Snappy Snaps and Superdrug.

Table H.2 Camberwell Breakdown of Comparison Units

Type of Unit	Camberwell		% UK Average*
	Units 2013	%	
Clothing and footwear	8	17.9	25.0
Furniture, carpets and textiles	1	2.2	7.4
Booksellers, arts, crafts and stationers	12	26.7	10.6
Electrical, gas, music and photography	6	13.3	9.4
DIY, hardware and homewares	4	8.9	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	8	17.8	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	2.2	2.3
Toys, hobby, cycle and sport	1	2.2	5.2
Jewellers	2	4.4	5.0
Charity/second-hand	2	4.4	8.4
Other comparison retailers	0	0	2.9
Total	**45**	**100.0**	**100.0**

Source: Experian Goad, 2013
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Camberwell has a good range of non-retail service uses, with all categories present apart from travel agents (see Table H.3).

The proportion of restaurants and cafes is higher than the national average, as is the number of hairdressers/beauty parlours and laundries/dry cleaners. The proportion of banks/other financial services, fast food/takeaways and estate agents is lower than the national average.

Table H.3 Camberwell Analysis of Selected Service Uses

Type of Unit	Camberwell		% UK Average*
	Units 2013	%	
Restaurants/cafés	30	28.8	23.3
Fast food/takeaways	13	12.6	15.2
Pubs/bars	7	6.7	7.6
Banks/other financial services	10	9.6	12.9
Betting shops/casinos	5	4.8	4.0
Estate agents/valuers	7	6.7	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	27	25.9	22.9
Laundries/dry cleaners	5	4.8	2.2
Total	**104**	**100.0**	**100.0**
Other A1 Retail Service	6	-	-
Overall Total	**110**	**-**	**-**

Source: Experian Goad 2013. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 15 vacant retail units within Camberwell giving a vacancy rate of 7.8%, below the national average of 12.1%. The vacant units are dispersed through the centre and there are no evident clusters.

The New Southwark Plan: Interim Consultation Report Responses

One respondent voiced support for refurbishing Camberwell and implementing general public realm enhancements.

Summary of Camberwell's Strengths and Weaknesses

Strengths

- The centre has a good range of restaurants and cafes, with representation well above the national average.
- The centre has two supermarkets which are suitable for both main and top up food shopping. These are supported by a good range of other convenience retailers.
- The vacancy rate is considerably lower than the national average which suggests demand for units within the centre is reasonably high.
- Camberwell provides an attractive landscaped open space which significantly increases the overall environmental attractiveness of the centre.
- The centre is served by a number of bus routes which serve south east and central London.

Weaknesses

- The proportion of A1 service units is below the national average, and there are no travel agents.

- There are few national retailers that would attract shoppers from a wider area.
- Heavy traffic flows through the centre detracts from the overall environmental quality. 7% of respondents to the household survey stated this as something they did not like about the centre.
- The ROI surrey “Understanding Perceptions of Southwark Town Centres February 2014” indicated that Camberwell has a lower proportion (45%) of affluent/financially comfortable customers than the London average (61%).
- The ROI survey suggests Camberwell has a low average weekend spend (£21 compared with over £30 in most centres).
- Many (78%) of ROI survey respondents would like less betting shops and payday loan shops.

I. Herne Hill

Herne Hill district centre straddles the boundary of Southwark and Lambeth, with the main concentration of the retail units located on Half Moon Lane in Southwark, although the railway station and shops on Railton Road are within Lambeth. The analysis below relates to the centre as a whole. Shop units in the centre are a mix of traditional terraced properties, post-war single storey units and railway arches. Herne Hill fulfils a predominantly local shopping role. Herne Hill district centre. The centre is dissected by the railway line and is bounded by residential areas to the north, south and east and Brockwell Park to the west.

Mix of Uses and Occupier Representation

Herne Hill has a total of 107 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table I.1, compared against the national average.

Table I.1 Herne Hill Use Class Mix by Unit

Type of Unit	Units 2012	% of Total Number of Units	
		Herne Hill %	UK Average (1)
Comparison Retail	34	31.8	36.0
Convenience Retail	14	13.1	8.1
A1 Services (2)	14	13.1	14.1
A2 Services (3)	8	7.5	12.1
A3/A5	23	21.5	14.7
A4 pubs/bar	6	5.6	2.9
Vacant	8	7.5	12.1
Total	**107**	**100.0**	**100.0**

Source: NLP, 2012
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The proportion of comparison retail is slightly below the national average figure, while the proportion of convenience and food and drink uses are well above the national average. The vacancy rate of this centre is lower than the national average at 7.5%, which reflects a vital and viable centre where demand for retail units is strong.

Retailer Representation

Herne Hill District Centre has a relatively small selection of comparison shops (34). Table I.2 provides a breakdown of comparison shop units by category.

There is some representation of comparison retailers across most of the different types of comparison retail goods, but the choice within categories is poor. The only categories which are not represented are variety, department and catalogue stores and jewellers. There is an especially good range of booksellers, arts, crafts and stationers. Clothing and footwear and furniture, carpets and textile retailers are noticeably below the national average.

The centre has a limited number of multiple retailers and most businesses are small independents, with Londis and Oxfam present. The centre has a successful street market.

Table I.2 Herne Hill Breakdown of Comparison Units

Type of Unit	Herne Hill		% UK Average*
	Units 2012	%	
Clothing and footwear	4	17.9	25.0
Furniture, carpets and textiles	4	2.2	7.4
Booksellers, arts, crafts and stationers	8	26.7	10.6
Electrical, gas, music and photography	4	13.3	9.4
DIY, hardware and homewares	1	8.9	6.4
China, glass, gifts and fancy goods	2	0	4.6
Cars, motorcycles and motor access	1	0	1.3
Chemists, drug stores and opticians	3	17.8	10.0
Variety, department and catalogue	1	0	1.6
Florists, nurserymen and seedsmen	2	2.2	2.3
Toys, hobby, cycle and sport	3	2.2	5.2
Jewellers	0	4.4	5.0
Charity/second-hand	0	0	8.4
Other comparison retailers	1	2.9	2.9
Total	**34**	**100**	**100.0**

Source: NLP, 2012
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Herne Hill has a reasonable range of non-retail service uses, with all categories present apart from travel agents (see Table I.3).

Table I.3 Herne Hill Analysis of Selected Service Uses

Type of Unit	Herne Hill		% UK Average*
	Units 2012	%	
Restaurants/cafés	23	51.1	23.3
Fast food/takeaways	3	6.7	15.2
Pubs/bars	-	-	7.6
Banks/other financial services	5	6.7	12.9
Betting shops/casinos	-	-	4.0
Estate agents/valuers	5	11.1	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	12	26.7	22.9
Laundries/dry cleaners	2	4.4	2.2
Total	**45**	**100.0**	**100.0**
Other A1 Retail Service		-	-
Overall Total	**110**	**-**	**-**

Source: NLP, 2012. * UK average for all town centres surveyed by Goad Plans (March 2014)

The proportion of restaurants and cafes is much higher than the national average as is the number of hairdressers/beauty parlours, laundries/dry cleaners and estate agents/valuers. The proportion of banks/other financial services and fast food/takeaways is lower than the national average.

Vacant Units

There were eight vacant retail units within Herne Hill giving a vacancy rate of 7.5%, below the national average of 12.1%. The vacant units are dispersed through the centre.

Summary of Herne Hill's Strengths and Weaknesses

Strengths

- The centre has a good range of restaurants and cafes, with representation well above the national average.
- The centre has a small Sainsbury's Local supermarket which is suitable for top up food shopping. This is supported by a good range of other convenience retailers.
- The vacancy rate is considerably lower than the national average which suggests demand for units within the centre is reasonably high.
- Herne Hill provides an attractive, high quality public realm and is in close proximity to Brockwell Park helping to increase the overall environmental attractiveness of the centre.
- The centre is served by a number of bus routes which serve south east and central London.
- 22% of respondents to the household survey like the shopping environment.

Weaknesses

- There is limited car parking provision within the centre, however, this is countered by the good public transport links.
- The layout of the centre around a series of junctions reduces pedestrian legibility, and acts as a barrier to free pedestrian movement. The centre is effectively dissected in two by the railway line. However, this has been much improved by recent public realm enhancements.
- There is a very limited national multiple retailer presence and the choice of comparison shopping retail units is well below the national average.
- The centre also does not have any banks.

J. The Blue

The Blue is situated on Southwark Park Road in Bermondsey. The centre runs from just west of St James's Road junction, consisting of a continuous retail frontage along Southwark Park Road, ending at the railway line. It forms a linear high street with a 'market place' at the centre.

The majority of the retail units in the centre are post-war blocks of flats with retail on the ground floor. There are a few pre-war properties interspersed along the eastern end of the centre. The Blue fulfils a local shopping role. It is bounded by residential areas to the north, south and west, with railway lines to the east.

Mix of Uses and Occupier Representation

The Blue has a total of 80 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table J.1, compared against the national average.

Table J.1 The Blue Use Class Mix by Unit

Type of Unit	Units 2012	% of Total Number of Units	
		The Blue %	UK Average (1)
Comparison Retail	21	26.3	36.0
Convenience Retail	11	13.8	8.1
A1 Services (2)	14	17.5	14.1
A2 Services (3)	9	11.3	12.1
A3/A5	13	16.3	14.7
A4 pubs/bar	3	3.8	2.9
Vacant	9	11.3	12.1
Total	**80**	**100.0**	**100.0**

Source: Experian Goad 2012
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units differs substantially to the national average. The proportion of comparison retail is below the national average figure. The proportion of convenience, food and drink and A1 service uses are above the national average. This is generally expected for a centre of this size, serving the local population.

The vacancy rate of this centre is roughly in line with the national average at 11.3% against 12.1%. This indicates that the centre is not as vibrant as some of the other centres within the borough.

Retailer Representation

The centre has a limited number of multiple retailers with Superdrug, Tesco Express, Co-op and Iceland present. Most businesses are small independents. The centre has a market open Monday to Saturday.

The Blue Local Centre has a small selection of comparison shops (21). Table J.2 provides a breakdown of comparison shop units by category.

There is some representation of comparison retailers across the different types of comparison retail goods, but the choice within categories is poor. The categories which are not represented are electrical/gas/music/photography, china/glass/gifts/fancy goods, cars/motorcycles/motor accessories, variety/department/catalogue, toys/hobby/cycle/sport and jewellers.

There is an especially good range of booksellers/arts/crafts/stationers, chemists/drug stores/opticians, DIY/hardware/homewares, florists/nurserymen/seedsmen and charity/second-hand shops. Clothing and footwear retailers are noticeably below the national average.

Table J.2 The Blue Breakdown of Comparison Units

Type of Unit	The Blue		% UK Average*
	Units 2012	%	
Clothing and footwear	3	14.3	25.0
Furniture, carpets and textiles	2	9.5	7.4
Booksellers, arts, crafts and stationers	3	14.3	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	4	19.0	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	4	19.0	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	2	9.5	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second-hand	3	14.3	8.4
Other comparison retailers	0	0.0	2.9
Total	**21**	**100.0**	**100.0**

Source: Experian Goad, 2012
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

The Blue has a reasonable range of non-retail service uses, with most categories present (see Table J.3).

The proportion of betting shops/casinos and laundries/dry cleaners is much higher than the national average. All other categories are in line with the national average or below. There are no estate agents/valuers or travel agents and the proportion of restaurants/cafes is below the national average. The proportion of banks/other financial services, fast food/takeaways and pubs/bars is very similar to the national average.

Table J.3 The Blue Analysis of Selected Service Uses

Type of Unit	The Blue		% UK Average*
	Units 2012	%	
Restaurants/cafés	7	19.4	23.3
Fast food/takeaways	6	16.7	15.2
Pubs/bars	3	8.3	7.6
Banks/other financial services	4	11.1	12.9
Betting shops/casinos	5	13.9	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	8	22.2	22.9
Laundries/dry cleaners	3	8.3	2.2
Total	**36**	**100.0**	**100.0**
Other A1 Retail Service	3	-	-
Overall Total	**39**	**-**	**-**

Source: Experian Goad 2012. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were nine vacant retail units within The Blue giving a vacancy rate of 11.3%, slightly below the national average of 12.1%.

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Some respondents voiced support for town centre enhancements to the public realm. Many respondents identified that The Blue was in a relatively poor condition and appeared neglected. Many respondents supported the provision of additional market pitches. Respondents noted that there were too many pawnbrokers and similar uses as well as takeaways. Some respondents claimed they would support more uses suitable for children and young people. Some respondents perceived the high street as unsafe and voiced support for greater lighting and CCTV cameras.

Summary of The Blue's Strengths and Weaknesses

Strengths

- The centre has an above average provision of convenience retail.
- The centre has a Co-op supermarket for main food shopping. This is supported by Tesco Express and Iceland supermarkets which are suitable for top-up food shopping.
- A zebra crossing in the middle of the centre and the linear and compact nature of the centre provides a pedestrian friendly environment.
- There is on-street car parking.
- 32% of respondents to the household survey liked how close/convenient the centre is to their home.

Weaknesses

- The centre is approximately 750 metres south of Bermondsey underground station and north of South Bermondsey Railway Station, so access to the centre by public transport is not particularly easy. 5% of respondents to the household survey suggested the centre was not easy to get to.
- The centre is not well connected to the wider road network.
- The buildings are drab and the centre lacks interesting features.

K. Dulwich Village

Dulwich Village Local Centre is situated in the south of the borough. The centre runs from the junction with Gilkes Place consisting of a retail frontage along Dulwich Village, interspersed with housing. The majority of the retail units in the centre are pre-war buildings with retail on the ground floor. Dulwich Village fulfils a local shopping role, bounded on all sides by residential properties.

Mix of Uses and Occupier Representation

Dulwich Village has a total of 32 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table K.1, compared against the national average.

Table K.1 Dulwich Village Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Dulwich Village %	UK Average (1)
Comparison Retail	11	34.4	36.0
Convenience Retail	3	9.4	8.1
A1 Services (2)	5	15.6	14.1
A2 Services (3)	5	15.6	12.1
A3/A5	6	18.8	14.7
A4 pubs/bar	1	3.1	2.9
Vacant	1	3.1	12.1
Total	**32**	**100.0**	**100.0**

Source: VOA and NLP, 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units is broadly similar to the national average. The proportion of comparison retail is very slightly below the national average figure. The proportion of convenience, food and drink and A1 service uses are above the national average. This is generally what would be expected for a centre of this size, serving the local population, although the proportion of comparison units is high for such a small centre.

The vacancy rate of this centre is significantly below the national average at 3.1% against 12.1%. This translates into one unit and shows that the centre is vibrant and there is high demand for the units.

Retailer Representation

Dulwich Village Local Centre has a small selection of comparison shops (11). Table K.2 provides a breakdown of comparison shop units by category.

There is some representation of comparison retailers across the different types of comparison retail goods, but the choice within categories is poor, with only one or two retailers within the categories present, offering limited choice. A number of categories are not represented.

The centre has a very limited number of multiple retailers and the vast majority of businesses are small independents.

Table K.2 Dulwich Village Breakdown of Comparison Units

Type of Unit	Dulwich Village		% UK Average*
	Units 2014	%	
Clothing and footwear	1	9.1	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	2	18.2	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	2	18.2	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor access	1	9.1	1.3
Chemists, drug stores and opticians	2	18.2	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	9.1	2.3
Toys, hobby, cycle and sport	1	9.1	5.2
Jewellers	0	0.0	5.0
Charity/second-hand	1	9.1	8.4
Other comparison retailers	0	0.0	2.9
Total	**11**	**100.0**	**100.0**

Source: VOA and NLP, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Dulwich Village has a good range of non-retail service uses, with most categories present apart from travel agents, bookmakers and fast food/ takeways (see Table K.3).

Table K.3 Dulwich Village Analysis of Selected Service Uses

Type of Unit	Dulwich Village		% UK Average*
	Units 2014	%	
Restaurants/cafés	6	37.5	23.3
Fast food/takeaways	0	0.0	15.2
Pubs/bars	1	6.3	7.6
Banks/other financial services	1	6.3	12.9
Betting shops/casinos	0	0.0	4.0
Estate agents/valuers	4	25.0	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	3	18.8	22.9
Laundries/dry cleaners	1	6.3	2.2
Total	**16**	**100.0**	**100.0**
Other A1 Retail Service	1	-	-
Overall Total	**17**	**-**	**-**

Source: VOA and NLP, 2014. * UK average for all town centres surveyed by Goad Plans (March 2014)

The proportion of restaurants/cafes and estate agents/values is much higher than the national average, as is the proportion of laundries/dry cleaners. All other categories are in line with the national average or below. The proportion of banks/other financial services and hairdressers/beauty parlours is below the national average, while the proportion of pubs/bars is similar to the national average.

Vacant Units

There was just one vacant retail units within Dulwich Village, giving a vacancy rate of 3.1%, significantly below the national average of 12.1%. It should be noted that we understand the vacant unit is in the process being brought back into use, so there could potentially be a 0% vacancy rate.

Summary of Dulwich Village's Strengths and Weaknesses

Strengths

- The centre has an above average provision of services.
- The vacancy rate is significantly below the national average.
- The buildings are attractive and well-kept.
- The wide pavements create a pedestrian friendly environment.
- There is on-street car parking at the northern end of the centre.
- For its size, the centre has a higher proportion of comparison retailers than would be expected.
- 43% of respondents to the household survey like the shopping environment.

Weaknesses

- The centre is approximately 300 metres south of North Dulwich Railway Station.
- The centre is not served by many bus routes.
- There are no national multiple retailers and there is a limited choice of comparison goods.
- 20% of respondents to the household survey said the shops within the centre are too expensive.

L. Nunhead

Nunhead Local Centre is situated in the east of the borough. The centre is split into two parts, running along Evelina Road from the railway line south to Nunhead Green. The centre also includes retail units on Gibbon Road, from its junction with Evelina Road to the junction with Kimberley Avenue. The majority of the retail units in the centre are the ground floor of pre-war terrace buildings, with some post-war terraces. Nunhead fulfils a local shopping role and is bounded by residential areas.

Mix of Uses and Occupier Representation

Nunhead has a total of 62 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table L.1, compared against the national average.

Table L.1 Nunhead Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Nunhead %	UK Average (1)
Comparison Retail	11	17.7	36.0
Convenience Retail	10	16.1	8.1
A1 Services (2)	11	17.7	14.1
A2 Services (3)	2	3.2	12.1
A3/A5	10	16.1	14.7
A4 pubs/bar	3	4.8	2.9
Vacant	15	24.2	12.1
Total	**62**	**100.0**	**100.0**

Source: NLP, 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units differs substantially to the national average. The proportion of comparison retail is significantly below the national average figure, while the proportion of convenience, food and drink and A1 service uses are above the national average. This is what is expected for a centre of this size, serving the day to day needs of the local population.

The vacancy rate of this centre is double the national average at 24.2% against 12.1%. This indicates that the centre is not as vibrant as some of the other centres within the borough and is struggling to attract new retailers.

Retailer Representation

Nunhead Local Centre has a small selection of comparison shops (11). Table L.2 provides a breakdown of comparison shop units by category.

There is poor representation of comparison retailers across the different types of comparison retail goods, and the choice within categories is poor. A number of categories are not present in the centre. The centre has a limited number of multiple retailers and most businesses are small independents.

Table L.2 Nunhead Breakdown of Comparison Units

Type of Unit	Nunhead		% UK Average*
	Units 2014	%	
Clothing and footwear	1	9.1	25.0
Furniture, carpets and textiles	1	9.1	7.4
Booksellers, arts, crafts and stationers	0	0	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	2	18.2	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor access	1	9.1	1.3
Chemists, drug stores and opticians	2	18.2	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	9.1	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	0	0.0	5.0
Charity/second-hand	1	9.1	8.4
Other comparison retailers	2	18.2	2.9
Total	**11**	**100.0**	**100.0**

Source: NLP, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Nunhead has a reasonable range of non-retail service uses, with all categories present apart from banks/other financial services and travel agents (see Table L.3).

Table L.3 Nunhead Analysis of Selected Service Uses

Type of Unit	Nunhead		% UK Average*
	Units 2014	%	
Restaurants/cafés	1	4.3	23.3
Fast food/takeaways	9	39.1	15.2
Pubs/bars	3	13.0	7.6
Banks/other financial services	0	0	12.9
Betting shops/casinos	1	4.3	4.0
Estate agents/valuers	1	4.3	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	6	26.1	22.9
Laundries/dry cleaners	2	8.7	2.2
Total	**23**	**100.0**	**100.0**
Other A1 Retail Service	3	-	-
Overall Total	**26**	**-**	**-**

Source: NLP, 2014. * UK average for all town centres surveyed by Goad Plans (March 2014)

The proportion of fast food/takeaways (at 39.1%) is much higher than the national average, whereas the proportion of restaurants/cafes is significantly below, with only 4.3% falling into this category. Pubs/bars and hairdressers/beauty parlours were also above the national average, as were laundries/dry cleaners.

Vacant Units

There were 15 vacant retail units within Nunhead giving a vacancy rate of 24.2%, double the national average of 12.1%.

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Residents valued the open space of Nunhead Green but felt that it was not sufficiently child friendly. Users of the high street also noted there was a need for a public toilet.

Summary of Nunhead's Strengths and Weaknesses

Strengths

- The centre has an above average provision of convenience retail.
- The centre has a lot of independent traders.
- Nunhead Railway station gives easy access to the centre.
- Nunhead Green to the south is an attractive feature and provides a pleasant area to sit and relax.
- 25% of respondents to the household survey said that they like the shopping environment.

Weaknesses

- The centre is split in two by the railway line.
- There are vacant unit clusters within the centre, making the area look run-down.
- The centre has very few comparison retailers and limited national multiple retailers.
- The number of A2 services is very low.
- The centre is very fragmented, being located on two separated roads, with large gaps between retail frontages in some areas.

M. Tower Bridge Road

Tower Bridge Road is not designated as a centre in either the London Plan or Southwark Core Strategy. However, it does have a significant retail provision. It is situated in the north of the borough. The centre runs along Tower Bridge Road from the junction with Grange Walk to Bricklayers Arms. The majority of the retail units in the centre are the ground floor of pre-war terrace buildings, with some post-war infills. Tower Bridge Road fulfils a local shopping role and is bounded by residential and business areas.

Mix of Uses and Occupier Representation

Tower Bridge Road has a total of 63 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table M.1, compared against the national average.

Table M.1 Tower Bridge Road Use Class Mix by Unit

Type of Unit	Units 2012	% of Total Number of Units	
		TBR %	UK Average (1)
Comparison Retail	10	15.9	36.0
Convenience Retail	10	15.9	8.1
A1 Services (2)	14	22.2	14.1
A2 Services (3)	6	9.5	12.1
A3/A5	10	15.9	14.7
A4 pubs/bar	4	6.3	2.9
Vacant	9	14.3	12.1
Total	**63**	**100.0**	**100.0**

Source: Experian Goad 2012
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015

The centre's mix of units differs substantially to the national average. The proportion of comparison retail is significantly below the national average figure. The proportion of convenience, food and drink and A1 service uses are above the national average. This is what is expected for a centre of this size, serving the local population.

The vacancy rate of this centre is above the national average at 14.3% against 12.1%. This shows that the centre is not as vibrant as some of the other centres within the borough and may struggle to attract new retailers.

Retailer Representation

Tower Bridge Road has a very limited selection of comparison shops (10). Table M.2 provides a breakdown of comparison shop units by category. There is poor representation of comparison retailers across the different types of comparison retail goods, and the choice within categories is poor.

The centre has a limited number of multiple retailers and the vast majority of businesses are small independents.

Table M.2 Tower Bridge Road Breakdown of Comparison Units

Type of Unit	Tower Bridge Road		% UK Average*
	Units 2012	%	
Clothing and footwear	1	10.0	25.0
Furniture, carpets and textiles	2	20.0	7.4
Booksellers, arts, crafts and stationers	1	10.0	10.6
Electrical, gas, music and photography	1	10.0	9.4
DIY, hardware and homewares	1	10.0	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	1	10.0	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	1	10.0	5.2
Jewellers	0	0	5.0
Charity/second-hand	1	10.0	8.4
Other comparison retailers	1	10.0	2.9
Total	**10**	**100.0**	**100.0**

Source: Experian Goad, 2012
* UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Tower Bridge Road has a good range of non-retail service uses, with all categories present apart from estate agents/valuers and travel agents (see Table J.3).

The proportion of pubs/bars (at 15.4%) is twice the national average. The proportion of restaurants/cafes and laundries/dry cleaners is also above the national average with 26.9% and 11.5% respectively.

The proportion of fast food/takeaways and banks/other financial services is below the national average.

Table M.3 Tower Bridge Road Analysis of Selected Service Uses

Type of Unit	Tower Bridge Road		% UK Average*
	Units 2014	%	
Restaurants/cafés	7	26.9	23.3
Fast food/takeaways	3	11.5	15.2
Pubs/bars	4	15.4	7.6
Banks/other financial services	2	7.7	12.9
Betting shops/casinos	2	7.7	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	5	19.2	22.9
Laundries/dry cleaners	3	11.5	2.2
Total	**26**	**100**	**100.0**
Other A1 Retail Service	6		-
Overall Total	**32**		**-**

Source: Experian Goad 2012. * UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were nine vacant retail units within Tower Bridge Road giving a vacancy rate of 14.3%, above the national average of 12.1%.

The New Southwark Plan: Interim Consultation Report Responses

Respondents identified that Tower Bridge Road needs enhanced public transport options and that it currently lacks the appearance of a high street.

Summary of Tower Bridge Road's Strengths and Weaknesses

Strengths

- The centre has an above average provision of convenience retailers.
- The centre has a high number of independent traders.
- A number of bus routes serve the centre.

Weaknesses

- The centre is situated along a busy main road.
- The centre has very few comparison retailers and national multiple retailers.
- The number of A2 services is lower than the national average.
- The centre has a vacancy rate that is higher than the national average.
- The centre is not located near a underground or train station (the nearest being London Bridge or Elephant & Castle).
- Car parking is severely restricted during peak times.

Appendix 8 Household Survey Results

Household Survey Results

NEMS Market Research carried out a telephone survey of 1,500 households across the Southwark study area in August 2014. The study area was split into eight zones, based on ward boundaries. The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The survey established patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - Clothing and footwear;
  - Domestic electrical appliances;
  - Other electrical goods (TV, Hi-Fi and computers);
  - Furniture, soft furnishing and carpets;
  - DIY/hardware items and garden items;
  - Chemist, health and beauty items; and
  - Other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Last Main Food Shopping

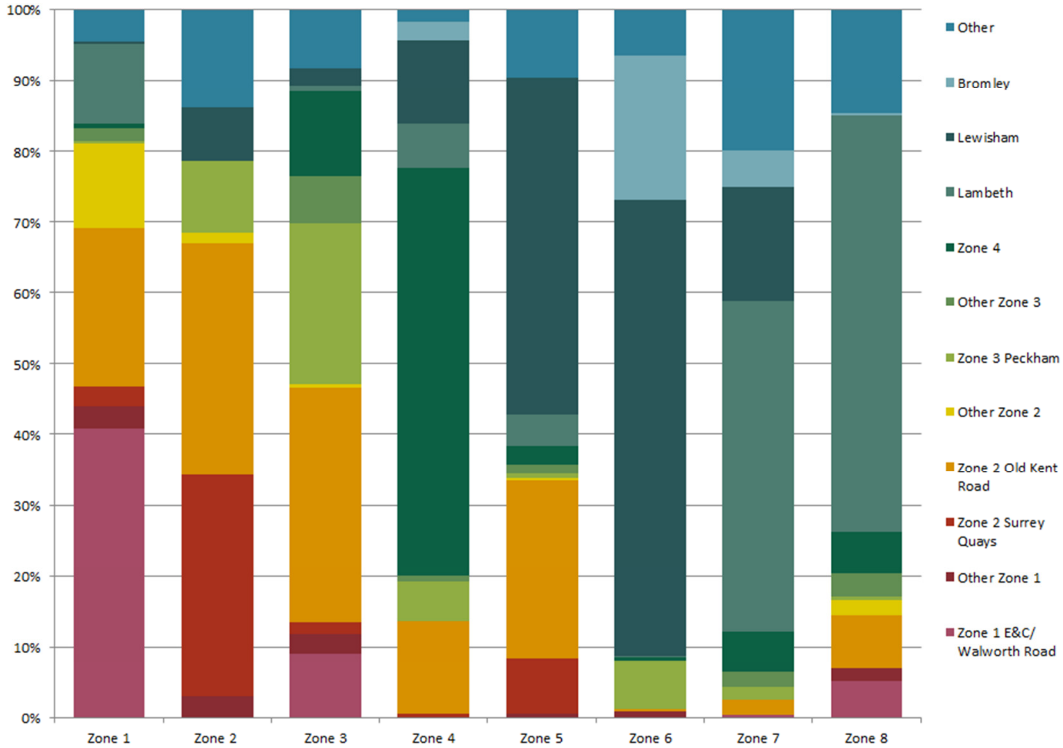
Respondents were asked where they last undertook their last main food and grocery shopping. Large food stores are the primary destination for main food shopping trips. The market share of main food shopping for each zone is shown in Figure A below.

Overall, the Asda on Old Kent Road was the most popular shopping destination for the study area as a whole (7.94%), followed by Sainsbury's on Dog Kennel Hill, Dulwich (7.32%), Tesco, Old Kent Road (4.72%), Tesco, Surrey Quays (4.46%) and Morrisons, Walworth Road (3.6%). The internet was used by 7.7% of respondents. Southwark North East (Zone 2) and Southwark South (Zone 4) have the highest market shares (66% and 58% respectively) of main food shopping within their local zones.

The four zones within the LB Southwark (Zones 1-4) all retain over 78% of main shopping trips within the borough, with Zone 3 (Southwark Central) retaining 89% of main shopping trips within the borough. LB Southwark attracts relatively few main food shopping trips from the outer catchment (Zones 5-8). LB Southwark attract 38% of main food shopping trips from Zone 5 (Lewisham North West) but only 8% of main shopping trips from Zone 6.

Most (84%) respondents in Zone 6 carried out their main food shopping trips in Lewisham or Bromley. Whilst most (63%) in Zone 7 do their main food shopping trips in Lambeth and Lewisham. Lambeth is the main (59%) destination for respondents in Zone 8.

Figure A: Last Main Food Shopping



Mode of Travel for Main Food Shopping

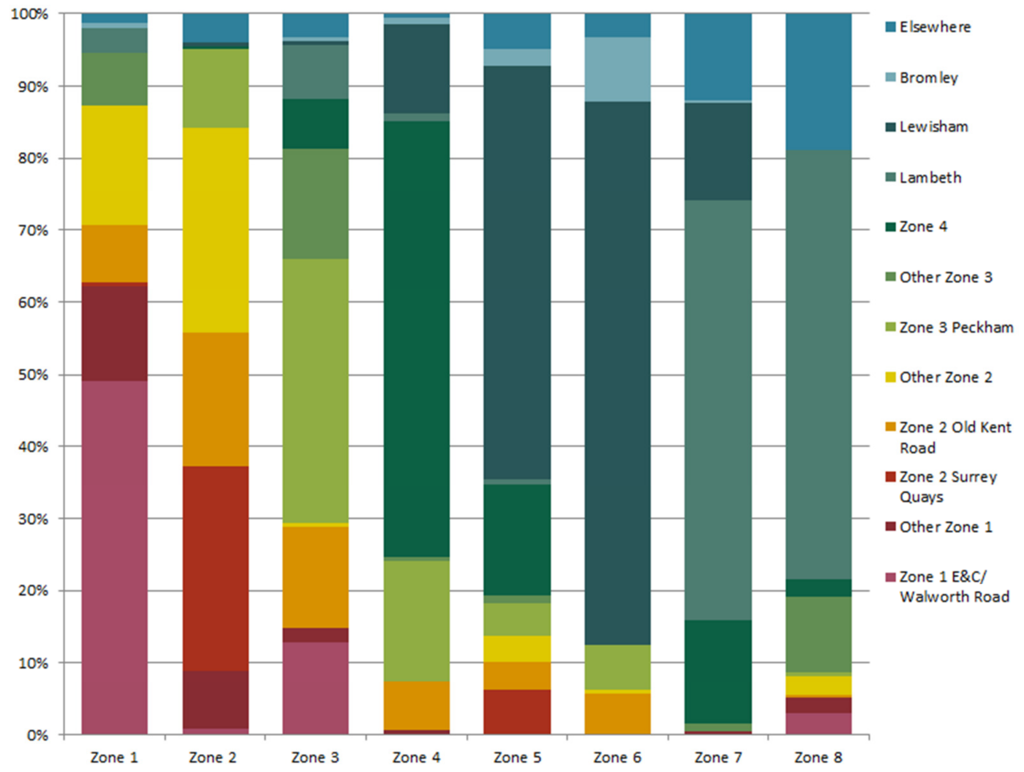
in the whole study area, 47.8% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is significantly below the NLP average derived from similar surveys across the country (74.6%). Just under 30% of respondents stated that they walk to do their main food shopping, significantly higher than the NLP average of 11.7%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. The market share of top-up food shopping for each zone is shown in Figure B below.

In total 75% of respondents across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The London Borough of Southwark catchment zones (Zones 1-4) all retain retail at least 85% of top-up shopping trips within the borough. The borough (Zones 1-4) attracts relatively few top-up food shopping trips from the outer zones (Zones 5-8).

Figure B: Top Up Shopping



Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, central London was the most popular destination with 23.8% of all respondents shopping there, followed by Old Kent Road (12.9%). 11.8% do most of their non-food shopping in the London Borough of Lewisham and 5.52% in Peckham.

Overall 10.8% of respondents buy most of their non-food shopping on the internet or have it delivered. The Southwark North West and Southwark North East zones (Zones 1 and 2) have the highest proportion of respondents who buy most of their non-food shopping on the internet with 17.8% and 17.1% respectively. The Lewisham South West zone (Zone 6) undertakes the lowest proportion of non-food shopping on the internet at 2.5%.

Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was car (driver and passenger) with 32.3% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was bus/coach with 30.2%, followed by walking with 21%.

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each category is shown in the graphs below.

Figure C: Clothing and Shoes

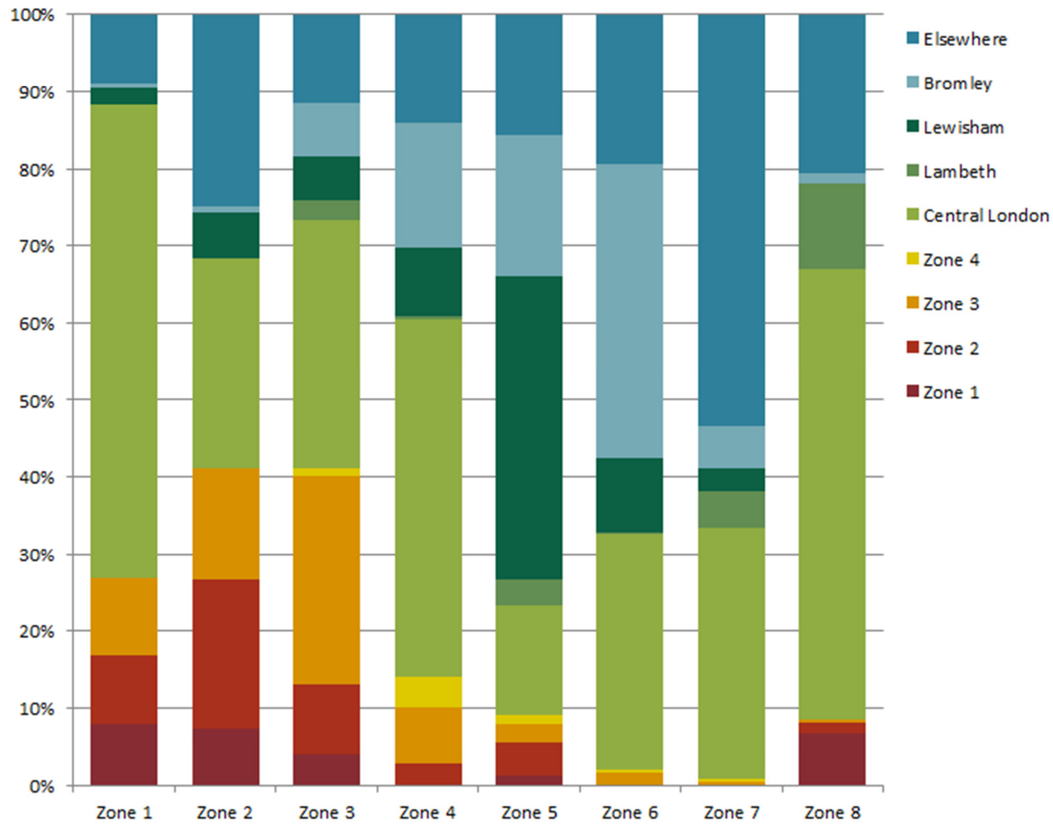


Figure D: Domestic Electrical Appliances

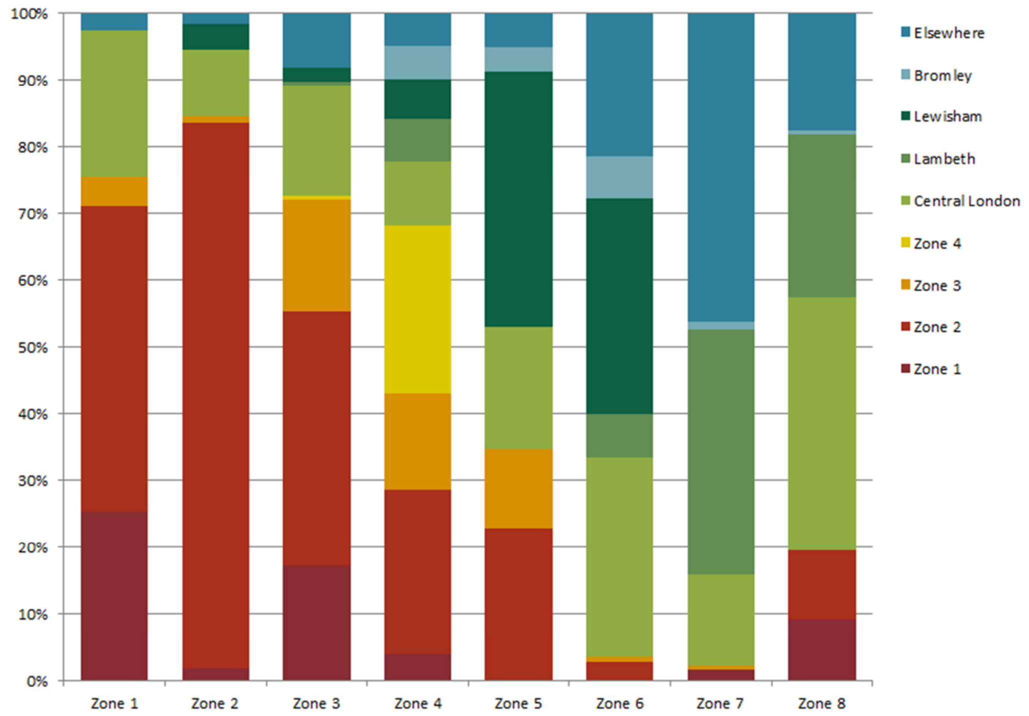


Figure E: Other Electrical Goods

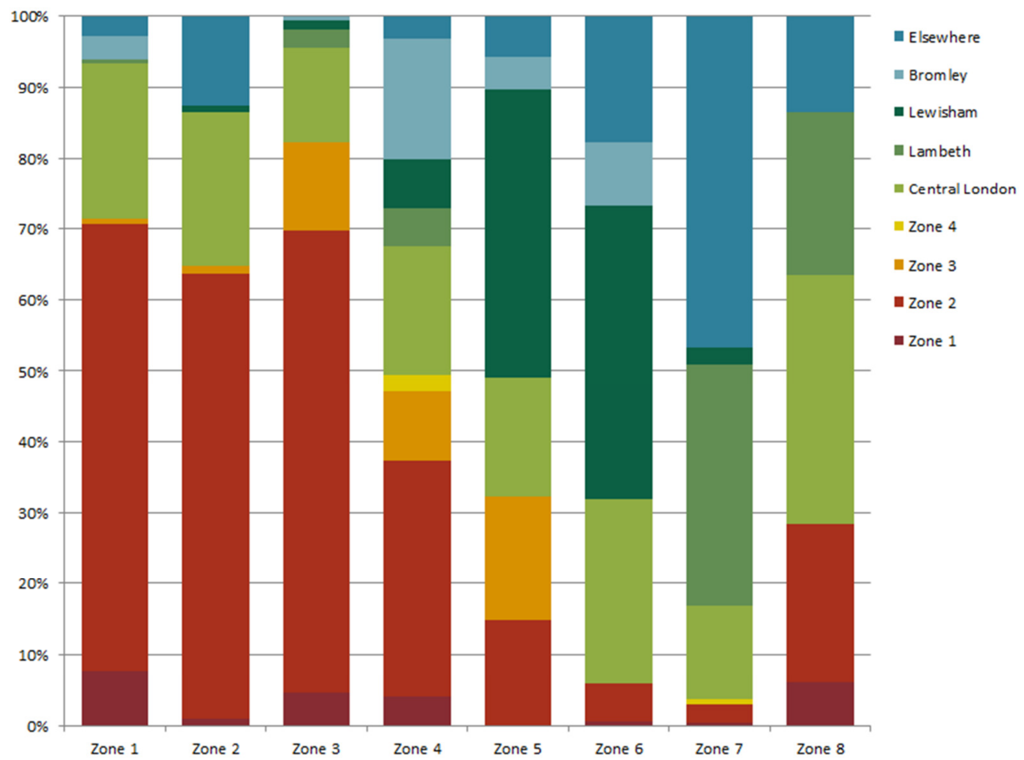


Figure F: Furniture, Soft Furnishings and Floor Coverings

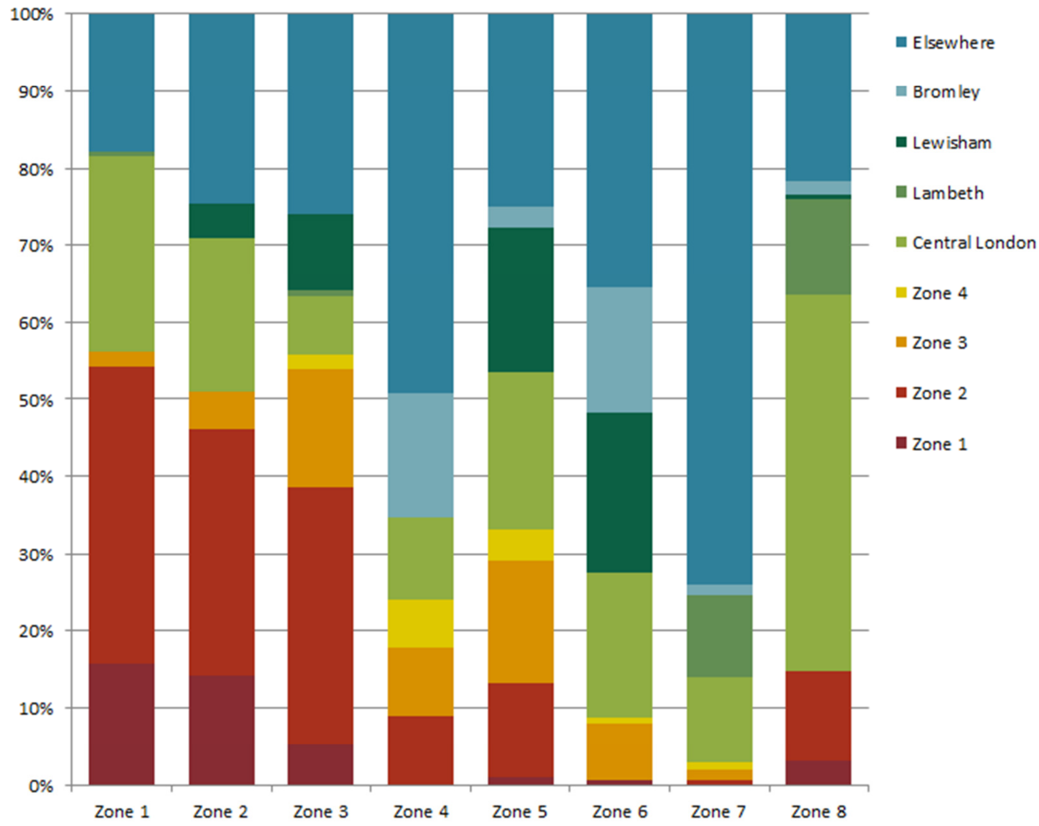


Figure G: DIY, Hardware and Garden Items

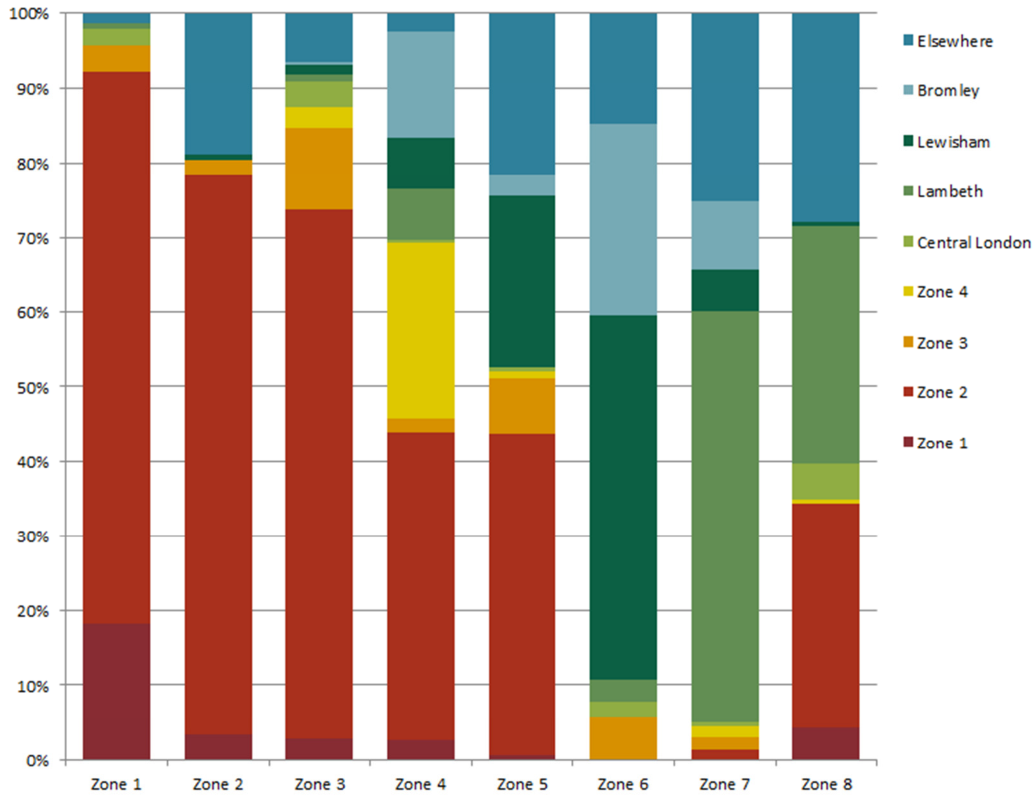


Figure H: Health, Beauty and Chemist

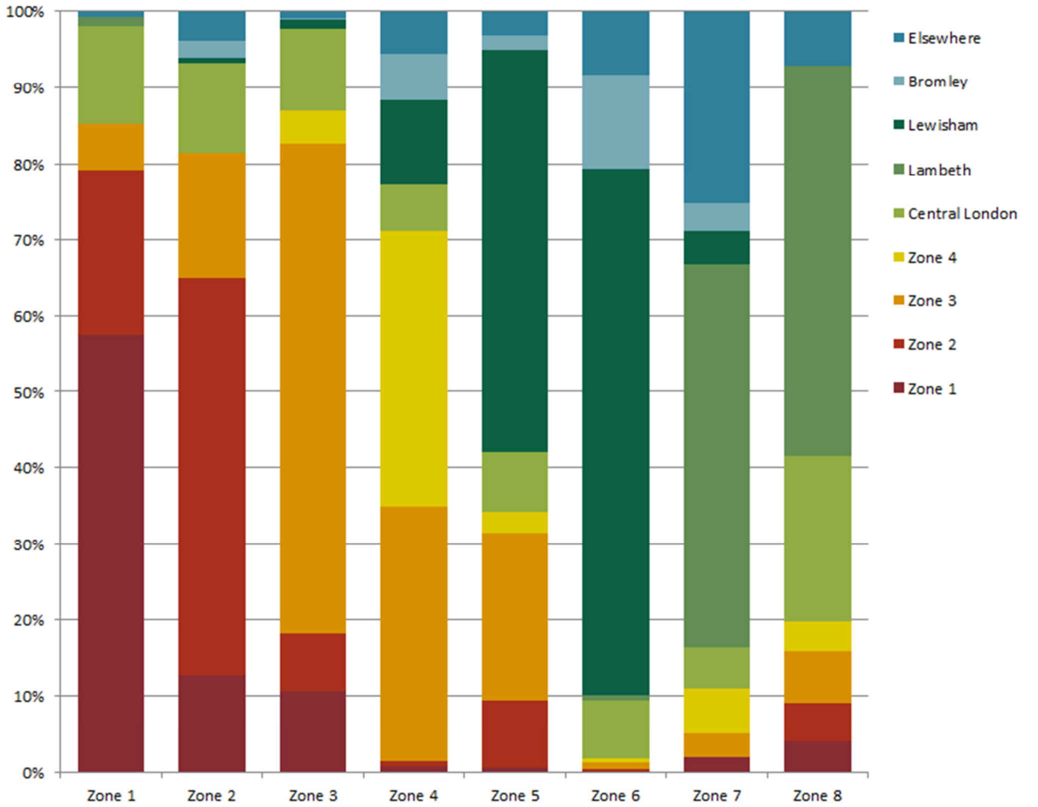
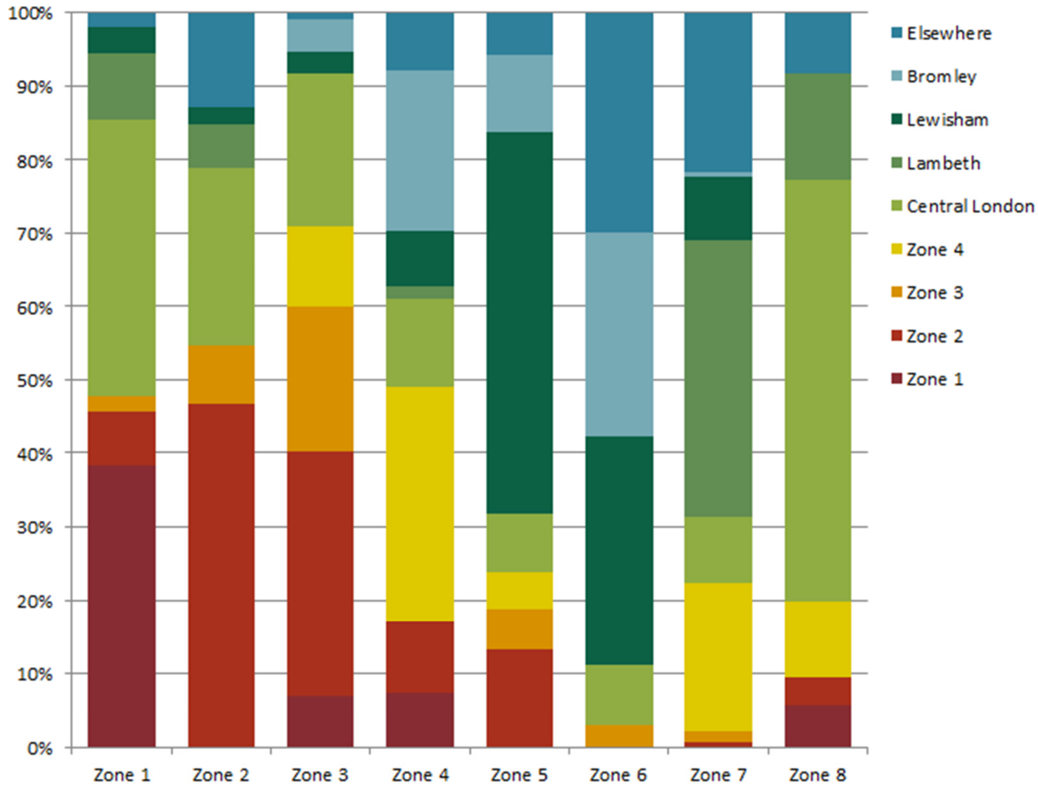


Figure I: Books, CDs, Toys and Gifts



Shoppers' Views

Respondents were asked what they liked and disliked about each of the centres within the borough. The results are summarised as follows:

- **Peckham:** 26% of respondents stated the centre had a good range of shops, 20% said it was close and convenient to their home and 13% like the shopping environment. When asked what they disliked 52% stated 'nothing', 7% said they disliked the lack of maintenance/cleanliness and 5% said there was a poor choice of shops.
- **Elephant & Castle:** 29% of respondents liked how close and convenient the centre is to their home, 14% said it had a good range of shops and 9.5% liked the bus services. When asked what they disliked, 43% of respondents stated 'nothing', 13% said it lacked good maintenance and cleanliness and a further 8% stated they did not like the shopping environment.
- **Walworth Road:** 31% of respondents liked how close and convenient the centre is to their home, 30% said it had a good range of shops and 10% liked the shopping environment. When asked what they disliked, 49% of respondents stated 'nothing', 6% were unhappy with the car parking provision and 8% said traffic/congestion.
- **Canada Water/Surrey Quays:** 28% of respondents liked how close and convenient the centre is to their home, 25% said it had a good range of shops and 10% liked the shopping environment. When asked what they disliked, 63% of respondents stated 'nothing', 11% said it had a poor choice of shops and 9% said it had a poor range of shops.
- **London Bridge:** 22% of respondents liked the shopping environment, 14% said it has a good range of shops and 12% of people said it had a good market. When asked what they disliked, 70% said 'nothing', 8% said traffic/congestion and 5% said it was too expensive.
- **Borough/Bankside:** 24% of respondents liked the shopping environment, 17% said it had a good market and 12% said it has a good range of shops. When asked what they disliked, 78% said 'nothing', 7% said it was too expensive and 3% said it was busy/noisy.
- **Lordship Lane:** 31% of respondents liked the range of shops, 23% liked the shopping environment and 14% cited a good range of shops. When asked what they disliked, 58% of respondents stated 'nothing', 10% said it was too expensive and a further 10% stated poor car parking provisions.
- **Camberwell:** 25% of respondents liked the range of shops, 20% said the centre was close/convenient to their home and 12% said it had good quality shops. When asked what they disliked 53% of respondents said 'nothing', 7% said traffic/congestion and 6% said it had a poor range of shops.

- **Old Kent Road:** 33% of respondents liked the range of shops, 20% said the centre was close/convenient to their home and 11% said it had good quality shops. When asked what they disliked 57% of respondents said ‘nothing’, 11% said traffic/congestion and 6% said they disliked the shopping environment.
- **Herne Hill:** 22% of respondents said it is close/convenient to their home, 22% like the shopping environment and 13% said it had a good range of shops. When asked what they disliked 61% of respondents said ‘nothing’, 9% said it was too expensive and 5% said traffic/congestion.
- **The Blue:** 32% of respondents liked how close/convenient the centre is, 19% like the shopping environment and 6% said it had a good market. When asked what they disliked 72% of respondents said ‘nothing’, 6% said it was too noisy and 5% said it was difficult to get to.
- **Dulwich Village:** 43% of respondents like the shopping environment, 21% said it had a good range of shops and 14% said it has a good choice of pubs / restaurants / cafes. When asked what they disliked 58% of respondents said ‘nothing’, 20% said it was too expensive and 5% said disliked the car parking provision.
- **Nunhead:** 35% of respondents said it was close/convenient to their home, 25% like the shopping environment and 24% said it had a good range of shops. When asked what they disliked 72% of respondents said ‘nothing’, 6% said it had a poor choice of shops and 4% said they disliked the traffic/congestion.

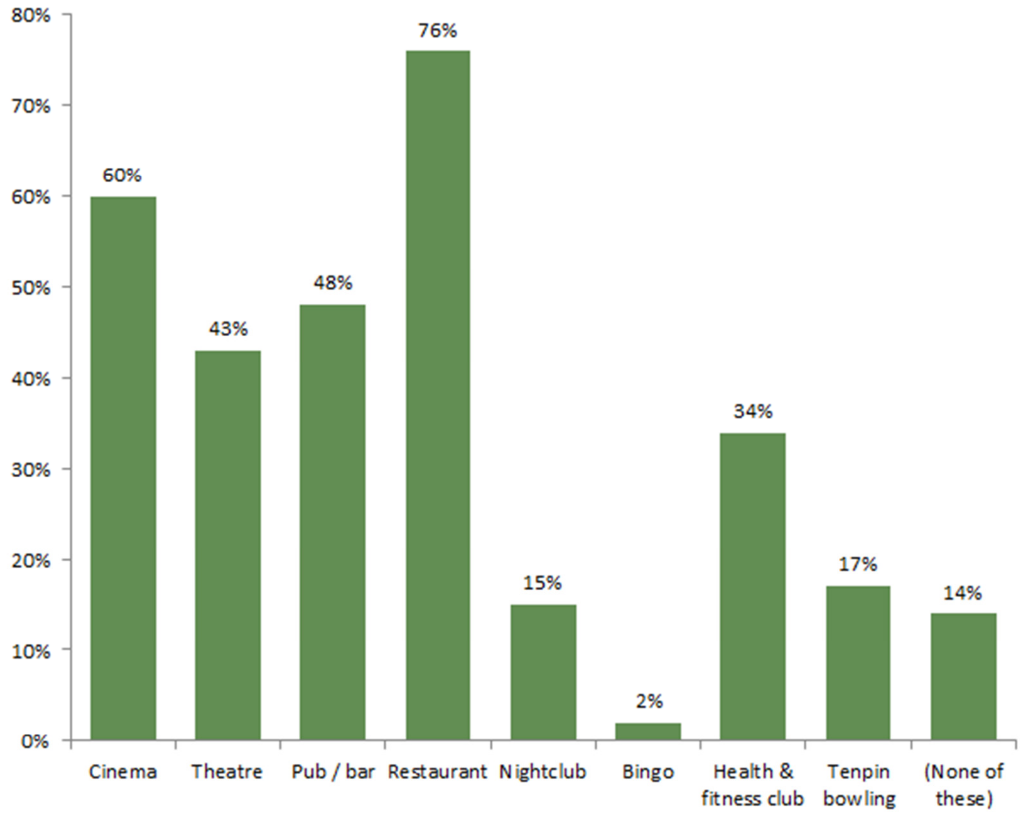
Internet Shopping

Respondents were asked what items, if any, do they buy on the internet. The most bought items were ‘books, CDs, toys etc’ which were bought by 39% of respondents. 34% bought clothes and shoes online, 22% bought electrical, TV, hi-fi and computer items, and 11% bought their groceries online. 24% of respondents stated they didn’t buy anything online.

Leisure Activities

Respondents were asked what leisure activities their family participate in. The graph below shows the most popular responses.

Figure J: Participation in leisure activities



Cinema

60% of respondents said they go to the cinema. The most visited cinema for respondents was the Odeon, Surrey Quays, with 22% of cinema goers revealing that they visited it for their last cinema trip. Other well used cinemas are the Peckham Multiplex (16%), the Brixton Ritzy (14%) and the Odeon North Greenwich (7%).

Theatre

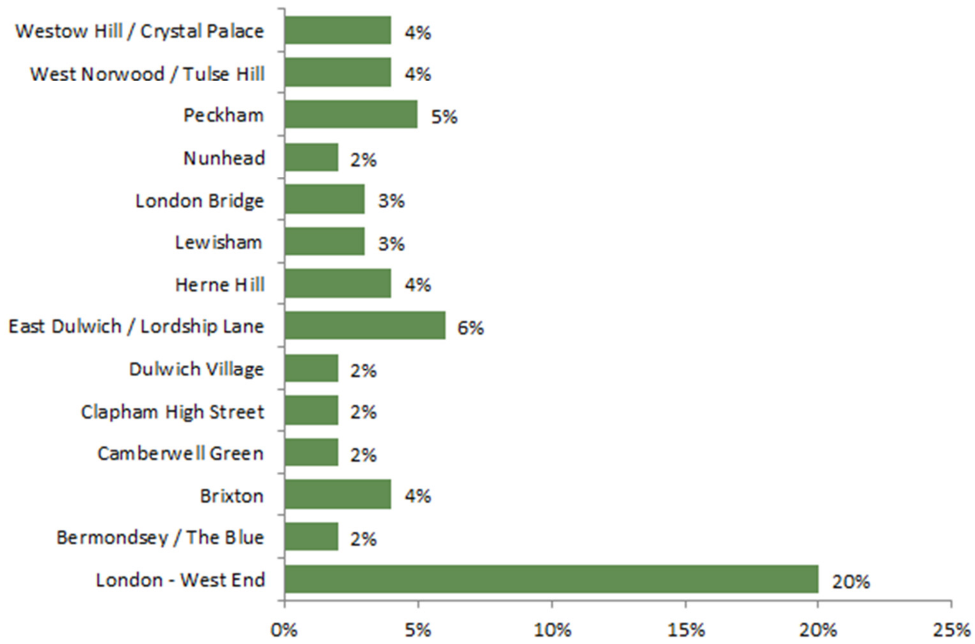
43% of respondents said they go to the theatre, with 74% of these citing central London/West End theatres as the last one they visited and 9% citing the Southbank Centre.

Pubs and Bars

The household survey asked respondents if and where they or their family last visited a pub/bar and 48% of respondents indicated that they visit pubs and bars. This is on a par with the NLP average from other surveys (47.5%).

Overall, 20% of pub/bar goers last used the pubs and bars of the West End. A more detail breakdown is shown below.

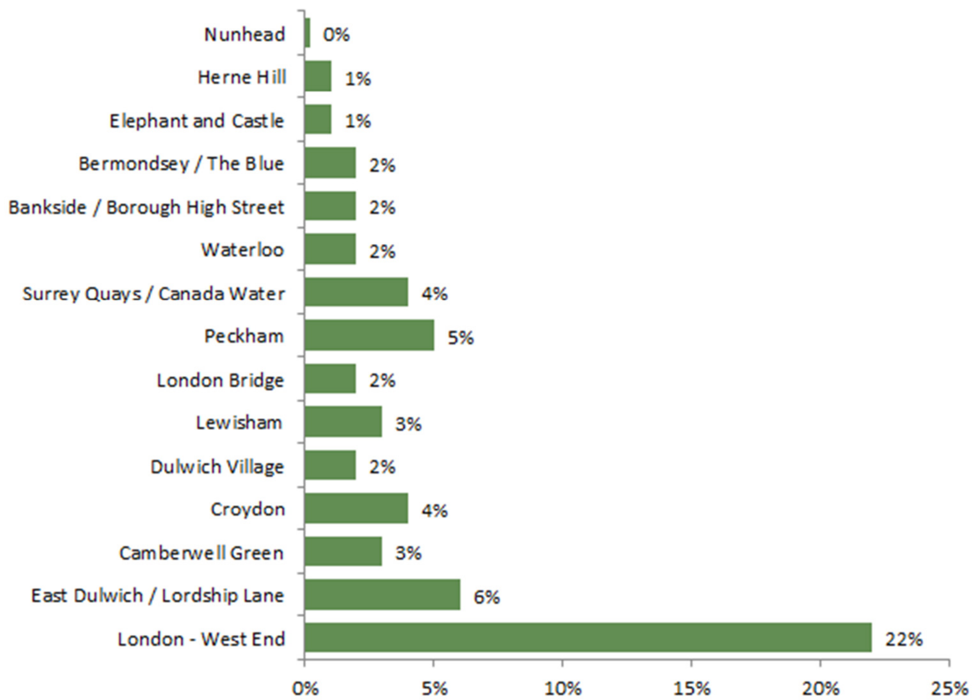
Figure K: Visits to pubs/bars



Restaurants

Overall 76% of respondents indicated they visit restaurants, making it the most popular leisure activity in our survey. This is above the NLP average for other surveys (67.9%). Of all respondents who visited restaurants, London West End (22%) attracted the highest proportion of respondents followed by Lordship Lane.

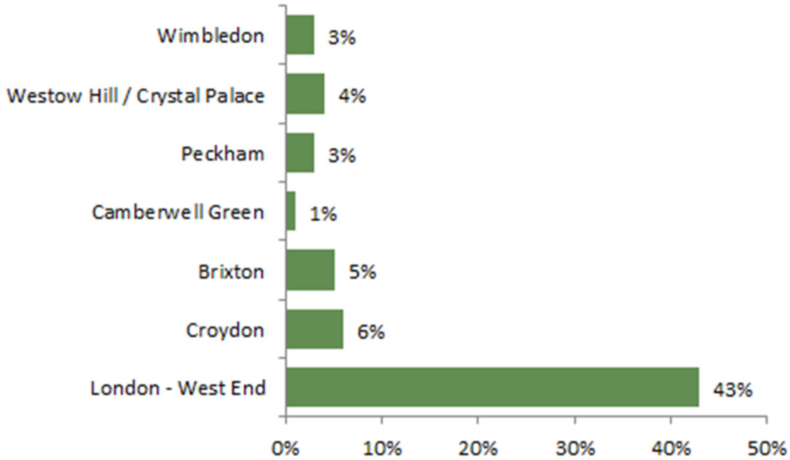
Figure L: Visits to Restaurants



Nightclubs

15% of respondents indicated that they visited nightclubs. This participation rate is higher than the NLP average from other similar surveys of 9.9%. The main location for respondents who visited nightclubs in the study area as a whole is the West End (43%) followed by Croydon (6%) and Brixton (5%).

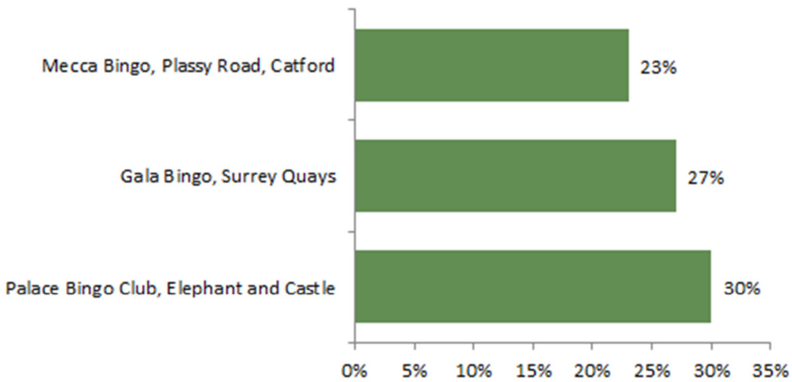
Figure M: Visit to Nightclubs



Bingo

Bingo facilities were visited by 2% of respondents. This figure is below the NLP average participation rate of 5.1% as derived from other similar surveys. The sample of bingo visitors within each zone is relatively small. However, the Palace Bingo Club in Elephant and Castle (30%) was the most popular place respondents went to play bingo, followed by Gala Bingo, Surrey Quays (27%).

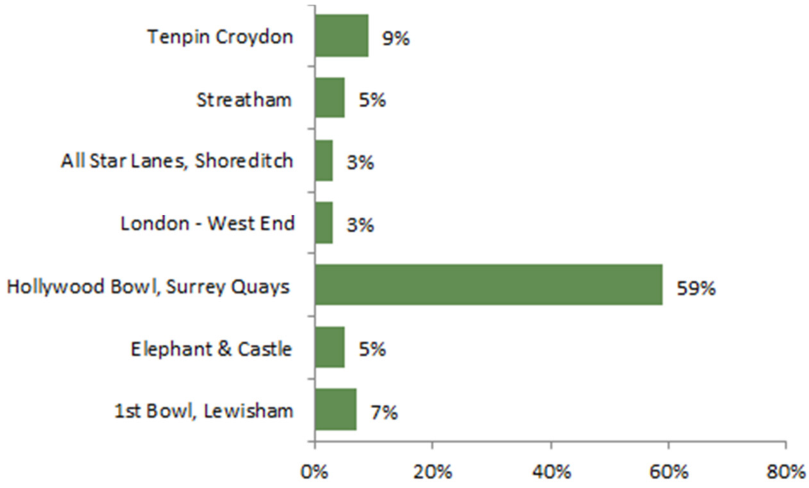
Figure N: Visits to Bingo



Ten Pin Bowling

Overall 17% of respondents indicated their household visit ten pin bowling facilities. The main destination was Hollywood Bowl, Surrey Quays (59%), followed by Tenpin Croydon (9%) and 1st Bowl, Lewisham (7%).

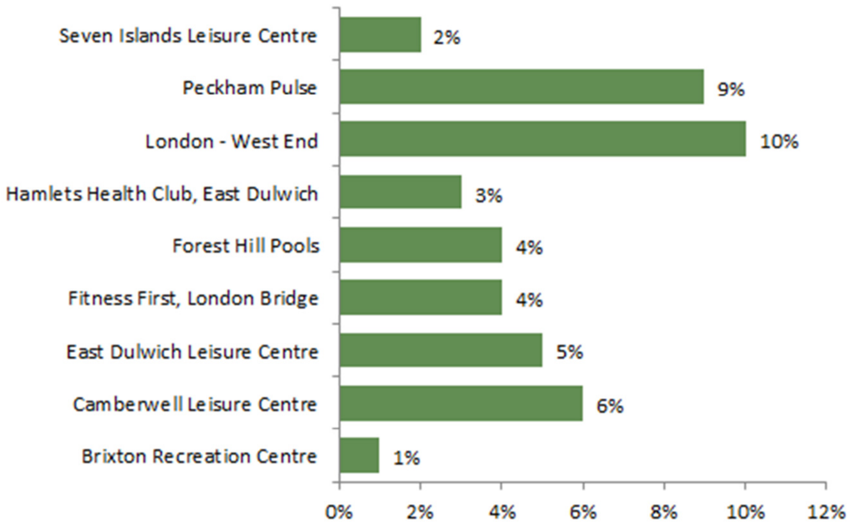
Figure O: Visits to Ten Pin Bowling.



Health and Fitness Clubs

34% of respondents indicated their household visited health and fitness clubs, which is significantly higher than the NLP average for other surveys (25.6%). The main health and fitness club destinations were facilities in the West End (10%), followed by Peckham Pulse (9%).

Figure P: Visits to Health/Fitness Clubs



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