Borough-wide Retail Needs Study Update 2008

Croydon Borough Council

December 2008

DRIVERS JONAS

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Croydon Borough Council

Plans

Appendices

Borough-wide Needs Study Update 2008 – Addendum (January 2009)

1.1 During the preparation period of this Study, major changes were occurring in the national economy and retail market. We cannot know whether these changes will have a material impact over the plan-period as a whole. However, it has become clear that the initial years of the plan-period will be affected significantly.

1.2 The two key factors that will impact on the findings of this Study in the initial stages of the LDF Plan period are:

- the rate of growth of residents' retail expenditure, and
- the retail market.

Retail Expenditure Growth

1.3 Our retail expenditure forecasts are described in Section 6 of the Report. Based on information from Experian (Retail Planning Briefing Note 5.0, November 2007), residents' expenditure has been increased from a base year of 2005 throughout the forecast period by a factor of +0.6% per annum for convenience goods and +4.8% per annum for comparison goods. A more recent Retail Planning Briefing Note 6.0 was published in November 2008, but the recommended growth rates in this Note are not materially different.

1.4 We have used Experian's 'ultra long-term' growth trend, which is based on average expenditure growth rates over the 30 year period 1967-2007. This rate therefore includes periods of buoyancy and recession within the economic cycle.

1.5 Because we have used growth rates derived from long term trends, we have no reason at present to question the forecasts over the long term. We do, however, have concerns about the position in the short term, particularly in respect of comparison goods, for which the growth rate is much higher and which are more influenced by changes in the national economy.

1.6 The economy is currently going into a downturn from which it may be expected to recovery slowly, as has happened in previous economic cycles. Retail expenditure replicates the state of the national economy. MapInfo Briefs are helpful in that they show year on year expenditure per head changes. MapInfo Brief 07/02 shows the following changes in expenditure per head during recessionary years in the early 1980s and 1990s:

	Convenience Goods	Comparison Goods
1980	-1.0%	-3.1%
1981	-2.2%	-1.0%
1982	-2.35%	+1.8%
1990	-0.3%	+1.4%
1991	-1.4%	-0.6%

1.7 The decline in retail expenditure per head experienced at times of recession in the 1980s and 1990s was offset by high growth rates in the buoyant years. A peak was reached in the 5 year period 1999-2004 when the lowest annual growth rate of comparison goods expenditure was +7.0% (2001) and the highest was +9.6% (2002).

1.8 Care is required when interpreting the position over the next few years, when plainly the average expenditure growth rates based on long term trends will not be achieved. In particular, based on experience from the recessionary periods of the early 1980s and 1990s, it is to be expected that expenditure per head in 2009 will decline. This will affect the expenditure forecasts to 2010 and 2015, the former in particular. By 2015 it is reasonable to assume economic recovery, which will offset to some degree the effects of the current recession.

1.9 It is also appropriate to consider the effect of changes in expenditure growth rates on estimates of turnover growth achieved by retailers on existing floorspace (sales density increases). It is reasonable to assume that increases in retailer sales densities are enabled by a growth of available expenditure. That being so, when available expenditure is static or limited, retailers are unlikely to be able to achieve sales density increases to any material degree. To some extent this will offset the negative impact of declining expenditure growth on forecasts of new floorspace requirements, as less expenditure is absorbed by existing floorspace.

1.10 In summary, because the Study uses long term average expenditure growth rates, the Council should be cautious when applying the Study forecasts in the early part of the plan Period; for example in assessing the short term impications of planning application proposals that they may receive. Linked to this retailers and the ‘High Street’ are under major pressure at the moment (see below), which is not reflected by the long term average expenditure growth rates generally adopted for retail planning purposes.

The Retailer Market / Centre Health Checks

1.11 The Study provides a health check of all the Borough town and district centre (excluding Croydon Metropolitan Centre), and a commentary on some of the smaller centres. The audits were undertaken in September / October, since when national economic changes have had a major impact on the retail market.

1.12 The health check findings remain valid, in particular the different roles, function and relative performance of the centres. However, it is relevant to highlight some of the changes at a national level that will impact on the centres.

1.13 The most high profile change has been the loss of Woolworths at the end of 2008. In addition to Croydon Metropolitan Centre, Woolworths were present in the district centres of Upper Norwood, Selsdon and New Addington; and the local centre of Addiscombe. Woolworths occupied one of the larger units and played an important role within these shopping centres. Because of their level within the Borough’s hierarchy, the demise of Woolworths represents a bigger loss for the district and local centres than in the Metropolitan Centre with its more diverse retail offer.

1.14 There have been casualties amongst other multiple retailers and more are forecast. However, representation by multiple traders is limited outside the Metropolitan Centre (and Purley Way retail parks), with independent retailers and services being more prevalent in the town, district and local centres. Unfortunately the independent retail sector is under equal, if not greater, pressure.

1.15 Trading in the Borough's town, district and local centres is therefore going to be difficult and the centres more vulnerable. Experian has recently expressed its views on the changes afoot. In January 2009 it predicted that 'UK centre vacancy rates would rise to rise to 15 per cent, or 135,000 outlets, by the end of 2009 - the highest ever recorded for the UK'. It went on the predict that 'the small market towns would be the hardest hit, as retailers continued to crumble under the strain of high costs and falling consumer demand'. There are similarities in size and function between the market towns to which Experian refers and the Borough's town and district centres.

1.16 Experian has portrayed graphically the testing financial environment within which retailers will be trading. In this difficult situation forecasts of long term growth and potential can be of limited relevance. Retailers future may be determined by immediate financial considerations.

1.17 Planning judgements and decisions will need to recognise this difficult situation, particularly as it affects independent retailers and services that have least access to the resources necessary to get through difficult times. The tools available to 'planning' may be limited; but the Council should ensure that any 'need', sequential approach, and impact assessments, undertaken in support of planning applications for new retail floorspace, are realistic in the short term as well as long term.

Drivers Jonas
January 2009

1. Introduction

1.1 This Study provides forecasts of shopping needs in Croydon Borough in the period up to 2020, with additional longer term forecasts covering the period to 2025. It focuses on needs and potential within the Borough's town, district and local centres. Forecasts of shopping needs and potential in Croydon metropolitan centre were provided for the Council by Drivers Jonas in studies undertaken in 2007 for the purposes of the Croydon Metropolitan Centre Area Action Plan (CMCAP) DPD. General references in the Study to the Borough's centres therefore do not include Croydon Metropolitan Centre.

1.2 The study is in part an Update of the Drivers Jonas Croydon Borough Shopping Needs Studies of 1998 and 2003. The 1998 DJ Study forecast shopping requirements in the Borough up to 2006. The 2003 Update provided a forecast of shopping needs within the Borough to 2011 for convenience goods and 2016 for comparison goods, with interim forecasts at 2006.

1.3 The principal objectives of this Study are:

- To inform and act as evidence base for the identification of issues and options and the selection of preferred options required for both the Core Strategy DPD and Site Allocations DPD for the Borough.

- To inform decisions on planning application proposals for retail development generally throughout the Borough.

1.4 The Report is in nine sections.

- Section 2 provides a review of current retail policy guidance.

- Section 3 and Plan 1 identify and describe the hierarchy of shopping centres within the Borough, in the context of shopping patterns within South London.

- Section 4 describes retail trends affecting local shops.

- Section 5 and Appendices 1 and 2 contain an audit of existing centres within the Borough.

- Section 6, Appendices 4 and 5 and Plan 2 identify and describe the catchment zones that have been used, their demographic characteristics, and forecasts of available retail expenditure.

- Sections 7 and Appendix 6 provide forecasts of the convenience and comparison goods expenditure potential of the Borough's town and district centres.

- Section 8 describes the issues and opportunities affecting each town and district centre.

- Section 9 describes our overall findings.

1.5 Drivers Jonas would like to acknowledge the valuable assistance provided by the officers of the local authority in supplying background information.

2. Retail Policy Guidance

2.1 The retail planning policy framework for the Borough is provided principally by the following documents:

- PPS1 - Delivering Sustainable Development, 2005;
- PPS6 - Planning for Town Centres, 2005;
- The London Plan, 2008;
- The South London Sub-Regional Development Framework, 2006;
- The Croydon Replacement UDP, 2006

2.2 We provide below a brief review of relevant guidance and policies within these documents.

PPS1 - Delivering Sustainable Development, 2005

2.3 It is a central goal of government policy to achieve sustainable patterns of development. This is addressed specifically in PPS1, which forms the backdrop for other guidance, in particular PPS6.

2.4 Paragraph 5 of the Statement requires that planning should facilitate and promote sustainable and inclusive patterns of urban development. Land is to be made available for development in line with economic, social and environmental objectives to improve people's quality of life.

2.5 Paragraph 27 sets out the considerations that Local Authorities should apply when preparing development plans, number (vi) which is to:

"focus developments that attract a large number of people, especially retail, leisure and office development, in existing centres to promote their vitality and viability, social inclusion and more sustainable patterns of development."

PPS6 - Planning for Town Centres, 2005

2.6 PPS6 was published on 21 March 2005. Sustainable development is the core principle underlying the guidance, particularly creating vital and viable town centres. The Government's key stated objective for town centres is to promote their vitality and viability by:

- *"planning for the growth and development of existing centres; and*
- *promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all."*

2.7 Other stated objectives are:

- *"enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups;*
- *supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and*

- *improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport."*

2.8 Other wider policy objectives of relevance to the application proposal are:

- promotion of social inclusion, ensuring inter alia that that deficiencies in provision in areas with poor access to facilities are remedied;
- encouraging investment to regenerate deprived areas, creating additional employment opportunities and an improved physical environment;
- promotion of economic growth;
- delivering more sustainable patterns of development, including reducing the need to travel and providing alternatives to car use; and
- promoting high quality and inclusive design.

2.9 Section 2 of Planning for Town Centres PPS6 published in March 2005 sets out specific requirements in respect of Local Plans, which because of their particular relevance we quote below.

"The Role of Plans at the Local Level

2.15 Local planning authorities should adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Having regard to the regional spatial strategy and reflecting their community strategy, local planning authorities should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.

2.16 Local planning authorities should work in conjunction with stakeholders and the community to:

- *assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;*
- *identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;*
- *identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres within their area;*
- *define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map (see Annex A);*

- *identify and allocate sites in accordance with the considerations set out below (paragraphs 2.28–2.51);*
- *review all existing allocations and reallocate sites which do not comply with this policy statement;*
- *develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities (paragraphs 2.55–2.59); and*
- *set out criteria-based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.*

2.17 In addition to defining the extent of the primary shopping area for their centres, local planning authorities may distinguish between primary and secondary frontages (see Annex A). These frontages should be realistically defined. Having regard to the need to encourage diversification of uses in town centres as whole, primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for flexibility and a diversity of uses. Where frontages are identified the appropriate local development documents should include policies that make clear which uses will be permitted in such locations."

2.10 PPS6 Annex 1 provides the following definitions of shopping centres,.

"Town centre

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas ……. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre."

In respect of shopping parades Annex A states:

"Small parades of shops of purely neighbourhood significance are not regarded as centres for purposes of this policy statement."

2.11 The following definitions of primary shopping areas and retail frontages are provided

"Primary Shopping Area

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

Primary frontage

Primary frontages are likely to include a high proportion of retail uses.

Secondary frontage

Secondary frontages provide greater opportunities for a diversity of uses."

2.12 We have had regard to the above requirements and definitions in undertaking this Study.

Proposed Changes to PPS6: July 2008, Consultation

2.13 Proposed changes to PPS6 were published for consultation in July 2008. Because the Proposed Changes are a consultation document only, limited weight can be attached them at this draft stage. However, we make brief comments on the Proposed Changes on the basis that at least some of the principles within the Draft document are likely to be carried forward into an approved Statement.

2.14 The Statement continues to support the well established town centres first approach. It also makes clear that town centre development planning is not just about the larger towns – clear, robust strategies for centres of different sizes should be prepared.

2.15 One of the major (and controversial) proposed changes is removal of the 'needs' test as a requirement in respect of planning applications for retail development in edge-of centre and out of centre locations. However, assessment of 'need' remains a key criterion in development plan making when assessing the scale of new retail development required.

2.16 Removal of the need test is proposed to be counter-balanced by a strengthened and broadened 'impact' test. In particular the Proposed Changes indicate that adverse impacts may be outweighed by positive impacts relating to wider economic, social and environmental benefits. The Statement is also linked to the objectives of draft PPS4 and the need to plan for sustainable economic growth and support employment creation.

2.17 Matters that were previously material considerations only have now been brought within the ambit of 'need'. For example, additional weight is attached to physical regeneration and the reuse of previously developed sites as important qualitative need considerations.

2.18 Another important shift of emphasis is a move from a long established principle of supporting competition, to the use of the planning system as an agent for specifically promoting/controlling competition. The introduction of a 'competition fascia test' is recommended by the Office of Fair Trading (OFT), but is excluded from the July 2008 Proposed Changes pending the outcome of a legal challenge brought by Tesco. If introduced a 'fascia test' will introduce a major new consideration for retail planning. To date planning has normally been concerned with land use and not the occupiers of new development.

The London Plan 2008

2.19 The Mayor's spatial development strategy for London, including the London Borough of Croydon is contained within The Consolidated London Plan, which was formally adopted in February 2008.

2.20 The Plan identifies five broad categories of town centre within London - international, metropolitan, major, district, and neighbourhood/local.

2.21 Croydon is classified as a metropolitan centre. The following centres within the Borough are classified as district centres, but also have the status of town centres in the Plan:

Purley; Thornton Heath; Upper Norwood; Norbury; South Norwood; Coulsdon; and Addiscombe.

2.22 The retail policies of the Plan are set out in Section 3D. Policy 3D1 requires all Boroughs to strengthen the wider role of town centres. It identifies a number of ways in which this can be achieved, which are:

- *"encourage retail, leisure and other related uses in town centres and discourage them outside the town centres*
- *encourage forms of development, operational practice and consumer behaviour which will help to reduce carbon dioxide emissions*
- *improve access to and within town centres by public transport, cycling and walking*
- *enhance the competitiveness and quality of retail and other consumer services in town centres*
- *support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing and their key role in developing a sense of place and identity for sustainable local communities*
- *require the location of appropriate health, education and other public and community services in town centres*
- *designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area*
- *encourage net additions to town centre capacity where appropriate to their role in the overall network*
- *undertake regular town centre health checks and integrated strategic and local consumer need and capacity assessments*
- *support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement Districts in appropriate locations and appropriate provisions to support the safety and security of town centres."*

2.23 The Plan (Annex 1) states that typically, district centres provide convenience goods and services for local communities. Some have developed specialist shopping functions, often as a result of their lower rents. Developing the capacity of district centres is seen to be critical to ensure access to goods and services at the local level, particularly for people without access to cars.

2.24 Policy 3D.2 provides a specification for DPD policies in respect of town centre development. DPDs should:

- *"assess the need and capacity for additional retail, leisure, commercial and other town centre development and reconcile these by making appropriate provision following the sequential approach outlined below*
- *relate the scale of retail, commercial and leisure development to the size and role of a centre and its catchment and encourage appropriate development on sites in town centres in the network. If no town centre sites are available in the network, provision should be made on the edge of centres in the network*
- *encourage additional comparison goods capacity in larger town centres and convenience goods capacity in smaller centres of appropriate scale, especially District centres, to secure a sustainable pattern of retail provision*
- *treat proposals for out of centre development or for intensification or expansion of existing out of centre retail facilities in line with Policy 2A.8*
- *manage existing out or edge of centre retail and other service provision in line with the sequential approach, seeking to reduce car dependency and traffic generation and to improve public transport access to promote more sustainable forms of development."*

2.25 Section 5 of the London Plan identifies 'Areas for Regeneration' in London. Paragraph 5.148 states makes the following comments in respect of the 'South West' sub-region.

"In the more central parts of the sub-region there is very substantial deprivation, including extensive Areas for Regeneration. Addressing the needs of these communities will be a very high priority for the sub-region. Parts of northern Croydon and Merton show particular problems and some large social housing estates (such as St Helier and Roundshaw in Sutton, New Addington in Croydon) feature in estate renewal programmes. A combination of new transport links to these areas, employment and training programmes, and capacity-building initiatives is needed to ensure that development within and beyond the sub-region benefits and assists in regenerating local communities."

2.26 We have had regard to the above guidance in undertaking this Study.

South London Sub-Regional Development Framework 2006

2.27 The Mayor's Sub-Regional Development Framework for South London was published in May 2006.

2.28 In paragraph 44 it states:

"In South London, population and consumer expenditure growth is generating very significant need for new retail space, in particular for comparison goods. Resident-based consumer expenditure in the sub-region on comparison goods is expected to almost double from £3.3bn to £6.5bn by 2016 and convenience goods expenditure is also expected to increase, but at a more modest rate of about 30% from £2.1bn to £2.7bn."

2.29 It goes on to note a high level of comparison goods floorspace need in Croydon in the period 2001-16. The majority of this is attributable to Croydon town centre – Annex 1. Annex 1 also identifies a comparison goods floorspace need of up to 1,000 sq m net in Coulsdon. These forecasts assume an average sales density of £4,000 per sq m and productivity growth on existing floorspace in the period 2001–16 of 2.0%-2.5%.

2.30 A lower level of convenience goods floorspace need is identified, which applies to South London as a whole. In respect of Croydon, Table 1C.2 identifies a floorspace need in the period 2001-16 of 3,000–11,000 sq m net based on an average convenience goods sales density of £5,500 per sq m, but with the floorspace range depending on whether a productivity increase of 0.5% or 1.0% is assumed.

2.31 The Framework states that:

"Whilst these estimates are the best available, they need to be treated with caution. Using their own local need assessments, boroughs should test the overall requirement for convenience floorspace taking into account qualitative need including the complexion of the existing retail offer, under/over-trading accessibility and the scope to make more efficient use of the existing stock. This will also require co-ordination with authorities outside London. Potential capacity within town centres should be exploited as a first priority in accordance with the sequential test and especially (although not exclusively) in District centres, which are particularly accessible to residents by sustainable modes of transport."

2.32 This advice is brought forward in Action 1 C (i), which states:

"When making provision for anticipated retail demand in LDFs, boroughs are asked to undertake fine-grained assessments of need and capacity taking into account the indicative sub-regional and borough need for new comparison and convenience goods retail floorspace to 2016 in Annex 4, Tables 1C.1 and 1C.2."

2.33 This Study responds to the need for further assessments identified in the Sub-Regional Development Framework. In particular we have focussed on the needs and requirements in centres individually, rather than providing Global assessments for the Borough as a whole.

Croydon Replacement UDP 2006

2.34 The Croydon Replacement Unitary Development Plan (UDP) was adopted on 13th July 2006.

2.35 Policy SP23 states that:

"The Council will seek to maintain and enhance the vitality and viability of its hierarchy of town centres within the Borough supported by a network of Shopping Parades. The town centres are the preferred locations for retail development and such development is encouraged there. The scale of any

shopping development should be appropriate to the size and function of the centre."

2.36 The UDP defines the hierarchy of centres as set out in the table below.

Centre Classification	Name of Centre
Metropolitan Centre	**Croydon Metropolitan Centre (formerly known as Central Croydon Town Centre)**
Town Centres	**Coulsdon** **Norbury** **Purley** **Thornton Heath**
District Centres	**New Addington** **Selsdon** **South Norwood** **Upper Norwood**
Local Centres	**Addiscombe** **Brighton Road, South Croydon** **Broad Green** **Hamsey Green** **Pollards Hill** **Sanderstead** **Shirley** **South Croydon** **Thornton Heath Pond**

2.37 There are some differences between the UDP hierarchy identified above and that in the London Plan. Addiscombe is defined as a District Centre in the London Plan, but a Local Centre in the UDP. Also the London Plan has no designation for New Addington and Selsdon, which the UDP designates as District Centres. We provide our views on the role and function of centres and their appropriate position in the retail hierarchy in Section 8 of the report.

2.38 More specific guidance on appropriate locations for new retail development is provided in Policies SH1 and SH2. Policy SH1 states that:

"Retail development will be permitted within the primary shopping areas of the Metropolitan, Town, District and Local Centres defined on the Proposals Map provided that it is of an appropriate scale."

2.39 Policy SH2 requires that retail proposals outside primary shopping areas (PSAs) satisfy tests relating to – need, scale, sequential approach, impact, and accessibility.

2.40 Policy SH3 deals with conditions to be imposed in on developments outside the defined PSAs.

2.41 Policies SH4 and SH5 deal with controls on development imposed within the main and secondary shopping frontages respectively.

2.42 Policies SH6 and SH7 seek to protect the role of shopping parades and convenience shops respectively.

2.43 The UDP Glossary of Terms provides the following definitions:

"Town Centre

The type of town centre which is a focus for shopping, medium to large commercial activities and community facilities outside Croydon Metropolitan Centre with potential for further development and intensification.

District centre

type of town centre which is a focus for shopping, particularly food shopping, smaller commercial activities and community facilities and community outside Croydon Metropolitan Centre and the Town Centres.

Local Centres

type of town centre which is a focus for day-to-day shopping and small scale commercial and community activities outside Croydon Metropolitan, the Town and District Centres.

Shopping Parade

a cluster of 5 or more units in Shopping Area uses (A1, A2, and A3), the majority of which are shops (Class A1) outside Croydon Metropolitan, the Town, District and Local Centres which provide for the shopping needs of a very local catchment."

2.44 The use of the phrase 'town centre' in the introductions to the definitions of District and Local Centres is confusing. We presume that it is meaning 'shopping centre'.

Findings

2.45 The following key points arise from our consideration of national retail guidance and the spatial strategy for London.

(i) A key objective arising from planning policy is the requirement to achieve sustainable patterns of new development.

(ii) The hierarchical definition of shopping centres within the Borough has important ramifications for centres. PPS6 places emphasis on steering new retail development to town centres. There are some inconsistencies in the references to 'town centre' in the UDP, which could usefully be rectified in LDF documents.

(iii) Within shopping centres the definition of 'primary shopping areas' also has important policy implications, including assisting in defining 'edge-of-centre locations.

(iv) Both PPS6 and the London Plan indicate matters that should be addressed in local planning documents, including:

- assessing the need and capacity for additional retail development;
- identifying deficiencies in provision and assessing the capacity of existing centres to accommodate new development;
- setting out criteria-based policies for assessing and locating new development proposals.

3. Retail Hierarchy

3.1 This section is similar to that in the DJ Borough-wide Study 2003 and identifies the number and range of shopping centres within the Borough and explains their role within the shopping centre hierarchy. There is also reference to competing centres outside the Borough. Centres within the Borough are indicated on Plan 1 (taken from the adopted Croydon UDP 2006).

Croydon Metropolitan Centre

3.2 Croydon Metropolitan Centre is the largest and dominant shopping centre within the Borough. It contains over 180,000 sq m gross retail floorspace and its catchment area extends beyond the administrative boundary into neighbouring Boroughs and Districts.

3.3 The London Plan states that Croydon is already recognised as London's largest metropolitan centre; and supports its expansion as a retail centre.

3.4 The Croydon UDP states that the currently defined Croydon Metropolitan Centre is the preferred location for new retail development. It is a UDP strategy to rebrand the offer of Croydon and move the centre into the top 15 shopping centres in the country.

3.5 The primary shopping area of the metropolitan centre is focussed on the Whitgift Centre developed in the 1970s, North End, and the Drummond Centre opened in 2004.

3.6 The centre contains a large number of national multiple retailers, although its comparison retail offer is mostly mainstream. It generally lacks the quality retailers within the upper end of the fashion spectrum that can typically be found in regional centres. At present, the upmarket fashion provision is largely confined to department store concessions.

3.7 Convenience shops include Sainsbury's, Somerfield and Iceland supermarkets, as well as Marks & Spencer and House of Fraser food halls.

3.8 The major retail proposal within the centre is the consented Park Place scheme, which is planned to bring about a wide range of benefits for the Centre as a whole, including a new anchor department store.

Major Competing Centres

3.9 Within South London there are a large number of shopping centres, which form a complex network. Some of these centres compete with Croydon Metropolitan Centre.

3.10 Bromley to the east and Sutton to the west are the nearest 'metropolitan' town centres, which compete with Croydon. Kingston, which lies further to the west, is less accessible but also attracts shoppers from the Croydon area.

3.11 Kingston is the strongest of these competing centres, having some 130,000 sq m of town centre floorspace (Promis). It contains John Lewis and Bentalls, and a Heals store which opened in 1999. Bromley is similar in size to Kingston and contains a Debenhams department store. It has a large successful covered shopping centre (The Glades) and a superior shopping offer to Croydon. Sutton is less strong. It contains Marks & Spencer and its offer is considerably more limited than that of Croydon.

3.12 London's West End attracts shopping trips from all parts of London, including Croydon. The West End can be reached in just over half an hour by public transport from East Croydon Station. The West End is clearly attractive for some occasional high spending shopping trips as well as more regular weekday shopping undertaken by those employed in Central London.

3.13 The Bluewater shopping centre, off the M25 in Kent, opened in Spring 1999 also attracts some comparison shopping expenditure trips by Croydon residents, particularly from the southern part of the Borough. It contains some 1,578,000 sq m gross retail floorspace (Promis), with John Lewis, House of Fraser and Marks & Spencer as anchor traders, as well as a large number of quality comparison shops.

3.14 Although trade is lost from the Borough to competing centres and free-standing stores, this is offset by inflows of trade from outside the Borough, particularly to Croydon Metropolitan Centre, the Purley Way retail parks, and those district centres that lie close to the Borough boundary.

Town and District Centres

3.15 As noted in Section 2, there are four UDP defined town centres within the Borough – Coulsdon, Norbury, Purley, and Thornton Heath; and four UDP defined district centres - New Addington, Selsdon, South **Norwood, and Upper Norwood.**

3.16 Each of these centres contains a food supermarket and they generally provide goods and services for local customers. In the northern part of the Borough, the district centres serve high density residential areas. In the southern part of the Borough, Coulsdon and Purley district centres serve lower density suburban areas. The lesser populated eastern part of the Borough (east of the main railway line) does not contain a UDP defined district centre and relies on local centres and parades for its shopping needs.

3.17 All the town and district centres within Croydon are served by bus routes and most are within a short walking distance of a railway station.

3.18 Several of the district centres lie close to the Borough boundary and therefore attract a proportion of their trade from adjoining areas.

Local Centres

3.19 The nine UDP defined Borough local centres provide shops and services predominantly for local customers. The centres have between 3,500 – 10,000 sq m gross shopping and service floorspace. Only South Croydon has in excess of 10,000 sq m gross floorspace. Car-borne shopping trips occur, particularly within those centres which have car parks and available on-street parking. Many shoppers also visit by foot from surrounding residential areas.

3.20 Five of the local centres are situated along the A23/A235 (Brighton Road) in a linear pattern. The remaining local centres serve the more suburban residential areas in the southern and central parts of the Borough.

Shopping Parades

3.21 The Borough Council has also identified a large number of shopping parades that are spread across the whole Borough. They typically consist of between two and twenty shops and contain a high proportion of convenience and service outlets. They mainly cater for residents visiting by foot.

Purley Way Retail Parks

3.22 Purley Way contains a number of large retail warehouses selling a range of comparison goods. The comparison goods outlets mostly sell bulky goods such as, furniture, carpets and DIY products. However, a number of non-bulky outlets have opened in Valley Retail Park and Valley Park Leisure Park in particular.

3.23 Within the Borough there are also some free-standing retail warehouses selling comparison and convenience goods. Like the retail parks, this type of retail format often generates separate shopping trips.

Convenience Foodstores

3.24 The principal large convenience foodstores within the Borough are at Purley town centre (Tesco), Purley Way retail parks (Sainsbury), Crystal Palace Football Ground (Sainsbury), and Thornton Heath district centre (Tesco). Recent foodstore developments include a Waitrose in Sanderstead and a new Sainsbury's in Selsdon.

3.25 There are also some large convenience foodstores close to, but beyond the Borough boundary, which draw trade from Borough residents. To the north Sainsbury Streatham, a freestanding store on the A23, is a popular destination for residents of the northern part of the Borough. Tesco Elmers End and Asda Marlow Way are both freestanding stores that perform a similar role for residents in the north eastern and western parts of the Borough respectively. Sainsbury Warlingham lies outside Warlingham shopping centre and draws trade from residents of the southern part of the Borough. West Wickham centre lies within 700m of the Borough boundary in Bromley to the east. It contains Sainsbury and Safeway foodstores, which draw trade from Croydon Borough residents.

4. Retail Trends affecting Local Shops

4.1 Retailing is a dynamic industry. A considerable amount of research has been published on changing trends as they affect different sectors of the retail market. We summarise here those trends that we believe are likely to be of most significance in planning for new retail development within the Borough outside Croydon Metropolitan Centre. We focus on the historic context and changes affecting convenience shopping facilities, as shopping for convenience goods is the principal activity at most local shopping centres.

Shopping Parades

4.2 Shopping parades were the traditional focus for local shopping trips. However, for a lengthy period of time this form of shopping provision has been under pressure and subject of change. The 1950s and 1960s were the heyday of the local shopping parade, typically a terrace of small units built as an integral part of a housing estate, and located within walking distance of most catchment residents. Typical occupants of parades developed in this era, some of which remain, are - small grocery store, CTN/sub post office, butcher, greengrocer / florist; hair stylist, and fast food take-away.

4.3 In the last twenty years or so many of these small traders have become unviable, and the range of convenience goods purchased in supermarkets has widened. Independent butchers shops for example are far fewer in number.

4.4 Some of the shopping parades in Croydon illustrate the problems that are faced by small independent traders, and the changes that are taking place.

Large Foodstores

4.5 By the 1970s large food supermarkets were providing for a different type of shopping trip – the purchase of a large number of goods less frequently with the motor car being the predominant mode of transport. Changes within society drove these changes such as the growth in the numbers of women with occupations outside the home; more widespread use of refrigerated food products; higher levels of car ownership, etc.

4.6 Operator requirements, in particular large sites with high accessibility by motor car, led to many large foodstores being located in freestanding 'out-of-centre' locations. This was particularly the case in the 1980s when planning consents in such locations were easier to obtain. In the last 15 years or so planning policy has been more pro-active in steering large foodstores towards 'in-centre' locations. Many of Croydon's district centres are anchored by large foodstores, e.g. the Tesco stores at Thornton Heath and Purley. Sainsbury, Trafalgar Way is an example of a freestanding store within an 'out-of-centre' locations.

4.7 The expansion of large supermarket trading may now be becoming offset to some degree by the benefits of local shopping facilities for purchases of small quantities of goods, as congestion in and around large stores has become greater. However the dominance of the grocery market by large foodstores, in particular Tesco, has caused the matter to be addressed by the Office of Fair Trading (OFT).

4.8 In their Report of April 2008 the Competition Commission has recommended the introduction of a 'competition fascia test' within the planning system, as a means of preventing over-dominance of local areas by specific operators.

Discount Foodstores

4.9 Since the 1990s another addition to the range of foodstore provision, has been the discount foodstore. The principal operators are Aldi, Lidl and Netto. These stores seek to attract the most price-conscious shoppers, and their business model is to limit the number of product lines in the store, but to sell them at the maximum discount. Discount stores typically have up to 2,000 sq m gross floorspace.

4.10 Because of their niche style of trading with a limited range of goods, discount foodstores have a relatively wide catchment akin to that of a district centre in terms of shopping hierarchy. Generally they fulfil more than a neighbourhood function.

4.11 Within the Borough, Aldi is located within Selsdon District Centre and Lidl trade at Broad Green. Although the latter is not currently classified as a district centre, it is near to Croydon Metropolitan Centre and has a wide catchment.

Decline of the Independent Convenience Shop

4.12 The decline of the small independent retailer and the growth of multiple shops has been a topical issue for some time, particularly in respect of food trading. Recent research from Experian shows that independent shops as a percentage of the total number of outlets declined from 70.6% in March 2001 to 68.7% in March 2006. Also the latest estimates show that Tesco, Sainsbury, Asda, and Morrisons now control 74% of grocery sales.

4.13 The facts are clear - an increasing proportion of the retail market is taken by multiples, as opposed to independent traders. Cause and effect are less easy to identify. The decline of the independent butcher for example, may also be caused by changing lifestyles and diet, as well as direct competition from multiple supermarkets.

4.14 Ironically it may also be that the recent success of planning policy in pushing the multiple foodstores back into town centres is actually creating bigger problems for town centre independent traders. The town centres are clawing back more residents' expenditure overall, but it is being attracted to the multiple foodstores with the independent food traders experiencing greater impact.

Verdict Findings on Neighbourhood Retailing

4.15 A recent report by Verdict 'Neighbourhood Retailing 2008' says the following:

"Neighbourhood locations cater almost exclusively to the local populace. Stores in neighbourhood locations provide convenient sites for top up, meal solution and distress purchases. Consequently, retailers in the neighbourhood are less subject to comparison shopping than those elsewhere, which is an important distinction between this channel and the town centre. The comparatively small average store size and high number of independent operators are distinctive features.

The most prominent retail sectors in neighbourhood locations are grocers and convenience stores, off-licences, food specialists, pharmacies, CTNs and petrol forecourts (which we class as either c-stores or CTN's), though a *number of more niche focused – typically independent – retailers also trade from neighbourhood locations."*

4.16 Verdict goes on to say:

"Convenience stores and small grocers dominate neighbourhood retailing, accounting for around half of all sales made each year in the neighbourhood. Over the last five years Tesco and Sainsbury have moved into neighbourhood locations, and their product offers and retail brand names have boosted sales in the location and provided a real threat to smaller multiples and independent c-store retailers.

The presence of the major multiples in the c-store market has forced smaller players and independent retailers to improve their propositions. Many have sought help from a symbol group operator. These groups provide retailers with a group fascia above their doors and a variety of services designed to help grow their sales.

Key initiatives of symbol groups are to encourage stronger ranges – including increased fresh food allocations – and improved store environments. Yet, surprisingly, members can be reluctant to invest, leaving symbol group stores disparate in quality of fitout, ranging and service.

Though consolidating quickly, the convenience store market remains fragmented and there are opportunities for smaller and independent retailers. These businesses have the flexibility and closeness to local markets that larger multiples find difficult to achieve. Examples of this include the number of independent c-stores which provide ethnic and non-UK food to local customers. This includes produce of Asian and Polish origin.

Over recent years c-store operators have targeted petrol station forecourts. Their long opening hours, convenient locations and high regular footfall make them highly attractive. Spar and Tesco in particular have increased their forecourt estates substantially over the past few years while Costcutter has expanded its forecourt stores in partnership with Murco."

Pharmacies

4.17 Verdict notes that the pharmacy market has grown strongly in the last decade by some 75%, compared with 50% for retail spending as a whole. As the UK population profile ages, consumers are increasingly using pharmacies as their first port of call for healthcare. In addition pharmacy purchases offers retailers the opportunity to sell associated ranges, particularly OTC products, although this requires special skills.

4.18 Verdict notes that:

"The deregulation of the pharmacy market in 2004 led to licensing controls being relaxed in April 2005, making it much easier for certain businesses to gain an NHS pharmacy licence. Operators can apply if they are to open for 100 hours or more per week, are based in either large (more than 15,000 sq m – 161,400 sq ft) out-of-town shopping developments or in one-stop primary care centres, or if they will operate solely as a mail order or Internet channel. This move aims to improve access to facilities and make potential savings from increased competition.

Supermarkets in particular have taken advantage of these changes to open new pharmacies and offer more services. These stores are providing services to the community such as health checks and GP services.

Smaller independent pharmacies face an uncertain future. The continued expansion of grocers and larger pharmacy chains will place them under more pressure while smaller pharmacies also face a drop in funding. From March 2008, pharmacies which dispense between 1,100 and 2,119 items per month will no longer receive the Protected Professional Allowance, losing up to £1,500 in funding per month."

4.19 The above issues affecting neighbourhood food and non-food retailing are of relevance to the potential for retail provision in Croydon local centres.

Growth of Out-of-centre Retail Facilities

4.20 Out-of-centre retailing really came to the fore in the UK in the 1970's. The focus was on superstores retailing grocery products, and non-food retail warehouses selling bulky goods. The commercial rationale for out-of-centre foodstores was larger floorspace areas to accommodate a wider range of goods purchased less frequently, and the need for ample adjacent car parking. The rationale for non-food retail warehouses selling bulky goods was also the large floorspace areas required to display such goods (DIY, carpets, furniture, etc) and that it was not possible or viable to provide such space in town centres.

4.21 Out-of-centre retail formats have evolved significantly since then. Superstores have grown enormously in size. The Sainsbury store at Purley Way (7,432 sq m gross) and Asda Store at Marlowe Way (7,856 sq m gross) and are examples of this; as is and Tesco at Purley (9,540 sq m) gross in an edge-of-centre location. The latter two stores stock a wide range of comparison goods including clothing and footwear.

4.22 Out-of-centre provision has expanded rapidly. The substantial number of 'bulky goods' retail warehouses, as well as unrestricted Class A1 retail uses, at Purley Way retail parks are a good example of this.

4.23 The growth of the 'out-of centre' retail sector can be seen in 'Verdict on Out of Town Retailing 2005'. This shows that over the period 1994-2004 the market share of retail spending of the out-of-town sector rose from 23.9% to 29.8%, whilst the High Street sector declined from 50.1% to 47.5%. It should be noted, however, that even with a declining market share the High Street achieved an absolute spending growth of 53.1% over the same period (1994-2004).

4.24 The growth of out-of-centre shopping was followed by out-of-centre leisure facilities. Out-of centre cinemas emerged strongly in the 1990's replacing many town centre facilities. Other forms of leisure facility, e.g. bowling, health and fitness centres, and restaurants have followed. Such facilities are also being integrated into retail parks so providing a more diverse range of attractions for visitors. This can be seen at the Valley Park, Purley Way.

4.25 More recently national planning guidance has placed increasing constraints on the growth of out-of-centre retail and leisure facilities, to which there has been some response by retailers. In the last 5 years, the multiple food retailers have introduced smaller format foodstores in town centres throughout the country such as Tesco Metro and Express and Sainsbury Local. Likewise after unsuccessful planning battles for its large format out-of-centre stores, IKEA has now introduced a new format capable of being implemented in town centres.

4.26 Despite planning policy having some effect on the development strategy of the large foodstores and retailers such as IKEA, the out-of-centre market remains strong, not least because there is a large pool of out-of-centre space, much of which has an open Class A1 retail consent. Dixons has taken advantage of this by disposing of its 'High Street' stores in favour of large and cheaper space in out-of-centre locations.

4.27 Most of the above trends are evident in Croydon, in particular the pool of retail floorspace at Purley Way Retail Parks having the benefit of an open Class A1 retail consent.

Fuel Filling Station Retailing

4.28 Fuel filling stations have traditionally contained kiosks selling confectionary and automobile products. More recently this retail offer has expanded considerably in many locations to include a wide range of convenience goods. In both rural and urban locations the lead multiple convenience traders – Tesco, Sainsbury, and Marks & Spencer – have targeted fuel filling stations as opportunities for the development of small shops to increase their market shares of convenience spending.

4.29 Within the Borough there are numerous examples of such facilities, one example of which is the Tesco filling station Thornton Heath Pond, which is recorded by some residents as the outlet for their main food shopping trips – see Section 7 and Appendix 6.

Mail Order and Internet Sales

4.30 The latest Experian forecasts indicate that 'e-tailing' currently takes 3.3% of the retail market and that this will rise to 9.7% by 2014. The growth of the e-tailing market share varies widely between different types of goods. The market share of the convenience goods market is only 2.1%, whereas that for some categories of comparison goods is very much higher.

4.31 There are definitional problems in examining this sector. Experian information indicates that internet sales have not grown as fast as was expected. However, this may be because the definition of 'Special Forms of Trading' includes sales only from companies whose sole business is internet trading, and excludes internet sales of companies that have retail outlets as well. In addition the Special Forms of Trading category includes mail order, which is declining thereby offsetting some internet sales growth within this overall sector.

4.32 There is little doubt that use of the internet will remain strongest for standardised products for which the shopper has no need to make shop window comparisons, e.g. books.

4.33 In so far as internet food trading is concerned, the planning implications have become clearer over time. Although internet food shopping has proved popular for some sectors of the population, it has become apparent that it has not lessened the need for new convenience goods floorspace provision to any significant degree. This is because generally internet orders are supplied using goods from the sales floorspace of the supermarket.

4.34 Whilst e-tailing will continue to be popular, we do not foresee it having a major impact on planning for new local shopping facilities in Croydon.

5. Town, District, and Local Centre Audits

5.1 Appendices 1 and 2 of the Report contain audits of the Borough's town and district centres, and local centres respectively. The primary focus is on the an assessment of the role and performance of the town and district centres (Appendix 1).

5.2 The assessment is based on the criteria set out in PPS6 and builds upon the Drivers Jonas Retail Needs Study 1998 and the Drivers Jonas Retail Needs Study Update 2003.

Information Sources

5.3 The principal information sources that we have used are as follows.

(i) Drivers Jonas field surveys undertaken in September 2008;

(ii) Croydon Council information on floorspace, commitments and proposals, available at September 2008;

(iii) Published databases on retailer representation and demand - EGi, Focus and IGD.

Town and District Centres

5.4 The audits in Appendix 1 cover the eight town and district centres of - Norbury, Thornton Heath, Coulsdon, Purley, Selsdon, South Norwood, Upper Norwood and New Addington.

5.5 The audits examine the performance of the existing centres against the key PPS6 indicators of vitality and viability. The indicators are described below.

Local Centres

5.6 Summary audits have been provided for the following centres in Appendix 2 – Addiscombe, South Croydon, Broad Green, Hamsey Green, Pollards Hill, Sanderstead, Shirley, Brighton Road, and Thornton Heath Pond.

5.7 We have not undertaken full audits of the local centres within the Borough because the majority of them have undergone limited change only since the Retail Update Study was undertaken in 2003. We focus on changes in floorspace and retail offer.

5.8 Broad Green is an exception. It is continuing to undergo significant development in and around the centre boundary. For this reason we have undertaken a more detailed assessment of the health of this centre.

Shopping Parades

5.9 We have not undertaken specific audits of the shopping parades, but we do make brief comments in Section 9 on the role and function of these centres within the Borough's retail hierarchy.

Purley Way Retail Parks

5.10 Our review of the Purley Way retail parks (Appendix 3) focuses only on the current offer and performance of the Parks. It describes representation by retailers and other commercial operators, and vacant floorspace.

Health Indicators

Quantity and Quality of Retailing and Other Commercial Uses

5.11 Using floorspace information provided to us from Croydon Council we have analysed the mix of uses within the centres and the quantum of floorspace they occupy. Where necessary we have included floorspace figures from IGD.

5.12 The Council's surveys identify gross floorspace, based upon measurement of the ground floor area from Goad maps. Where there are significant upper-floor uses or mezzanine levels these have been added.

5.13 We have classified the floorspace information into comparison, convenience service and vacant. Although in the Council's surveys chemists are identified as convenience, we have transferred them to comparison in order to be compatible with expenditure information. In the case of large foodstores classified as convenience in the Council's survey we have split the floorspace between comparison and convenience.

5.14 We have included as service floorspace those uses that fall within the A1 and A3 use classes. We have included as vacant floorspace only those uses that were formerly within the A1, A2 or A3 use classes, see Appendix 1 footnotes.

5.15 We provide comment on the structure of retailing within the centres, the mix of uses, the presence of national and independent operators, location of vacancies, based on Drivers Jonas site surveys in September 2008.

Demand for Representation by Retailers and Other Commercial Operators

5.16 The demand for representation in each centre has been assessed using the Focus database. This provides information on retailer demand but must be treated with some caution. Some retailers may register demand over a wide area, encompassing more than one centre. Conversely interest by some retailers may only be registered where there is a specific scheme for them to consider.

Primary Shopping Areas and Shopping Frontages

5.17 We describe the UDP defined primary shopping areas (PSAs) and shopping frontages (primary and secondary). We also makes comments in the main report on any possible changes to the shopping frontage boundaries.

Vacant Street-level Property

5.18 Evidence of vacant properties has been sourced from the floorspace data provided by Croydon Council, supplemented by Drivers Jonas site visits. This provides an understanding of the level and location of vacancies within the identified centres. It is important to note that some level of vacancies is a healthy and natural function of centres, though concentrations or long-term vacancies can be an indicator of stagnation or weakness.

Pedestrian Flows

5.19 Independent data on pedestrian flows for these smaller centres is not readily available. Therefore we provide commentary on the active areas within the centres from our own observations.

Accessibility

5.20 We have provided an analysis of the availability and frequency of public transport access to the centres from a range of destinations and the centres' accessibility for pedestrians and cyclists.

5.21 Availability of car parking within and around the centres has also been assessed including on-street parking and managed car-parks.

Centre Environmental Quality

5.22 The overall quality of centres has been assessed using indicators such as the presence of pedestrianised areas, street furniture, soft landscaping, availability of public areas and parks. Indicators also include any air pollution, noise, litter and graffiti.

Commitments and Proposals

5.23 From information supplied to us by the Council, we have identified commitments within and on the edge of centres for retail developments in excess of 200 sq m and housing development in excess of fifty units.

Development Sites

5.24 This includes commentary on any sites that are allocated within the development plan for town centre uses, or other sites that we have identified from our inspections of centres.

Regeneration Strategies

5.25 Regeneration strategies have been published, or are in hand, for some of the town and district centres. We refer to them as appropriate.

6. Shopping Catchment Expenditure Forecasts

Definition of Catchment Zones

6.1 For the purpose of examining existing shopping patterns and forecasting shopping potential within the Borough's town, district and local centres, we have devised catchment zones, which in broad terms reflect the catchments of the Borough's town and district centres.

6.2 There is considerable overlap between the catchments, particularly in the north of the Borough. Also, the catchment of some of the centres extends beyond the Borough boundaries: again this is particularly the case in the north of the Borough.

6.3 In devising the boundaries we have had particular regard to the catchments of the eight town and district centres. However, because the Zones are based on post-code sectors, their configuration is affected by the location of post-code sector boundaries. For example although post-codes CR2 6, CR2 0, and CR2 7 extend fairly close to Croydon Metropolitan Centre, they have been included within the catchments of Purley and Selsdon respectively, so as not to curtail the catchments of these town centres. We have defined six principal zones, indicated below.

Zone 1 - North
Zone 2 - Central
Zone 3 - Coulsdon
Zone 4 - Purley
Zone 5 - Selsdon
Zone 6 - New Addington

6.4 In order to provide more meaningful information on local shopping patterns we have broken down Zones 1 and 2 into four and two subzones respectively based on post-code sectors. The Zone 1 sub zones represent the principal catchments of Norbury, Upper Norwood, Thornton Heath and South Norwood. Zone 2 has been split into a western and eastern sector, again to provide more meaningful areas for which to identify local shopping patterns. These catchments zones are shown in Plan 2.

Zone Demographic Structure

6.5 The Zones are diverse in terms of their size, resident socio-economic profile, and shopping representation. Using data from MapInfo Local Area Reports (2005), we describe the key demographic characteristics of the six principal Zones individually, identifying in particular age, social economic grade, tenure, economic activity and car ownership. Our findings are summarised below and set out in full in Appendix 4.

Population structure

6.6 The MapInfo data demonstrates that most Zones have a young population, with a lower than average percentage of persons of retirement age. This difference is most marked in Zones 1 (North) and 6 (New Addington). In most of these Zones, the group of working age predominates. However, in New Addington, whilst the working population is still the largest population group, the percentage of the population aged 0-15 significantly exceeds both Borough and national averages.

Economic activity

6.7 The results indicate that the population of Croydon Borough is very economically active. In all Zones but Zone 6, the percentage of economically active individuals exceeded the national benchmark of 76%. Unemployment levels in most zones were equal to or below the national average. Unemployment levels in Selsdon and Coulsdon were particularly low. The unemployment rate in New Addington was exceptionally high compared to other zones within the Borough and the national average.

Occupation

6.8 In line with national statistics, the most dominant 'approximate social grade by occupation' is Grade C1 in all Zones. However, this does not reflect variation in other Grades across the Zones. Most notably, the statistics show that residents of New Addington are engaged in low social grade occupations, with just 12.41% of the resident population holding Grade AB positions. In Purley, Coulsdon and Selsdon, the percentage of the population in Grade AB occupations is roughly equal to those in C1 occupations.

Household and family cars

6.9 Zones in the north of the Borough exhibit much lower vehicle ownership than in the south, where public transport connections are less good. Zone 3 (Coulsdon) displays the highest levels of car ownership, with ownership levels significantly exceeding the national average.

Housing tenure

6.10 It is noticeable that in the north and central parts of the Borough (Zones 1 and 2), the percentage of households in owner occupation falls below the national average, with a high percentage of privately rented accommodation. However, in Coulsdon, Purley and Selsdon (Zones 3-5), the percentage of owner-occupied accommodation vastly exceeds the national average.

Retail Expenditure Forecasts

6.11 Quantitative forecasts of convenience and comparison expenditure within the catchment areas of the town and district centres are presented in tabular form in Appendix 5.

6.12 The convenience goods expenditure forecasts are of most relevance to town and district centres (and local centres), because local shopping facilities provide for the majority of convenience shopping needs; whereas a high proportion of comparison expenditure is, and will continue to be, attracted to the major shopping centres – Croydon Metropolitan Centre, the West End, etc. The key issue in respect of comparison goods is not the availability of expenditure, but retailer requirements/perceptions and the ability of the centres to attract the available expenditure.

6.13 The assessments use a base year of 2005, with the following forecast years - 2010, 2015, 2020 and 2025. All monetary figures in the assessments are expressed in 2005 prices.

6.14 The convenience and comparison goods analyses have both been undertaken on a 'goods' basis, utilising the most up to date population and retail data available (MapInfo Local Report 2005 base year). The definitions of convenience and comparison goods used within the assessments follow the industry recognised classifications:

Convenience Goods - Food; alcoholic drink; tobacco; newspapers and magazines; and non-durable household goods.

Comparison goods - Books; clothing and footwear; furniture, floorcoverings and household textiles; audio-visual equipment and other durable goods;

hardware and DIY supplies; chemists' goods; jewellery, watches and clocks; bicycles; recreational goods; and other miscellaneous goods.

Approach

6.15 For each Zone we have:

(i) provided population estimates for the base year of 2005 and population forecasts for the agreed years of 2010, 2015, 2020, and 2025;

(ii) provided convenience and comparison goods expenditure per head forecasts for the agreed years;

(iii) multiplied the outputs of (i) and (ii) above, to provide forecasts of available convenience and comparison goods expenditure for the agreed years.

Population Estimates and Forecasts

6.16 The existing population figures for the catchment zones and Study Area have been established using data from MapInfo, with a base year of 2005. This is the most recent data currently available from MapInfo based upon the 2001 Census and is adjusted annually with mid-year estimates.

6.17 Table 1 sets out the base year estimates and forecasts for agreed dates.

Convenience and Comparison Goods Expenditure per Capita Estimates and Forecasts

6.18 Convenience and comparison goods expenditure per head estimates for the six Zones at 2005 have been obtained from MapInfo local area reports (September 2008). These estimates and forecasts for the agreed years are set out in Tables 2a and 2b.

6.19 The 2005 expenditure per head estimates have been grown by a rate of +0.6% per annum for convenience goods and +4.8% per annum for comparison goods over the forecast period. These are Experian's recommended 'ultra long-term' growth trend for forecasting convenience and comparison goods expenditure. Clearly the average growth rates will not be achieved in the short term, because of the current downturn and particular stage of the economic cycle. However, because the forecasts cover a lengthy plan period we have retained the trend forecast throughout.

6.20 Deductions have been made for expenditure absorbed by non-store retail trade (NSRT) including internet trading according to the latest national Experian estimates in Retail Planner Briefing Note 5.1 up to 2016, with DJ estimates after that date. Experian comments in the Retail Planner Briefing Note 5.1 that internet sales may have passed through a retail outlet, and notes that this is particularly the case for convenience shopping where some retailers source internet goods from existing floorspace.

6.21 The percentage reductions for convenience expenditure increase from 2.7% in 2005, to 7.3% in 2015, and 10% in 2025. The equivalent figures for comparison expenditure are 8% in 2005, 14.4% in 2015, and 16.5% in 2025.

Available Convenience and Comparison Expenditure

6.22 Estimates of available convenience and comparison goods expenditure are set out in Tables 3a and 3b. These are derived by applying the average expenditure per head figures (Tables 2a and 2b) to the population estimates (Table 1) for each of the forecast years. Estimates for the Study Area as a whole are also provided.

6.23 The convenience expenditure estimates relate to 'main food' shopping trips. These have been assessed using a commonly accepted principle that on average 70% of convenience expenditure is accounted for by 'main food' shopping trips and 30% by 'top-up' shopping trips.

6.24 Tables 4a and 4b show the percentage and quantum of convenience and comparison expenditure growth over the forecast period.

Findings

6.25 The population of the Study Area as a whole is forecast to rise by approximately 46,800 persons from 422,300 in 2005, to 448,700 in 2015 and 469,000 in 2025.

6.26 The largest zones in terms of population size are in Central Croydon, Zones 2a and 2b, with 65,300 and 58,000 persons respectively at 2005. Zone 6 New Addington contains the smallest population, 17,300 at 2005.

6.27 Expenditure per head varies quite widely for both convenience and comparison goods, but the overall pattern is that the southern part of the Study Area is more affluent than the north.

6.28 The most affluent area is Zone 4 Purley with an expenditure per head at 2005 of £1,707 on convenience goods and £2,923 on comparison goods. The least affluent area is Zone 6 New Addington with an expenditure per head at 2005 of £1,356 on convenience goods and £2,123 on comparison goods. It is noticeable that expenditure per head on comparison goods in New Addington is only some 73% of that in Purley indicating the relative deprivation in New Addington. The differential between the Zone levels of expenditure per head are consistent with our Zone demographic findings described in Appendix 4.

6.29 As indicated earlier in this Section, for the purposes of our assessment we have applied national forecasts of retail expenditure per head growth. The differential between the Zones therefore remains the same over the forecast period. Whether this differential persists will depend in part on the Council's regeneration strategies, which can be monitored overtime.

6.30 The Study Area pool of available main food convenience goods expenditure is forecast to rise by £78m over the forecast period, from £486m in 2005 to £523m in 2015 to £564m in 2025. Comparison goods expenditure is forecast to grow by £1,918m over the same period, from £1,169m in 2005 to £1,848m in 2015 to £3,087m in 2025.

6.31 In terms of shopping needs and potential within the town and district centres, the pool of available convenience expenditure and its growth is the most relevant consideration. Within the period 2005-2015 the growth of convenience expenditure for Zone 1 as a whole is £12.23m and for Zone 2 £10.87m. Within Zone 6 New Addington it is only £0.72m.

7. Centre Market Shares and Expenditure Potential

7.1 We have indicated earlier that the viability of the town, district and local shopping centres in the Borough is determined primarily by their strength as centres for convenience goods shopping. Having regard to this, we have undertaken a quantitative assessment of the performance of the eight town and district centres, focussing on their performance in attracting main food shopping trips. We identify the current role of the centres for both convenience and comparison goods shopping and draw conclusions on the future expenditure potential to support the centres.

Approach

7.2 Our assessments are set out in tabular form for each centre at Appendix 6.

7.3 In Section 6 above, we have identified catchment areas and available expenditure for each town and district centre, which provides the context for this assessment. The key input to the assessment is information on shopping trip patterns within the area, enabling ‘market shares’ of expenditure attracted to each centre to be calculated, as well as ‘trade inflows’ from beyond centre catchment areas.

Centre Market Shares and Trade Inflows

7.4 We have obtained information from MapInfo ‘Retail Reach’ in respect of shopper destinations for ‘primary grocery’ and ‘comparison goods’ purchases respectively. This information is based on the National Survey of Local Shopping Patterns (NSLP) undertaken in 2005.

7.5 The data has been provided at post-code level, which we have aggregated to provide information for each of the centre catchment zones. For each catchment zone the percentage of ‘primary grocery’ trips to specific foodstores and ‘comparison goods’ trips to specific centres are identified.

7.6 In addition the percentage proportions of primary grocery and comparison trips drawn from outside the catchment zone are identified.

7.7 The convenience goods ‘market share’ information was found to provide a valuable input to the assessment. However, the information in respect of comparison goods was less easy to apply to the circumstances in the Borough’s town and district centres.

7.8 Because the Borough’s town and district centres are used mostly for supplementary comparison goods shopping trips rather than being the ‘main’ destination for such trips, we have found that the MapInfo Retail Reach information underestimates the actual comparison goods turnover of these centres. We have therefore assessed the comparison turnover of centres by applying ‘benchmark’ sales densities – see below.

Benchmark Turnovers

7.9 References to ‘benchmark’ turnovers for convenience goods facilities are derived from Retail Rankings and Verdict 2008 (2005 prices). DJ estimates have been provided for comparison goods ‘benchmark’ turnovers relating to the centres as a whole.

Convenience Goods Potential

7.10 For each centre we have adopted the following approach, the outputs of which are shown in Appendix 6 Tables 5a-c to 14a-e.

7.11 The first step has been to identify at the base date the 'market share' of convenience expenditure attracted to foodstores within each centre. At the same time we have identified expenditure inflows to these facilities from outside the catchment zone. We have then assessed 'benchmark' turnovers for the foodstores based on company average sales density figures. By comparing each centre's 'survey derived' turnover with the 'benchmark turnover', we have been able to identify how each centre is performing at the base date – whether 'overtrading' or 'undertrading'. In addition the survey identifies the principal expenditure outflows to facilities elsewhere in Croydon Borough.

7.12 We have gone on to assess future convenience goods expenditure potential at the forecast dates of 2010, 2015, 2020, and 2025. The principle underlying the forecasts is that the share of expenditure attracted to existing centres (as deduced from the MapInfo Retail Reach information) will remain broadly the same over the forecast period. In our view it is appropriate to adopt this approach for the purpose of plan making.

7.13 We have grown the 'survey derived' turnover of foodstores by a factor of 0.6% per annum (the same rate used for the overall convenience goods expenditure growth rate Table 2a). We also allowed for benchmark turnovers to grow by a factor of 0.3% per annum, which enables us to identify surplus expenditure growth for each centre.

7.14 We have included commitments and proposals, where appropriate, such as the Sainsbury scheme in Coulsdon and the Tesco proposals in New Addington. Any significant improvement in the retail offer within any of the centres (in convenience or comparison goods) would be likely to increase its market share of expenditure attracted to the centre. We comment on this as appropriate.

7.15 For each of the forecast years, the growing convenience goods expenditure surplus is identified, as well as any apparent expenditure surplus/deficit at the date arising from stores overtrading or undertrading at the base date.

Comparison Goods Potential

7.16 For the purposes of assessing comparison goods expenditure potential, we have first assessed the 'benchmark' turnover of the each centre by applying 'benchmark' sales densities to the comparison goods floorspace of the centres, based on our knowledge of the centres. We have noted above that the MapInfo Retail Reach information has limitations in respect of comparison goods shopping in small centres, because they are the 'main outlet' for few comparison goods trips.

7.17 As with convenience goods, we have gone on to assess future comparison goods expenditure potential at the forecast dates of 2010, 2015, 2020, and 2025. We have grown the available expenditure to centres in accordance with our forecasts (Section 6 and Appendix 5). Based on the ratio of available zone expenditure compared with turnover of the centre remaining constant over the plan period, we identify the surplus additional comparison goods expenditure that will become available to them.

7.18 It is important to note that the figures of surplus comparison goods expenditure are not a maxima. They are based on a very low market share of available expenditure being attracted to the centres. If the opportunity arises, there would normally be sound planning reasons for encouraging a higher proportion of comparison goods spending to be retained in the Borough's town and district centres.

Centre Findings

7.19 Our assessment for each town and district centre is set out below.

Zone 1a Norbury

7.20 Zone 1a is made up of post-codes SW16.3, SW16.4, SW16.5, and CR4.1, (see Plan 2). The Zone is unusual, in that although focused on the UDP defined town centre of Norbury, this centre performs a limited shopping role only.

7.21 Available main food expenditure within the zone is approximately £59m, of which some 44% is retained locally. However, this level of retention is overwhelmingly due to Sainsbury Streatham, which lies beyond the Borough boundary, attracting 33% of main food spending. The two main foodstores in Norbury attract some 6% only of main food spending.

7.22 There are heavy outflows of main food expenditure to the Purley Way retail parks, Sainsbury and Asda superstores combined account for some 33% of main food expenditure. Tesco Thornton Heath attracts some 8% of main food expenditure.

7.23 There is no evidence of significant overtrading by Norbury foodstores. This conclusion is based on visual inspection, as the number of survey responses for Norbury foodstores is limited.

7.24 We are not aware of any significant retail commitments in Norbury. The 'expenditure growth surplus' is forecast to rise by £1.24m by 2015 and £2.36m by 2025 (Table 5c). The majority of this is likely to be attracted to the Sainsbury Streatham store (or increased leakage to Purley Way retail parks), unless there were the opportunity to provide enhanced supermarket facilities in Norbury, which seems unlikely.

7.25 Our survey results suggest that Sainsbury's Streatham in particular is trading strongly. If allowance is made for the apparent overtrading of stores within the Zone, the 'potential expenditure surplus' would be significantly greater. However the assessment of benchmark turnovers is imprecise and caution should be exercised in interpreting base date 'potential expenditure surplus' as being a justification for new floorspace.

7.26 Available comparison goods expenditure within the zone at the base date is approximately £141m, and is expected to grow to £221m by 2015 and £369m by 2025.

7.27 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of Norbury as £10.1m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 7%.

7.28 On the basis of the potential comparison goods turnover of Norbury being equivalent to 7% of available zone expenditure in monetary terms, we estimate that an additional £6m comparison expenditure would be available to support the centre by 2015 and £16m by 2025.

Zone 1b Upper Norwood

7.29 Zone 1b is made up of post-codes SE19.1, SE19.2, and SE19.3, see Plan 2. Unfortunately at the time of the NLSP surveys (early 2006) the district centre's principal foodstore was vacant (following the take-over of Safeway by Morrisons) and this therefore has caused the base date shopping patterns to be skewed as compared with the norm for this centre. The store was reoccupied by Sainsbury in August 2006.

7.30 Available main food expenditure within the zone is approximately £30m, of which, because of the vacant main foodstore, only some 9% was retained locally. The two foodstores recorded as attracting main food shopping trips were Budgens and Tesco Crystal Palace.

7.31 The principal expenditure outflows to centres within Croydon were - Sainsbury Selhurst Park 22%, Purley Way retail park superstores 12%, Tesco Thornton Heath 10%, and Sainbury Streatham 6%. The flows to Sainsbury Selhurst Park in particular will have been influenced by the temporary loss of the main supermarket in Upper Norwood.

7.32 We are not aware of any significant retail commitments in Upper Norwood, but we have made judgements on how reoccupation of the town's main foodstore by Sainsbury will have changed shopping patterns. From visual inspection of the Sainsbury store it does not show signs of overtrading. We have therefore allowed for it to trade at the Sainsbury company average. On this basis we estimate that the Zone 1b market share of main food expenditure, including the Sainbury's store will have risen to some 40% in 2010.

7.33 On the basis of the potential comparison goods turnover of Upper Norwood being equivalent to 16% of available zone expenditure in monetary terms, we estimate that an additional £6m comparison expenditure would be available to support the centre by 2015 and £18m by 2025.

Zone 1c Thornton Heath

7.34 Zone 1c is made up of post-codes CR7.6, CR7.7, and CR7.8, see Plan 2. The retail focus of the zone is Thornton Heath town centre, but the zone also includes Thornton Heath Pond local centre.

7.35 Available main food expenditure within the zone is approximately £51m, of which some 63% is retained locally. The overwhelming majority of this expenditure is attracted to Tesco Thornton Heath, 56%. It also attracts a considerable amount of trade from outside the Zone - some 50% of its total trade.

7.36 The principal outflow of main food expenditure is to the Purley Way retail parks superstores, 22%. Despite being quite close to Thornton Heath town centre, Sainsbury Selhurst Park attracts only 6% of main food expenditure. This is no doubt due to its unusual location at Crystal Palace football ground, which is a not particularly accessible retail location.

7.37 Comparison of the survey results with company average sales density figures indicates that Tesco Thornton Heath is trading strongly above company average. This also accords with our visual inspection of the store.

7.38 We are not aware of any significant retail commitments in Thornton Heath. The 'expenditure growth surplus' will grow by some £3.42m by 2015 and £7.48m by 2025. However, as noted above, Tesco Thornton Heath is currently trading strongly and this suggests that in addition to future expenditure growth, there would be justification for some additional floorspace in the town centre now if there were a suitable opportunity.

7.39 Available comparison goods expenditure within the zone at the base date is approximately £122m, and is expected to grow to £192m by 2015 and £321m by 2025.

7.40 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of Thornton Heath as £11m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 9%.

7.41 On the basis of the potential comparison goods turnover of Thornton Heath being equivalent to 9% of available zone expenditure in monetary terms, we estimate that an additional £6m comparison expenditure would be available to support the centre by 2015 and £18m by 2025.

Zone 1d South Norwood

7.42 Zone 1d is made up of post-codes SE25.4, SE25.5, and SE25.6, see Plan 2. The retail focus of the zone is South Norwood district centre, but the main food store is Sainsbury Selhurst Park, approximately 1km to the north west of the district centre.

7.43 Available main food expenditure within the zone is approximately £37m, of which some 24% is retained locally. The majority of this expenditure is attracted to Sainsbury Selhurst Park, 17%. The Somerfield store in South Norwood attracts some 7% of main food trips only.

7.44 The principal outflows of main food expenditure are to the Purley Way retail park superstores 20% and Tesco Thornton Heath 17%.

7.45 The survey results suggest that Sainsbury Selhurst Park and Somerfield South Norwood may be undertrading. The former is likely to be due to its unusual location at Crystal Palace football ground, which is a not particularly accessible retail location.

7.46 We are not aware of any significant retail commitments in South Norwood. The ‘expenditure growth surplus’ is forecast to rise by £1.02m by 2015 and £2.04m by 2025 (Table 8c). The current trading performance of the Sainsbury and Somerfield stores indicates that this additional expenditure potential will be needed to support the existing stores.

7.47 Available comparison goods expenditure within the zone at the base date is approximately £89m, and is expected to grow to £141m by 2015 and £235m by 2025.

7.48 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of South Norwood as £5.6m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 6%.

7.49 On the basis of the potential comparison goods turnover of South Norwood being equivalent to 6% of available zone expenditure in monetary terms, we estimate that an additional £3.3m comparison expenditure would be available to support the centre by 2015 and £9.24m by 2025.

Zone 2a Central Croydon West

7.50 Zone 2a is made up of post-codes CR0.1, CR0.2, CR0.3, CR0.4, and SM6.8, see Plan 2. There are no town or district centres within this zone, which is dominated by Croydon Metropolitan Centre and the Purley Way retail parks.

7.51 Available main food expenditure within the zone is approximately £75m, of which some 73% is retained locally. Within the Purley Way retail parks Asda takes 25% of main food shopping trips and Sainsbury 19%.

7.52 Tesco Thornton Heath (outside the zone) takes 12% of main food expenditure.

7.53 Comparison of the survey results with company average sales density figures indicates that most stores within the zone are trading well. In particular both Asda and Sainsbury Purley Way are shown as trading strongly and drawing roughly 30% of their turnovers from beyond the zone.

7.54 Because there are no town or district centres within the zone, we make no further comment on the zone expenditure patterns.

Zone 2b Central Croydon East

7.55 Zone 2b is made up of post-codes CR0.5, CR0.6, CR0.7, and CR0.8, see Plan 2. There are no town or district centres within this zone, but Addiscombe and Shirley local centres lie within the zone.

7.56 Available main food expenditure within the zone is approximately £67m, of which some only some 17% is retained locally. Both Addiscombe and Shirley attract low proportions of main food shopping expenditure, each less than 5% market share.

7.57 There are diverse outflows of main food expenditure, including some 14% to Croydon Metropolitan Centre stores and 13% to the Purley way retail park superstores.

7.58 We are not aware of any significant retail commitments in the zone. The ‘expenditure growth surplus’ is forecast to rise by £1.6m by 2015 and £3.39m by 2025 (Table 10c). However, the survey results suggest that foodstores in Zone 2b are trading strongly, and this suggests that in addition to future expenditure growth, there would be justification for some additional floorspace to serve this area if there were suitable opportunity.

Zone 3 Coulsdon

7.59 Zone 3 is made up of post-codes CR5.1, CR5.2, CR5.3, and CR5.4, see Plan 2. The retail focus of the zone is Coulsdon town centre.

7.60 Available main food expenditure within the zone is approximately £33.5m, of which only some 10% is retained locally by the relatively small Waitrose supermarket.

7.61 There is a large expenditure outflow to the nearby Tesco Purley, which represents 40% of main food shopping trips within the Coulsdon area. The Purley Way retail park superstores account for only 7% of main food trips.

7.62 It appears that the Waitrose store is trading around company average.

7.63 There are significant foodstore commitments and proposals within the centre - Sainsbury and Aldi (see Section 8 and Appendix 1). We have made allowance for these commitments in Tables 11d and 11e. We have assumed that these stores will trade at their respective company average. On this basis we estimate that Zone 3 market share of main food expenditure, including the Sainbury and Aldi stores will have risen to some 74% at 2010.

7.64 Available comparison goods expenditure within the zone at the base date is approximately £82m, and is expected to grow to £133m by 2015 and £224m by 2025.

7.65 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of Coulsdon as £14.4m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 18%.

7.66 On the basis of the potential comparison goods turnover of Coulsdon being equivalent to 18% of available zone expenditure in monetary terms, we estimate that an additional £9m comparison expenditure would be available to support the centre by 2015 and £25m by 2025.

Zone 4 Purley

7.67 Zone 4 is made up of post-codes CR2.0, CR2.7, CR2.8, CR2.9, and CR0.9, see Plan 2. The retail focus of the zone is Purley town centre, which in turn is dominated by the large Tesco superstore, stocking a wide range of comparison as well as convenience goods.

7.68 Available main food expenditure within the zone is approximately £62m, of which some 54% is retained locally at the Tesco store. It also attracts a considerable amount of trade from outside the Zone - some 58% of its total trade.

7.69 The principal outflows of main food expenditure are to Croydon Metropolitan Centre 6%, Purley Way retail parks 7%, and Sainsbury Selsdon 6%.

7.70 Comparison of the survey results with company average sales density figures indicates that the Tesco store is trading strongly above company average. This also accords with our visual inspection of the store.

7.71 The convenience main food 'expenditure growth surplus' is forecast to rise by £.6.6m by 2015 and £12.5m by 2025 (Table 12c).

7.72 As noted in Appendix 1, there is a commitment in Purley town centre for 4,002 sq m gross floorspace of retail development. We are not aware of commitments to any particular retailers – convenience or comparison goods.

7.73 In the event that the commitment were taken up by a further large foodstore, we have assessed that this could raise the Purley market share of convenience goods expenditure attracted from Zone 4 to 85%. However, a more modest size store than we have assumed (such as a M&S Simply Food) would raise the market share by a lesser amount. It appears to us that there is adequate convenience goods expenditure capacity to support additional convenience floorspace in the centre.

7.74 There is ample comparison goods expenditure capacity in the area to support a wholly comparison goods scheme on the site. A comparison goods scheme on the site would be likely to achieve a turnover of £15m to £20m.

7.75 Even in the hypothetical situation of Purley's market share of comparison goods expenditure remaining constant, a substantial part of the scheme's turnover requirement would be generated by expenditure growth. Available comparison goods expenditure within the zone at the base date is approximately £152m, and is expected to grow to £246m by 2015 and £412m by 2025.

7.76 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of Purley as £17.8m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 12%. On the basis of the potential comparison goods turnover of Purley being equivalent to 12% of available zone expenditure in monetary terms, we estimate that an additional £11m comparison expenditure would be available to support the centre by 2015 and £30m by 2025.

7.77 The above analysis shows that approximately half the turnover requirement of a comparison goods scheme would be accounted for by expenditure growth alone by 2015. We are satisfied that some increase of Purley's market share from its current low level would more than justify a scheme of this nature.

Zone 5 Selsdon

7.78 Zone 4 is made up of post-codes CR2.6, SM6.9, CR8.1, CR8.2, CR8.3, CR8.4, and CR8.5, see Plan 2. The zone is focussed on Selsdon district centre, but also includes Sanderstead local centre and Forestdale shopping parade. Configuration of post-code sectors causes the zone to extend well to the north towards South Croydon.

7.79 Available main food expenditure within the zone is approximately £55m, of which some 41% is retained locally. The majority of this expenditure is attracted to Sainsbury Selsdon, 36%.

7.80 The principal outflow of main food expenditure is to Tesco Purley 35%, Purley Way retail park superstores 7% and Croydon Metropolitan Centre 7.5%.

7.81 Comparison of the survey results with company average sales density figures indicates that the Sainsbury store is trading well, but that the Waitrose Sanderstead store appears to be under-trading.

7.82 We are not aware of any significant retail commitments in Selsdon. The 'expenditure growth surplus' is forecast to rise by £1m by 2015 and £2.7m by 2025 (Table 13c).

7.83 Available comparison goods expenditure within the zone at the base date is approximately £134m, and is expected to grow to £208m by 2015 and £346m by 2025.

7.84 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of Selsdon as £6.4m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 5%.

7.85 On the basis of the potential comparison goods turnover of Selsdon being equivalent to 5% of available zone expenditure in monetary terms, we estimate that an additional £3.5m comparison expenditure would be available to support the centre by 2015 and £10.2m by 2025.

Zone 6 New Addington

7.86 Zone 6 consists of post-code CR9.0 only, which is the New Addington estate, see Plan 2.

7.87 Available main food expenditure within the zone is approximately £16.4m, of which some 17% only is retained locally. The majority of the market share is recorded as being attracted by Iceland.

7.88 The principal outflows of main food expenditure are to Purley Way retail parks 23%, Tesco Purley 19%, and Sainsbury Selsdon 11%. Croydon Metropolitan Centre takes 7%.

7.89 There are significant foodstore commitments and proposals within the zone – Lidl (out-of-centre) and Tesco (see Section 8 and Appendix 1). We have made allowance for these commitments in Tables 14d and 14e. We have assumed a gross floorspace of 4,000 sq m for the proposed Tesco store, and we have assumed that both the Tesco and Lidl stores will trade at their respective company averages.

7.90 Having regard to the location and form of New Addington and its shopping centre, we judge that it would be unrealistic to assume that New Addington (Zone 6) would retain more than 80% of residents' main food convenience spending. There will always be some residents' expenditure exported to Croydon Metropolitan Centre and the Purley Way retail parks, sometimes as part of combined shopping trips.

7.91 We have then compared the turnover requirement of the existing stores and commitments with the available expenditure (80%) from Zone 6. This indicates that at 2010 in order to support the level of convenience floorspace some 28% of the stores turnovers will have to be attracted from outside the Zone.

7.92 Available comparison goods expenditure within the zone at the base date is approximately £37m, and is expected to grow to £56m by 2015 and £93m by 2025.

7.93 Based on an estimated benchmark sales density, we have assessed the comparison goods turnover of New Addington as £5.93m at the base date, which as a ratio of the available comparison goods expenditure within the zone is 16%.

7.94 On the basis of the potential comparison goods turnover of New Addington being equivalent to 16% of available zone expenditure in monetary terms, we estimate that an additional £3.2m comparison expenditure would be available to support the centre by 2015 and £9.2m by 2025.

8. Town and District Centre Issues and Opportunities

8.1 In this Section we describe the key issues and opportunities arising in the Borough's town and district centres drawing on material from Section 7 in particular on matters relating to expenditure potential and shopping needs within the centres.

Norbury

Role and Function

8.2 Norbury is a linear Edwardian centre running along the busy London Road (A23) in the northern part of the Borough. The whole of the Primary Shopping Area (PSA) is within a designated conservation area.

8.3 The centre predominantly serves walk-in trade from the surrounding residential areas. The majority of the main food trips are drawn to the Sainsbury's store in Streatham to the north of the centre. The principal food retailers within the centre are a small Somerfield store, Iceland and Superdrug. Although the principal supermarket in the town centre, the Somerfield store has no dedicated parking areas and at the time of our visits was quiet. The comparison goods offer includes Superdrug, but otherwise is limited in terms of quality. The centre is dominated by service uses, particularly restaurant and fast food take-aways.

8.4 There is evidence of some persistent vacancies in the northern part of the centre. Off-street car parking is limited and on-street parking is restricted, particularly on the main London Road, which is a designated 'Red Route'. The quality of the pedestrian environment in the centre is poor, this is principally because of the main road traffic.

8.5 There is limited demand by retailers for representation in Norbury, and we are not aware of any significant retail commitments in the centre. The major change afoot is a residential development currently under construction just to the north of the centre.

Primary Shopping Area and Shopping Frontages

8.6 The PSA extends as far as the railway line to the north, and Northborough Road to the south.

8.7 All designated frontages, both primary and secondary, are along London Road (A23). The primary frontage is flanked to the north and south of the centre by secondary frontage which extends as far south as Northborough Road and to the railway to the north.

8.8 These boundaries appear to us to reflect the current circumstances, as well as reflecting likely planning requirements in the early parts of the plan-period. The units to the south preclude any frontage extension and the railway bridge to the north acts as a natural barrier to any extension.

8.9 Consideration could be given to protecting the frontages immediately outside of the railway station as these could provide a useful service to the commuting public where footfall is at its greatest.

Issues and Opportunities

8.10 Norbury attracts a very limited percentage of main food shopping trips from its catchment, approximately 7% only. The bulk of main food shopping trips are made to Sainsbury Streatham, some 33%, which is a short distance away to the north. A similar proportion (33%) of main food shopping trips is attracted to the superstores in the Purley Way retail parks.

8.11 The centre lacks a range of shops. Most retailers are small independent service outlets such as restaurants, cafes, hairdressers and beauty salons. The centre lacks presence from national multiples.

8.12 It does not appear that there are development sites that would accommodate enhanced supermarket representation, so enabling Norbury to perform an effective 'town centre' role.

8.13 Having regard to the current limited shopping function of Norbury that we believe is unlikely to change materially in the future, we question whether it warrants a 'town centre' designation in the LDF.

Upper Norwood

Role and Function

8.14 Upper Norwood is a district centre serving the far north east of Borough, and part of the neighbouring Boroughs of Lambeth and Bromley. Its catchment extends some way beyond the boundary of LB Croydon. The information to which our assessment refers relates to part of the centre within LB Croydon.

8.15 The centre has a broad retail offer including Sainsbury's (3,497 sq m gross), Iceland and Woolworths. The Sainsbury's store opened in August 2006, having formerly been occupied by Safeway. Budgens is located within that part of the centre outside Croydon Borough, but performed an important role for the centre at the time of the shopper surveys (Section 7), when the unit was vacant. In addition to its retail offer, the centre has a strong service sector, including the popular multiples Pizza Express and Costa Coffee.

8.16 There is generally good pedestrian footfall within the centre and much of the centre is of a high environmental quality, in particular along Westow Street and Westow Hill. There is some evidence of vacancies along Church Road.

8.17 There is limited demand by retailers for representation in Upper Norwood, and we are not aware of any significant retail commitments in the centre. There is a potential development site opposite the Sainsbury store on Westow Street.

Primary Shopping Area and Shopping Frontage

8.18 The PSA extends along the full length of Westow Street and along Westow Hill from the junction with Westow Street to the junction with Beardell Street. This area does not include any of the northern side of Westow Hill as this is located outside of the Borough.

8.19 The UDP designated frontages are largely focused along Westow Street and Westow Hill, with the majority of primary frontage along Westow Street and the western end of Westow Hill.

8.20 These boundaries appear to us to reflect the current circumstances, as well as reflecting likely planning requirements in the early parts of the plan-period. However, there may be some scope for extending the primary shopping frontage to include all of Westow Street to the junction with Church Road.

Issues and Opportunities

8.21 Upper Norwood is an attractive centre and appears popular. With the introduction of the new Sainsbury supermarket we believe that the centre has re-established itself as a popular destination for main food shopping trips by local residents. We have estimated that some 40% of such trips may be made to the centre. Furthermore unlike many other large foodstores in the Borough, Sainsbury Upper Norwood does not appear to be trading strongly.

8.22 Upper Norwood also includes a number of high end independent and multiple retailers and service uses. It is reasonably accessible, by bus and car to a relatively affluent catchment. There appears to be sufficient on and off-street parking to support the centre.

8.23 Development opportunities in the centre are likely to be of a scale that require integration with the fabric of the centre, rather than extensions to it. There does not appear to be a need for any major changes to the centre.

8.24 Although Upper Norwood has some of the characteristics of a town centre, its current classification as a district centre may be considered more appropriate overall.

Thornton Heath

Role and Function

8.25 Thornton Heath acts as a town centre for a large high density Victorian/ Edwardian residential area to the north of Croydon Metropolitan Centre, served by a rail station and a wide range of bus services.

8.26 Because of its inner area location and characteristics the centre has a congested and busy feel.

8.27 Key multiple retailers include a large Tesco (6,170 sq m gross) and Iceland. There is also a strong mix of ethnic food and other shops reflecting the needs of the local population.

8.28 Thornton Heath has a low vacancy rate in comparison with other centres, which suggests that there is still demand for retail units.

8.29 The new Leisure Centre in London Road represents recent investment in the centre, which has enhanced its viability.

Primary Shopping Area and Shopping Frontages

8.30 The UDP defined PSA extends from Melfort Road in the west to Gillett Road in the east.

8.31 The primary and secondary shopping frontages encompass the length of the High Street extending a short distance to the east where the road becomes Brigstock Road. On the corner of Parchmore Road and the High Street a significant and recent Sport England funded Leisure Centre which creates a break in the retail frontage.

8.32 These boundaries appear to us to reflect the current circumstances, as well as reflecting likely planning requirements in the early parts of the plan period.

Issues and Opportunities

8.33 Thornton Heath is a busy centre, and clearly performs an important function for a large area in the north of the Borough. The centre is dominated by Tesco and a range of independent and ethnic shops.

8.34 The centre attracts just under 60% of main food shopping trips from its catchment, with Tesco in the heart of the town centre, attracting approximately 50% of its trade from the catchment and 50% from beyond. Use of Sainsbury Selhurst Park is quite limited (6%), but there are significant main food outflows to the Purley Way retail parks, probably representing the needs of price conscious shoppers and combined trips for the purchase of non-food goods.

8.35 There is expenditure potential for new convenience goods floorspace in the Thornton Heath area, as is indicated by the strong performance of the Tesco store. However, opportunities to provide new floorspace within the centre are limited. There is a potential site on the corner of Woodville Road and High Street (currently in use as a garden centre). There are also possible long term development opportunities in the vicinity of the station at Brigstock Road.

8.36 Thornton Heath is appropriately defined as a town centre.

South Norwood

Role and Function

8.37 South Norwood is a district centre within the north east of the Borough, catering predominantly for walk-in and bus generated trade. Much of the centre is within a conservation area and of reasonable environmental quality.

8.38 Retailer representation is limited, the principal foodstore being Somerfield (1,916 sq m gross) on Station Road. Independent shops and service trades are heavily represented in the centre, the latter representing some 50% of units.

8.39 The vacancy rate within the centre is relatively high, with a significant number of vacant units at the eastern end of High Street.

Primary Shopping Area and Shopping Frontages

8.40 The PSA extends from the junction of South Norwood Hill and High Street in the east and to the end of the primary shopping frontage in the west, a short distance beyond Station Road.

8.41 The existing primary shopping frontage extends from Grosvenor Road along to the south west, including Somerfield and a range of other smaller retail outlets. The main secondary frontages identified in the UDP are to the east of the centre.

8.42 These boundaries appear to us to reflect the current circumstances, as well as reflecting likely planning requirements in the early parts of the plan period.

Issues and Opportunities

8.43 South Norwood attracts less than 10% of main food shopping expenditure from its catchment (the three nearest post code sectors). The major draw is to the nearby Sainsbury Selhurst Park, which attracts some 17% of main food shopping expenditure, and Tesco Thornton Heath which also attracts 17% of expenditure. 20% of main food expenditure is drawn to the Purley Way retail park superstores.

8.44 The retail offer in South Norwood is limited, the principal outlet being the Somerfield supermarket. We are not aware of retailer demand for representation within the centre, and we have identified no potential retail development sites.

8.45 South Norwood is currently designated as a district centre, which appears to us to be appropriate.

Coulsdon

Role and Function

8.46 Coulsdon town centre serves a relatively affluent catchment, catering predominantly for walk-in and car-borne trade. The key retailers in the centre are Waitrose (912 sq m gross), Boots and Woolworth. By Waitrose standards, the supermarket is small as is its car park which provides a limited number of spaces only.

8.47 The centre is well located in relation to its catchment from which there are a number of bus services. Other than parts of Brighton Road there is a reasonable footfall along the main frontages.

8.48 A 'Coulsdon Area Regeneration Strategy' (SPG20) was published by the Council in October 2004. The opportunity for regeneration arose in part from construction of the town centre Relief Road. The Relief Road opened in 2007 and this has significantly improved the shopper environment of the centre.

8.49 The strategy identified a number of sites with potential for improvement or redevelopment. These included:

- The Red Lion PH site – on which there have subsequently been proposals for a discount foodstore;
- Other properties on the west side of Brighton Road;
- The Pinewood site – now a Sainsbury commitment; and
- The Lion Green Road car park

8.50 Implementation of a discount foodstore at the Red Lion PH would benefit Brighton Road and the viability of the centre as a whole. We are aware that recent planning applications have been refused on the grounds of design. However, because a retail use in this location should be acceptable in principle, we have assumed the a consent will be achieved in due course.

8.51 Sainsbury was granted consent for a foodstore of 5,446 sq m gross area in 2007. The two additional supermarkets in the centre will considerably increase the retail offer and attractiveness of the centre.

8.52 The shopping frontages in Chipstead Valley Road are an important part of the centre and provide an opportunity to improvement and upgrade the centre. The Lion Green Road car park is an important development opportunity within the ownership of the Council being considered for a mixed use development, including retail community facilities and car parking.

8.53 Major residential development at the nearby Cane Hill Hospital site will provide additional support for the town centre shops.

Primary Shopping Area and Shopping Frontages

8.54 The UDP defined PSA extends to the railway line in the north, to the junction between Lion Green Road and Brighton Road to the south, and along Chipstead Valley Road from Brighton Road to the junction with Woodcote Grove Road. We believe that the PSA broadly reflects the current circumstances, as well as likely planning requirements in the early parts of the plan period.

8.55 The primary frontage extends along Chipstead Valley Road and the northern edge of Brighton Road to the north east of the centre. The secondary frontage includes the northern edge of Brighton Road. With the Sainsbury and Aldi stores implemented, the eastern side of Brighton Road will be strengthened and it may be appropriate to reconsider the shopping frontage designations in this area.

Issues and Opportunities

8.56 Because of its limited size, Waitrose attracts a small 10% market share only of main food convenience shopping trips. There is a large expenditure outflow to nearby Tesco Purley, which draws 41% of main food shopping trips from within the Coulsdon area. Significant expenditure outflow will be clawed back by implementation of the Sainsbury's store and Aldi discount stores within the centre. The market share of main food expenditure retained within the catchment zone is likely to be in excess of 70% with the new foodstores in place.

8.57 The introduction of two new food supermarkets, in addition to the town centre Relief Road will upgrade the shopping offer and environment significantly.

8.58 Following the opening of the Inner Relief Road the amount of traffic travelling through Coulsdon has significantly reduced. This traffic acted as a barrier to pedestrians wishing to cross the road which resulted in the centre developing on one side of Brighton Road only. A view needs to be taken on how Coulsdon is to develop now that traffic flow is reduced. With an improved shopper environment due to less traffic intrusion, there may be the opportunity to upgrade shopping frontages in the town centre.

8.59 The opening of a new Sainsbury's and discount store will clawback leakage from Purley town centre in particular, and there will be no need for further additional large foodstore floorspace in Coulsdon town centre in the first part of the plan period.

8.60 Improvement of the comparison goods retail offer to serve the relatively affluent catchment area would be beneficial, but will depend on market interest from retailers.

8.61 Redevelopment of the Lion Green Road car park site for mixed uses will provide an additional anchor for the southern part of the town centre. In particular it should introduce greater footfall in Chipstead Valley Road. The retention of car parking on the site will assist this supporting role. Any public realm improvements and a quality form of development on the Lion Green Road car park site will assist in improving the image and perception of the town centre for prospective investors.

8.62 We believe that Coulsdon warrants its designation as a town centre.

Purley

Role and Function

8.63 Purley town centre occupies a strategically accessible location in the southern part of the Borough. The centre is dominated by the large Tesco store (9,540 sq m) offering a wide range of comparison as well as convenience goods and occupying an edge-of-centre location adjacent to the A23. Other retailers in the centre include Laura Ashley.

8.64 The Tesco store is well placed to draw car-borne shoppers from a wide area across the southern part of the Borough. It is also well served by local bus services and a rail station.

8.65 A striking feature of the centre is the severance of the centre from the Tesco store by the primary road network serving the area. Despite underpasses, the link from the Tesco store to the town centre does not encourage movement of shoppers into the town centre.

8.66 Within the town centre, Brighton Road has the highest shopper footfall and the strongest shopping frontages. Footfall is much lower on High Street.

8.67 A regeneration strategy is underway, prompted by the need to improve the traffic conflict at the Brighton Road/Godstone Road junction. This in turn provides the opportunity to provide more effective pedestrian linkages between the Tesco store and the remainder of the town centre. This would benefit the town centre as a whole, particularly if the area between the Tesco store and the town centre could become an open space for the centre into which visitors to the centre would be drawn.

8.68 There are opportunities for retail, residential and mixed-use development in Purley Town Centre. The major opportunity is at the Purley District War Memorial Hospital and the corner site on Banstead Road/Russell Road at the northern end of the centre. Current proposals include 4,002 sq m retail floorspace, as part of mixed use development. An anchor retail development at the northern end of the centre would be very beneficial and lessen the town centre's reliance on Tesco as an anchor.

8.69 We have identified some demand from retailers for representation in Purley. This demand could be stimulated significantly by a quality well located development scheme coming being available in the market. However, one of the market difficulties in Croydon is that those comparison goods retailers already present in the Metropolitan Centre and the Purley Way retail parks may not be interested in a third outlet in the area.

Primary Shopping Area and Shopping Frontages

8.70 In the eastern part of the centre, the PSA runs from Russell Hill Place in the north to Whytecliffe Road in the south and is broadly encompassed by the two streets. It also extends north along the A23 to include frontages up to the junction with Foxley Lane.

8.71 The UDP primary and secondary shopping frontages are focused around High Street and Brighton Road, with the majority of primary designated frontages located close to the junction between High Street and Brighton Road. There is also some secondary shopping frontage along A23 Purley Way at the northern end of the town centre.

8.72 It may be appropriate to reconsider the boundaries of the PSA and shopping frontages having regard to the final form of new retail development associated with both new links from the Tesco store in the south and redevelopment of the Hospital site in the north.

Issues and Opportunities

8.73 Tesco is the dominant store and is trading strongly. It accounts for some 54% of main food grocery trips made by residents within the Purley catchment zone. It also attracts a considerable amount of trade from outside the Zone - some 58% of it total trade.

8.74 The town centre suffers from high levels of traffic from the A22 and the A23 which severs the Tesco store from the remainder of the centre. Regeneration schemes associated with transport improvements should provide the opportunity to improve this situation considerably.

8.75 There is expenditure potential to provide new convenience and comparison goods floorspace in the town centre, and there are development opportunities that may provide the opportunity to enhance the retail offer of the town centre and draw shoppers more widely through the centre.

8.76 The strength of comparison goods retailer representation in the Purley Way retail parks in addition to Croydon Metropolitan Centre, may make it more difficult to attract some retailers to what would be a third location in the Borough. Operator demand would need to be tested.

8.77 Purley warrants its continued designation as a town centre.

Selsdon

Role and Function

8.78 Selsdon is a district centre serving a relatively affluent catchment of low density housing. Because of the low density character of the area, use of the car for shopping trips is more prevalent than in other parts of the Borough.

8.79 The shopping frontages of the centre are on both sides of Addington Road, but with the strongest frontage and greatest footfall being on the south side with an Aldi store at the eastern end. There is a preponderance of independent retailers within the centre. One of the few multiples in the centre is Woolworths.

8.80 The major recent addition to the centre is a large Sainsbury store (3,585 sq m gross) opened in 2004 in an edge-of-centre location to the west on the opposite side of Farleigh Road. The Sainsbury store will have increased the draw of the centre from its catchment area and will have drawn some shoppers from further afield. One of the consequences of the introduction of Sainsbury appears to have been loss of the Somerfield store and its replacement by the Aldi store.

8.81 A former garage site close to Aldi at the eastern end of Addington Road is available for development and has the benefit of a planning permission including 1,635sqm of retail space plus 35 car parking spaces.

Primary Shopping Area and Shopping Frontages

8.82 Selsdon shopping centre is linear in form. The UDP defined PSA extends from and includes the Sainsbury's superstore in the west to the new Aldi store in the east.

8.83 The designated primary and secondary frontages are on the south side of Addington Road, with a small area of secondary frontage on the north side of Addington Road at the western end of the centre. Although the main shopping street is on both the north and south of Addington Road, the designated frontage does not extend to the whole length of the road on both sides.

8.84 Consideration could be given to a possible extension of the secondary frontage eastwards on the northern side of Addington Road.

Issues / Opportunities

8.85 Sainsbury is the dominant store within Selsdon and attracts some 37% of residents main grocery trips from within its catchment zone. There is a strong leakage of main food shopping trips to Tesco Purley, particularly from residents in the western part of the catchment area.

8.86 Selsdon is a relatively compact centre conveniently located in relation to its relatively affluent catchment area. It contains a good mix of uses, and has benefitted from the introduction of the large Sainsbury's store on the edge of the centre.

8.87 The centre has no particular shopping needs. In particular, introduction of the Sainsbury's and Aldi stores has strengthened the centre and there is no need to plan for additional convenience provision in the first part of plan period.

8.88 The development site in the eastern part of the centre will hopefully provide the opportunity to further diversify the offer of the centre.

8.89 We have noted in Section 2 that Selsdon is not included in the London Plan as a district centre, but is so defined in the UDP. We believe that Selsdon does qualify as a district centre, particularly since the opening of the Sainsbury store.

New Addington

Role and Function

8.90 New Addington is a planned district centre serving a substantial post-war housing estate. The centre consists of a lengthy linear parade of unit shops of a standard size, which does not meet the current requirements of many retailers.

8.91 The principal convenience retailers are a small Co-Operative foodstore, Woolworths and Iceland. Most of the other traders are 'value' independent shops and services. The centre vacancy rate is low, but many units are occupied by 'low value' uses.

8.92 The arrival of Tramlink has significantly improved accessibility to New Addington.

8.93 New Addington is a regeneration area – see Section 2. The centre is subject of regeneration proposals, which involve the upgrading of Central Parade as a shopping and community centre for New Addington. The proposals include provision of a large Tesco foodstore on the western side of Central Parade. The store is proposed to be part of a comprehensive development including community facilities on land owned by the Council. We understand that a resolution to grant planning permission for a scheme has been granted subject to achievement of a satisfactory Section 106 agreement.

8.94 In addition a planning appeal was upheld in June 2008 for a Lidl store of 1,635 sq m retail floorspace gross (plus residential uses above) at the Cunningham Public House at 1 Parkway, some 0.5 kms from Central Parade.

Primary Shopping Area and Shopping Frontages

8.95 One of the characteristics of New Addington is its linear nature and a long shopping frontage. The PSA identified in the UDP currently extends from Chertsey Crescent in the south west to the Central Parade row of shops in the north east. In the north west of the centre, the PSA extends to the junction between Parkway and Central Parade, and in the south east the junction between Central Parade and Arnhem Drive.

8.96 The designated frontages in the centre are along the north east side of central parade. Almost all of the centre is allocated as primary frontage, with the exception of a small area of secondary frontage towards the southern end of the centre.

8.97 The centre has struggled to maintain its vitality and viability. We consider the current level of designated retail frontage is not required. There will be an opportunity (once Tesco is developed) to reduce the PSA and the designated frontage, and to accept and encourage some retail units to change from their current use to service/small business/office use.

Issues / Opportunities

8.98 New Addington centre retains a low (17%) market share only of available convenience expenditure. The two biggest outflows of convenience main food expenditure to the Purley Way retail parks (23%) and Tesco Purley (19%) indicate that New Addington residents are 'price conscious' and travel some distance to meet their needs. The effect of a large new Tesco foodstore will be to claw back much of this trade loss.

8.99 The centre is centrally located and has good accessibility to its catchment area by bus and tram.

8.100 The existing centre has an excessively long retail frontage and there are a number of small units that are not well suited to current retailer requirements. The introduction of non-retail uses and managed change within the fringes of the existing shopping frontages may be desirable.

8.101 The new Tesco store is of a size that is more than adequate to serve the New Addington catchment alone. We have shown in Section 7 that the combined effect of the new Tesco and Lidl stores is likely to require almost 30% of the New Addington centre convenience goods turnover to be drawn from outside the area.

8.102 The regeneration status of New Addington carries weight, and may justify new retail facilities that serve more than New Addington alone, provided that there is no serious impact on existing facilities elsewhere (or in case of comparison goods serious impact within the centre). We cannot envisage any of the major foodstores elsewhere e.g. Purley and Selsdon experiencing serious impact. The greatest competitive impact could be experienced by Somerfield at the Forestdale shopping parade. Consideration also needs to be given to the range of comparison shopping facilities in a proposed new Tesco store and their relationship and complementarity with the existing facilities in the centre e.g. pharmacy and post office.

8.103 We have noted in Section 2 that New Addington is not included in the London Plan as a district centre, but is so defined in the UDP. Introduction of the new Tesco store with upgraded community uses, will strengthen the centre considerably. We believe that New Addington should be classified as a district Centre.

9. Croydon Retail Needs and Potential

Borough Needs and Opportunities

9.1 The primary function of Croydon's shopping centres, other than Croydon Metropolitan Centre, is as centres for convenience shopping trips. The principal outlets for comparison shopping are Croydon Metropolitan Centre and the Purley Way retail parks. Future patterns of convenience goods spending are therefore of more relevance to the town and district centres than comparison goods.

9.2 Comparison goods expenditure is forecast to continue to grow significantly, notwithstanding any short term downturns caused by economic cycles. The Borough's town and district centres attract a very low proportion of this potentially available comparison goods expenditure. The issue affecting the centres' role as outlets for comparison shopping is not therefore the size of the pool of available expenditure, but the ability of the centres to attract investment by comparison goods retailers. The general trend has been for comparison retailers to locate in the larger centres, such as Croydon Metropolitan Centre.

9.3 We have assumed a high proportion of comparison expenditure will continue to be attracted to the major shopping centres – Croydon Metropolitan Centre, the West End, etc. We do, however, comment where we believe there may be some scope to enhance the comparison goods offer of a centre.

9.4 As noted above, convenience goods expenditure forecasts are of most relevance to the future role and performance of the Borough's town and district centres. We have found that some of the Borough's large foodstores are performing strongly indicating possible potential for new floorspace. This includes the Tesco stores at Purley and Thornton Heath, and the Asda and Sainsbury stores at Purley Way retail parks.

9.5 It is noticeable that Purley Way retail parks attract turnover from a wide area, including the eastern parts of the Borough e.g. New Addington. Shoppers are no doubt attracted by the range of goods on offer (including some comparison goods) and price. Sustainability considerations indicate that new in-centre foodstores that would arrest at least some of this expenditure outflow should be welcomed in principle.

9.6 One of the issues that is evident within the Borough is the limited availability of sites to provide new retail facilities. This is particularly the case in the northern densely populated areas of the Borough.

9.7 One of the few areas in the northern part of the Borough where retailers have been able to find sites is Broad Green. This is a UDP defined local centre, but increasingly it appears to be performing a wider role, probably because of its location close to the Metropolitan Centre and the availability of development sites.

9.8 Conversely sites have been easier to find within and on the edge of centres in the southern part of the Borough, e.g. Coulsdon, Selsdon, and Sanderstead (the latter being a local centre only). Considerable new foodstore provision has been made, or is proposed, in the southern part of the Borough, and there is some evidence that available capacity may have been accounted for at least for first part of the plan-period. For example it appears that the Waitrose Sanderstead store may be trading below average.

9.9 Whilst some further foodstore development may be justified in some parts of the southern part of the Borough, we believe that this should be focused within centres where there is an identified need in expenditure and/or regeneration terms.

9.10 Within the central part of the Borough there are no town or district centres, and the Purley Way retail parks, Croydon Metropolitan Centre, and foodstores outside the Borough draw much convenience goods expenditure from this area. We have previously recommended that there is expenditure potential for a large foodstore within or on the edge of the Metropolitan Centre to meet the needs of this area. This remains our advice.

Centre Issues and Opportunities

9.11 Our detailed advice on this is set out in Section 8. We summarise the position here.

Town and District Centres

9.12 Within the Borough there are centres that appear to be performing reasonably and where there is limited scope for expansion in physical terms, irrespective of any expenditure growth potential. Upper Norwood falls into this category. South Norwood is performing less strongly, but there are no significant expansion opportunities.

9.13 In other centres there are proposals afoot that will considerably strengthen the centres. These include Coulsdon and New Addington.

9.14 Thornton Heath clearly plays an important role for residents of the north of the Borough, which is reflected by the large Tesco store that is trading strongly, and the range of ethnic shops serving nearby residential areas.

9.15 Purley, because of its strategic location within the southern part of the Borough, provides an opportunity for upgrading/improvement for comparison as well as convenience goods shopping. However, the feasibility of this will depend upon the market/investor attitudes.

9.16 Because of New Addington's particular needs and status as a regeneration area, we believe that upgrading of the shopping centre is important and that a foodstore facility serving a catchment wider than New Addington alone may be justifiable.

9.17 Norbury is clearly not performing the full role of a town centre.

Local Centres

9.18 There are a large number of local centres particularly in the north of the Borough. They centres are diverse, particularly as between the northern and southern parts of the Borough. Some of the centres in the north, set within Victorian/Edwardian housing areas, are quite substantial, containing a diverse range of independent outlets (including ethnic convenience and comparison goods shops) as well as grocery outlets and the traditional range of services (take-aways, etc.) found in such centres. Clearly these centres perform an important function for nearby residential areas.

9.19 Broad Green is one of the larger such centres, which with the introduction of supermarket multiples and discount stores (has some of the characteristics of a district centre. Within and beyond the centre boundary Tesco Express, Somerfield and Lidl are all represented. We provide a description of Broad Green in Appendix 3.

9.20 Within the central and southern parts of the Borough the local centres are of a more traditional nature containing grocery outlets and a range of convenience and service facilities. One of the largest of these is Addiscombe, the details of which are also provided in Appendix 3. The centre contains the Co-Op, Alldays and Woolworths, as well as a diverse range of shopping, service and community facilities. The range of facilities within Addiscombe (as well as its size) give it some of the characteristics of a district centre.

Shopping Parades

9.21 Similar to the local centres, shopping parades within the Borough are diverse, varying in nature between the Victorian/Edwardian housing areas in the north of the Borough to the more 'suburban' housing areas in the south.

9.22 Shopping parades in the north are mostly historic in the form of terraces of unit shops, some of which have been lost to retail use. One of the largest parades in the north is to the north east of the Metropolitan Centre at St James Road, where there are quite extensive main road commercial frontages containing a wide range of shopping and other uses, including a Co-Op store and Tesco Express.

9.23 Shopping parades in the south have usually been planned as service centres for the surrounding housing areas. One of the larger parades is at Forestdale, Addington. The centre contains a Somerfield store, CTN, pharmacy, florist, as well as take-away facilities, hairdresser and estate agent. This centre is clearly an effective facility for the nearby residential areas, and has many of the characteristics of a local centre.

Purley Way Retail Parks

9.24 The Purley Way retail parks are a major shopping destination within the Borough, and clearly attract a large amount of convenience and comparison goods expenditure from residents of Croydon and from further afield. In Appendix 3, we describe the offer within the retail parks, which include a large number of 'High Street' as well as bulky goods retailers. We are aware that much of the development within the parks has the benefit of open Class A1 retail use.

9.25 In Section 8 we have expressed concern that the presence of 'High Street' traders in the retail parks could have a deterrent effect upon retailers who might otherwise have invested in a centre such as Purley town centre.

9.26 Because of their 'out-of-centre' status, major new retail development is unlikely to be encouraged within the Retail Parks as a matter of planning policy. However, the Council may need to respond to further applications for new retail development and changes within the Parks.

Retail Hierarchy

9.27 We have referred in Section 2 to the retail hierarchy set out in the London Plan and Adopted UDP. Based on our surveys of the centres we believe an appropriate hierarchy of town and district centres is as set out below. We have had particular regard to the definitions of centres set out in Annex A of PPS6, to which we have referred in Section 2.

9.28 In our opinion Coulsdon, Purley, and Thornton Heath warrant being classified as town centres, having regard to their size, the range of retail and service facilities on offer, and the role they play within the nearby communities. We have downgraded Norbury from the town centre category, because of its more limited role as a shopping and service centre for the community. Furthermore there is no evidence to suggest the Norbury is likely to enhance its offer in the foreseeable future.

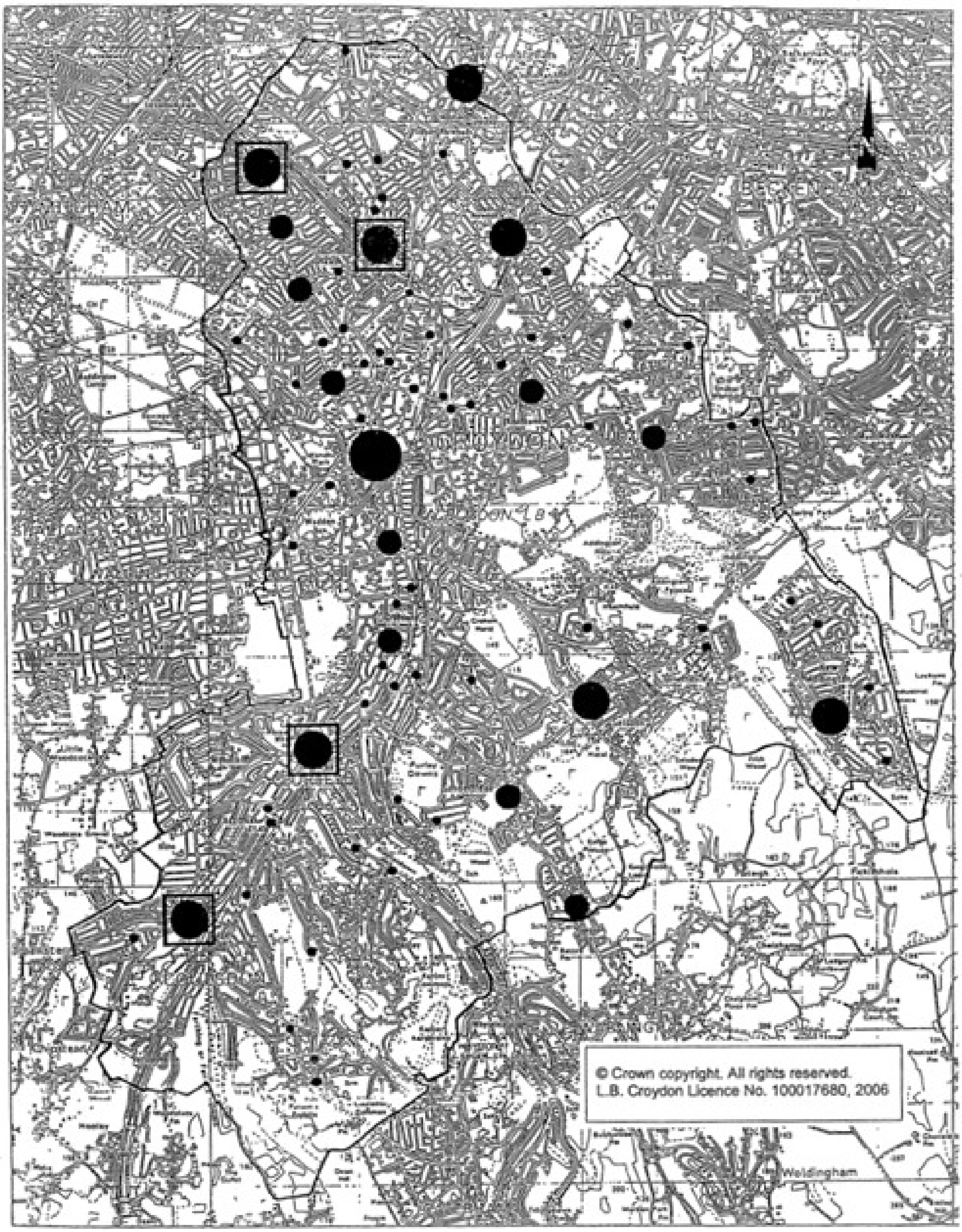
9.29 We have classified **New Addington, Norbury, Selsdon, South Norwood, and Upper Norwood** as district centres. Both New Addington and Selsdon do not feature as district centres in the London Plan. However, the convenience shopping role of Selsdon has recently been enhanced by the large new Sainsbury store, and New Addington's convenience shopping role will be much enhanced by the introduction of the new Tesco store and associated upgraded community facilities.

9.30 We have not included Addiscombe or Broad Green as district centres. However, we believe that they are borderline cases and that the Council may wish to give further consideration to this matter.

Centre Classification	Name of Centre
Town Centres	**Coulsdon** **Purley** **Thornton Heath**
District Centres	**New Addington** **Norbury** **Selsdon** **South Norwood** **Upper Norwood**

Plan 1 – Location of Town, District and Local Centres

Plan 2 – Postcode Sectors and Zones



Plan 1 – Location of Town, District and Local Centres

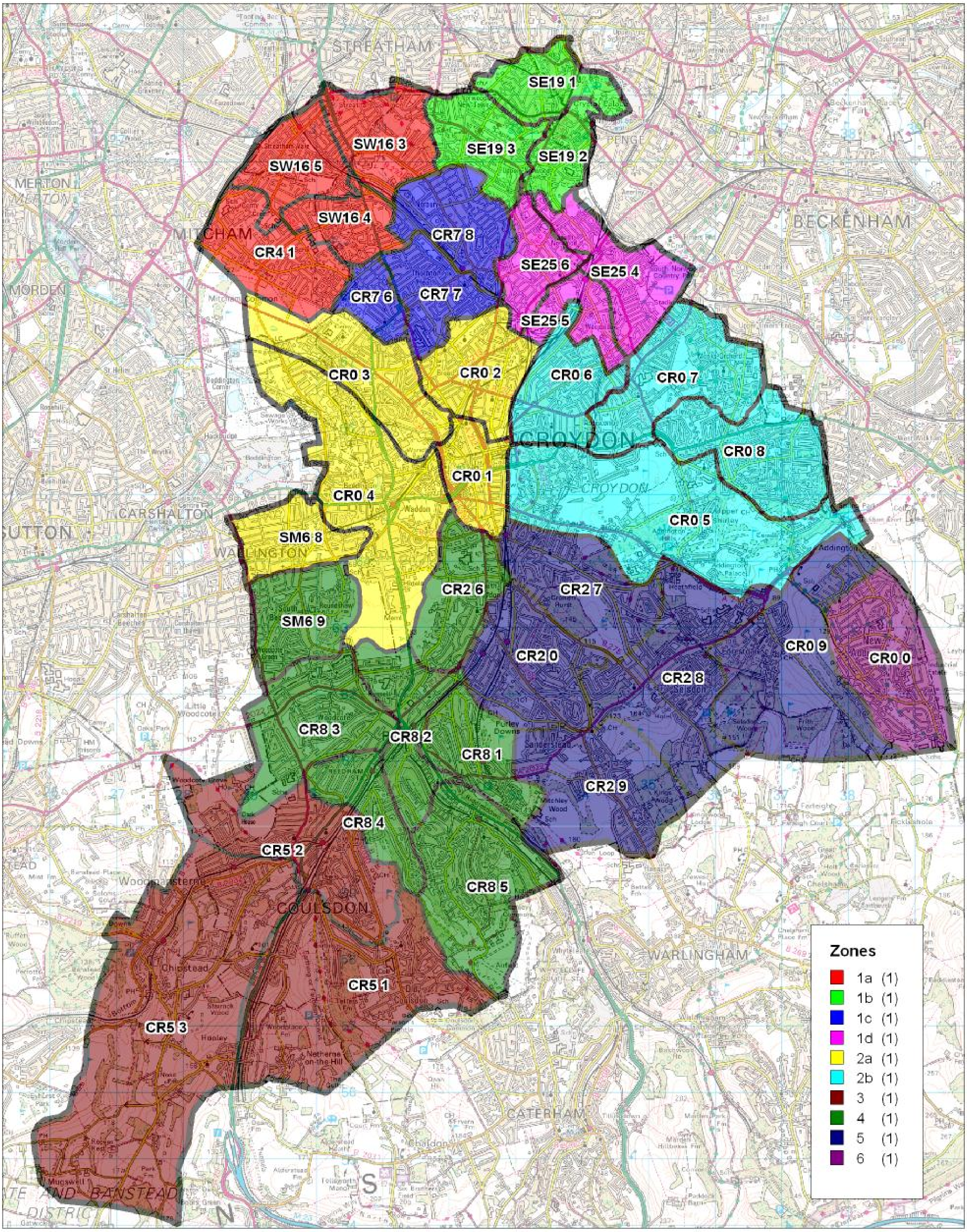
Central Croydon

Town Centres

District Centres

Local Centres

Parades



Croydon Postcode Sectors & Zones

26/11/2008

Pitney Bowes MapInfo

Minton Place, Victoria Street, Windsor, Berkshire, SL4 1EG
Tel: 01753 848200
Web: www.mapinfo.co.uk

Appendix 1 – Audit of Town and District Centres

1. Introduction

1.1 The audits in this Appendix cover the eight town and district centres of - Norbury, Thornton Heath, Coulsdon, Purley, Selsdon, South Norwood, Upper Norwood and New Addington. They examine the performance of the existing centres against the key PPS6 indicators of vitality and viability. The audits were undertaken by Drivers Jonas in September 2008.

2. Norbury

2.1 Norbury is classified as a town centre within the adopted UDP town centres hierarchy. Norbury town centre forms a linear Edwardian development which follows the main A23 London Road, a busy arterial commuter route in the north west of the Borough. The Primary Shopping Area (PSA) is located within a designated conservation area.

2.2 Our conclusions from the 2003 study stated:

> *The centre continues to have a high proportion of services, the number of units having risen since 1996. Vacancies are still relatively high although there has been some decline since 1996. Vacancies are most noticeable to the north of the railway bridge, which is the weakest part of the centre. The former public house on the northern edge of the centre is currently being marketing for retail and showroom uses.*
>
> *In respect of convenience trading, the household shopping survey indicates that Norbury continues to perform relatively poorly. The former Kwik Save unit is occupied by 'Cut Price Supersave'.*
>
> *There is a significant, albeit reducing, amount of office / business development to the south of the centre, which may provide some trade to the centre in addition to that from surrounding residential areas.*

Quantity and Quality of Retailing and Other Commercial Uses

2.3 In terms of the diversity of retail uses within the town centre, the overall mix of uses is summarised in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	5,485 (27%)	43 (25%)	5,092 (25%)	40 (23%)	4,487 (25%)	36 (21%)
Convenience Shops	3,862 (19%)	23 (13%)	3,698 (19%)	23 (14%)	3,149 (17%)	21 (12%)
Service Shops	8,275 (41%)	77 (46%)	9,320 (46%)	84 (49%)	8,800 (49%)	94 (56%)
Vacant	2,611 (13%)	28 (16%)	2,058 (10%)	23 (14%)	1,536 (9%)	18 (11%)
Total	20,233	171	20,168	170	17,972	169

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

4. Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.

2.4 The centre is dominated by independent service uses consisting, in the main, of restaurants and fast-food takeaways. In addition the centre has a medium sized Iceland store (446 sq. m gross) and a Somerfield store (966 sq. m gross) which provide the main convenience offer. The Somerfield store has no dedicated off-street parking and at the time of our survey was quiet.

2.5 The survey indicates that a quarter of the floorspace is given to comparison retailing. Whilst this includes a Superdrug, many of the stores are concession or discount retailing. There are no major national multiple retailers present and fashion provision is limited.

2.6 Since 2000, the number of units given over to service use has increased, with the comparison and convenience offer remaining broadly constant. This is likely to be a result of the large out-of-centre Sainsbury's store in Streatham (6,038 sq m gross) to the north of the centre on Streatham High Road which continues to draw significant trade from the centre.

Demand for Representation by Retailers and Other Commercial Operators

2.7 The latest report on retail requirements by Focus in November 2008 states that there are currently three retailers with requirements in Norbury. One charity shop (Scope), Take Zwo a Caribbean Take-Away restaurant and Peacocks a fashion retailer are listed. It should be noted that these requirements are not specifically for Norbury, rather for a list of destinations in south London of which Norbury is one.

Primary Shopping Area and Shopping Frontages

2.8 The Primary Shopping Area (PSA) extends as far as the railway line to the north, and Northborough Road to the south.

2.9 All designated frontages, both primary and secondary, are along London Road (A23). The primary frontage is flanked to the north and south of the centre by secondary frontage which extends as far south as Northborough Road and as far as the railway to the north.

Vacant Street-level Property

2.10 Based on the site visit undertaken in September 2008 and the information provided by Croydon Council it is evident that Norbury has a relatively high vacancy rate when compared to the other main centres.

2.11 It was noted from our surveys that a number of the vacant properties have been without an occupier for an extended period of time. Vacancies continue to be most noticeable to the north of the centre beyond the railway bridge, although a concentration of vacant properties is evident at the northern edge of the designated primary frontage.

Pedestrian Flows

2.12 Independent data on pedestrian flows for Norbury is not readily available. Pedestrian flows were noted at either side of London Road. At commuting time increased flows are seen at the northern end of the centre around Norbury Rail Station.

Accessibility

2.13 There is relatively little on-street parking in Norbury. On-street parking is not permitted on the main London Road as it is a TfL identified "red route", with parking and stopping restrictions on both sides of the road. London

Road has one lane of traffic in each direction, and a northbound bus lane. There is, however, a small amount of on-street parking available in side streets along London Road. There is a small Pay and Display Car Park on Granville Gardens at the back of Streatham High Road.

2.14 Norbury rail station is located to the north of the centre along London Road. It is served by Southern Train services which run to Central London, Croydon, Gatwick Airport and East Grinstead. A number of bus services run north-south along London Road including 50, 109, 250, 255 and G1. These services run to destinations such as Streatham, Brixton, Stockwell and Battersea to the north and Pollards Hill and Croydon town centre to the south.

Centre Environmental Quality

2.15 The retail frontages and protruding signs generally create a poor sense of environmental quality.

2.16 Traffic flows in the centre are relatively high as the London Road is a busy arterial road linking London to Croydon and the south of England. Whilst the pavements are generally wide with designated crossings at both ends of the centre, the quality of the pavements is poor.

Retail Commitments and Proposals

2.17 There are currently no significant retail development proposals in Norbury.

Development Sites

2.18 The adopted UDP includes four development site allocations within the town centre boundary. H75, the largest identified site, is currently vacant, although this is outside the PSA and would not be suitable for major retail development. To the north of this development site off Strathbrook Road there is a residential development which is currently being constructed.

2.19 There are no significant developable sites within the main town centre area, specifically the Primary Shopping Area (PSA). Any increase in retail floorspace is likely to be by virtue of intensification of existing floorspace.

3. Upper Norwood

3.1 Upper Norwood lies on the boundary of the London Boroughs of Croydon, Lambeth and Bromley. Not all of the centre falls within LB Croydon; the north side of Westow Hill lies within the boundary of LB Lambeth. This survey information only takes account of characteristics, and floorspace, of the centre lying within Croydon Borough. The whole of the centre lies within a designated conservation area.

3.2 Our conclusions from the 2003 study stated:

> *Other than an increase in comparison floorspace (but not units) there do not appear to be any significant changes in Upper Norwood. The household shopping survey indicates a modest overall convenience performance for the centre, although from visual inspection, the Safeway store appeared to be attractive and trading reasonably.*

Quantity and Quality of Retailing and Other Commercial Uses

3.3 The centre has a broad retail offer. The principal retailers in the centre include Woolworths and Sainsbury's (3,497sqm gross). Floorspace within the centre in 1996, 2000 and 2007 is set out in the table below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	6,117 (30%)	39 (30%)	4,759 (25%)	38 (30%)	5,126 (28%)	35 (27%)
Convenience Shops	5,064 (25%)	14 (11%)	4,448 (23%)	10 (8%)	3,626 (19%)	8 (6%)
Service Shops	7,828 (38%)	60 (46%)	8,546 (44%)	64 (51%)	7,771 (41%)	71 (54%)
Vacant	1,603 (7%)	17 (13%)	1,619 (8%)	14 (11%)	2,283 (12%)	17 (13%)
Total	20,612	130	19,372	126	18,807	131

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

3.4 The centre remains dominated by service retailers, including national multiple retailers; Pizza Express and Costa Coffee. The proportion of comparison retailers is roughly equivalent to that in 2000. However, the number of convenience retailers has diminished slightly. The quantum of unoccupied floorspace has increased.

Demand for Representation by Retailers and Other Commercial Operators

3.5 A review of the Focus database shows that two retailers are seeking premises in Upper Norwood. Papa Johns (pizza takeaway) is looking for premises in a number of centres across the UK, including Upper Norwood. The charity Save the Children is also looking for premises.

Primary Shopping Area and Shopping Frontages

3.6 The UDP defined PSA extends along the full length of Westow Street and along Westow Hill from the junction with Westow Street to the junction with Beardell Street. This area does not include any of the northern side of Westow Hill as this is located outside the Borough.

3.7 The designated frontages are largely focused along Westow Street and Westow Hill, with the majority of primary frontage along Westow Street and the western end of Westow Hill.

Vacant Street-level Property

3.8 Several vacant units were identified at the time of the site visit. The survey data suggests that there has been an increase in vacant property since 2000. Vacant properties are concentrated along Church Road which is undesignated and is not within the core area of the town centre.

Pedestrian Flows

3.9 Pedestrian footfall in the centre at the time of the survey was high, especially along Westow Street and Westow Hill. Less pedestrian activity was noted along Church Street.

Accessibility

3.10 On-street parking is very restricted in Upper Norwood. There are single yellow lines on most of the main routes through the centre. However, there is a large amount of multi-storey off-street car parking to the rear of the Sainsbury's store.

3.11 Although it does not have its own rail station, Crystal Palace station is located less than half a mile from the centre. Upper Norwood is also well connected by bus services (196, 249, 450, 468, X68, N68) which link to destinations such as Anerley, West Croydon, Clapham Common, Elephant and Castle, Tottenham Court Road and Russell Square.

Centre Environmental Quality

3.12 As noted above the whole of the centre is within a conservation area and much of the centre is of high environmental quality in particular along Westow Street and Westow Hill. The centre serves an affluent catchment, is attractive and appears popular, the type of retailers present is indicative of this. The signage and shop frontages are in good condition and result in a pleasant feel to the centre.

Retail Commitments and Proposals

3.13 There are no existing retail commitments or proposals for development identified in Upper Norwood.

Development Sites

3.14 No significant development sites were noted. The only site likely to be suitable for retail development is opposite the Sainsbury's foodstore, although as infill development this would not be significant in scale.

4. Thornton Heath

4.1 Thornton Heath is classified as a Town Centre within the adopted UDP town centres hierarchy. It is an Edwardian/Victorian centre which is focused around the junctions of the High Street (B266) and Parchmore Road (B273) close to Selhurst Park football ground.

4.2 Our conclusions from the 2003 study stated:

> *There do not appear to be any significant changes in Thornton Heath, other than some increase in service floorspace and some decline in vacancies. The household shopping survey suggests that Thornton Heath is trading reasonably. However, the responses are no doubt dominated by the performance of the Tesco store rather than the small independent stores which on the ground appear to be trading less well.*
>
> *The Borough Council is currently implementing a Sports Centre including swimming pool and sports hall on the High Street.*

Quantity and Quality of Retailing and Other Commercial Uses

4.3 In terms of diversity of retail uses within the town centre, the overall mix of uses is summarised in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	5,534 (24%)	52 (31%)	6,195 (24%)	69 (35%)	4,867 (24%)	43 (28%)
Convenience Shops	8,916 (38%)	28 (17%)	9,018 (35%)	25 (13%)	7822 (40%)	24 (16%)
Service Shops	6,053 (26%)	61 (36%)	8,558 (33%)	75 (39%)	5,876 (30%)	69 (46%)
Vacant	2,670 (12%)	27 (16%)	2,104 (8%)	26 (13%)	1,203 (6%)	15 (10%)
Total	23,173	168	25,875	195	19,769	151

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

4.4 Since 2000 there has been a decrease in the total quantum of retail floorspace in the centre. The centre continues to be dominated by service uses, with the comparison and convenience retail offer remaining broadly similar over time. The vacancy rate has fallen since the 2000 survey indicating the strength of the centre.

4.5 The centre benefits from two large convenience stores, Iceland (954 sq. m gross) which is adjacent to the train station and Tesco (6,170 sq m gross) which is on the main junction of the High Street and Parchmore Road. Approximately one third of the tradeable floorspace of Tesco is assumed to be comparison retailing which provides a significant proportion of the centres comparison offer. Other stores include Superdrug.

4.6 There is a concentration of ethnic food and other shops at either end of the centre serving the local population. This results in a lower vacancy rate than that of comparable centres.

4.7 The Thornton Heath catchment is also served by an out-of-centre Sainsbury's store (7,287sqm) approximately one km from the centre at Selhurst Park football ground.

Demand for Representation by Retailers and Other Commercial Operators

4.8 A Focus retail requirements report in November 2008 identifies three retailers with requirements for Thornton Heath; McDonalds restaurant and Take Zwo a Caribbean Take-Away restaurant and Priceless Shoes.

Primary Shopping Area and Shopping Frontages

4.9 The UDP defined PSA extends from Melfort Road in the west to Gillett Road in the east.

4.10 The primary and shopping frontages encompass the length of the High Street extending a short distance to the east where the road becomes Brigstock Road.

4.11 On the corner of Parchmore Road and the High Street a significant and recent Sport England funded Leisure Centre has been developed which creates a break in the shopping frontage designation.

Vacant Street-level Property

4.12 A small number of vacant units were identified. The vacancy rate in the centre is lower than other centres assessed. The vacant units were irregular in location with no identified concentration within the centre.

Pedestrian Flows

4.13 The location of the centre astride two busy B Roads leads to traffic dominating the centre. Two main pedestrian crossings outside the train station and the Tesco foodstore help facilitate shopper movements.

4.14 Increased levels of footfall were identified along the main shopping street outside and opposite the Tesco foodstore. Pedestrian footfall was notably low towards the east of the centre as the High Street becomes Whitehorse Road.

Accessibility

4.15 There is little by way of on-street parking in Thornton Heath along the main shopping streets. However, both the Tesco and Iceland stores have a significant amount of on-site parking. There is also a shoppers car park to the rear of High Street off Garnett Road.

4.16 Thornton Heath is well connected by bus and rail with elsewhere in London and the South East. Thornton Heath station is located to the west of the centre and is served by Southern Train services to London Victoria, West Croydon, London Bridge, Sutton, Caterham and Epsom Downs. Bus services include 198, 250, 450, 468, X68 and N68 and connect the centre with destinations such as Shrublands, Brixton, Elephant and Castle, Russell Square, Tottenham Court Road and West Croydon.

Centre Environmental Quality

4.17 Much of the centre is of reasonable environmental quality. The ease of movement is restricted to a degree by the main road through the centre and there are narrow pavements in places. The centre appeared busy at the time of our survey and was clearly catering for a number of shoppers.

Retail Commitments and Proposals

4.18 There are currently no significant retail development proposals coming forward in Thornton Heath Town Centre.

Development Sites

4.18 A potential development site was identified at the site on the corner of Woodville Road and High Street where there is currently a garden centre. This is adjacent to the new Leisure Centre which has recently been developed. This is identified in the 2006 UDP as a potential site for mixed-use development and would be suitable for ground floor retail.

5. South Norwood

5.1 South Norwood district centre lies in the northern part of the Borough at Norwood Junction railway station. Much of the centre is within a conservation area.

5.2 Our conclusions from the 2003 study stated:

> *Since 1996 has been a slight increase in services and decrease in vacancies. On the ground the centre appears to have improved in terms of its retail offer. Also vacancies are now not particularly noticeable – it may be that the rate has declined further since 2000.*

Quantity and Quality of Retailing and Other Commercial Uses

5.3 Somerfield supermarket (1,916 sq.m gross) provides the main convenience retail offer in the centre. It is located on Station Road and South Norwood station, from where overground trains depart to destinations such as London Bridge, London Victoria, Horsham and Caterham. The floorspace figures in 1996, 2000 and 2007 are set out below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	2,990 (20%)	33 (22%)	2,582 (18%)	27 (19%)	2,486 (17%)	23 (15%)
Convenience Shops	3,677 (25%)	20 (13%)	3,351 (23%)	18 (12%)	3,273 (22%)	22 (14%)
Service Shops	5,827 (39%)	67 (45%)	6,760 (47%)	76 (52%)	6,027 (41%)	72 (47%)
Vacant	2,414 (16%)	29 (20%)	1,707 (12%)	24 (17%)	2,899 (20%)	36 (24%)
Total	14,908	149	14,400	145	14,685	153

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

5.4 The centre is heavily dominated by service shops, which account for almost 50% of all units in the centre. The quantum of both convenience and comparison floorspace has stayed broadly the same since the last update in 2000, but there has also been a noticeable rise in the number of vacant units.

Demand for Representation by Retailers and Other Commercial Operators

5.5 A review of the Focus retailer requirements database in November 2008 has not identified any retailers in search of retail premises in South Norwood.

Primary Shopping Area and Shopping Frontages

5.6 The PSA extends from the junction of South Norwood Hill and High Street in the east and to the end of the primary shopping frontage in the west, a short distance beyond Station Road.

5.7 The designated shopping frontage is largely focused along High Street, close to the junction with Station Road. There is also a stretch of secondary frontage located to the east of South Norwood Hill on High Street.

Vacant Street-level Property

5.8 Whilst the centre clearly has a number of vacant units, we noted a definite concentration towards the eastern end of High Street at the time of our survey. This is supported by the survey data, which suggests that there has been an increase of some 1,000 sq. m of vacant floorspace in the centre since 2000.

Pedestrian Flows

5.9 Pedestrian footfall in the centre is focused around the primary designated frontages in the west of the centre. At the time of the survey, footfall in the east was found to be comparatively low.

Accessibility

5.10 There is little on-street parking available in South Norwood. However, there is a small car park along Belgrave Road/Grosvenor Road to the rear of High Street and also next to the station. The Somerfield store on Station Road has a small customer car park to the rear.

5.11 Norwood Junction station is located to the east of the centre. Train services from the station run to a variety of destinations, including West Croydon, London Bridge, London Victoria, Caterham, Sutton, Tunbridge Wells and Horsham. Bus services include 75, 130, 157, 196, 197, 312 and 410. These services run towards Crystal Palace, Elephant and Castle, Peckham and Lewisham in the north and to Morden, Croydon Metropolitan Centre and South Croydon to the south.

Centre Environmental Quality

5.12 As noted above, much of the centre is within a conservation area. The centre is of reasonable environmental quality, there appears to be a clear distinction between the High Street proper towards the centre of South Norwood and the eastern area, with the central areas benefiting from a high degree of environmental quality including street furniture and planting.

Retail Commitments and Proposals

5.13 There are currently no commitments for major residential or retail development in South Norwood.

Development sites

5.14 A number of small development sites are identified within South Norwood Town Centre in the 2006 UDP. However, proposals are yet to come forward for these sites. No additional development sites were identified from the site visits.

6. Coulsdon

6.1 Coulsdon lies to the south west part of the Borough and serves a prosperous and low density residential area. The centre continues to benefit from the passing trade from car borne commuters on the A23 trunk road travelling to and from the M25 and M23.

6.2 Our conclusions from the 2003 study stated:

> *Since 1996, there has been an increase in service floorspace and a decline in the vacancy rate. The centre continues to perform well, as indicated by the decline in the vacancy rate. The household shopping survey also indicated that Coulsdon convenience shops were performing reasonably well. The Waitrose supermarket continues to be popular and the small car park to the rear of the store is invariably used to capacity.*

> *Coulsdon's shopper environment will be improved when traffic is reduced through the implementation of the town centre improvement scheme (formally the Coulsdon Inner Relief Road). This is a Transport for London scheme that relates solely to the new road, which we understand is due for completion in 2005. The Coulsdon Town Centre Improvement Scheme is one of the catalysts for an action plan for an area that includes the centre of Coulsdon.*

Quantity and Quality of Retailing and Other Commercial Uses

6.3 Retailer representation includes Boots, Woolworths and Waitrose (912 sq.m gross). Floorspace within the centre at 1996, 2000 and 2007 is set out in the table below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	4,300 (35%)	47 (36%)	5,008 (34%)	47 (35%)	6,395 (44%)	47 (36%)
Convenience Shops	2,178 (17%)	13 (10%)	2,430 (15%)	10 (9%)	1,261 (8%)	7 (5%)
Service Shops	5,328 (43%)	60 (46%)	6,924 (49%)	66 (51%)	5,835 (40%)	66 (50%)
Vacant	666 (5%)	10 (8%)	305 (2%)	6 (5%)	1,121 (8%)	12 (9%)
Total	12,502	130	14,667	129	14,612	132

<u>Notes:</u>

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*
5. *Waitrose store was rationalised between the 2000 and 2007 Land Use Surveys.*

6.4 Since 2000, there has been a decrease in convenience and service floorspace and an increase in the number of vacant units, rising from 6 to 12. The quantum of comparison floorspace has increased significantly, and now includes high end retailers such as Bang and Olufsen. The shopping survey indicates that both convenience and comparison retailers are trading well. The Waitrose supermarket continues to draw a substantial number of customers.

Demand for Representation by Retailers and Other Commercial Operators

6.5 Using the Focus database (November 2008) shows four retailers expressing requirements for retail premises in Coulsdon. These are The Shaw Trust and the British Heart Foundation, both registered charities, Superdrug and Mandarin Stone an interior stone specialist.

Primary Shopping Area and Shopping Frontages

6.6 The current UDP-designated PSA extends to the railway line in the north, to the junction between Lion Green Road and Brighton Road to the south, and along Chipstead Valley Road from Brighton Road to the junction with Woodcote Grove Road.

6.7 The UDP defined primary and secondary shopping frontages run from The Avenue to Lion Green Road along the A23 and also along Chipstead Valley Road from the junction with the A23 to the junction with Woodcote Grove

Road. The majority of the primary designated frontage is identified along Chipstead Valley Road and along the northern section of Brighton Road within the town centre up to the railway line.

Vacant Street-level Property

6.8 A number of small vacant units were identified during the site visit. The floorspace study demonstrates that the quantum of vacant floorspace has increased four-fold since the last study. The largest vacant unit was 139 sq m gross and was located at 168 and 171 Brighton Road.

Pedestrian Flows

6.9 The location of the centre along the A23 means that traffic dominates the pedestrian environment along Brighton Road and there are few crossing places. However, the pedestrian environment has been significantly improved since the Coulsdon Relief Road (completed 2007) was constructed as it has alleviated the heavy traffic that the centre previously experienced. Traffic is less heavy along Chipstead Valley Road. At the time of the study, it was evident that this part of the centre still experiences greater pedestrian footfall than along the A23.

Accessibility

6.10 There is a low provision of car parking in Coulsdon district centre. There is a small amount of on-street parking along the A23, Chipstead Valley Road and Lion Green Road. There is also a small public car park near to the junction of the A23 Brighton Road and Lion Green Road. The Waitrose store has a medium sized car park for customers located to the rear.

6.11 Coulsdon is well served by public transport. Coulsdon South station is located towards the south of the centre on Brighton Road, and Smitham Station is located to the north. Both stations are served by Southern Train services and connect Coulsdon with Tattenham Corner, Merstham and Gatwick airport. The 405 bus route runs along Brighton Road towards West Croydon to the north and Redhill to the south. There are a number of other bus services which run along Chipstead Valley Road and Marlpit Lane.

Centre Environmental Quality

6.12 The centre is of reasonable environmental quality, the pavements are wide and facilitate pedestrian movement.. The main roads do reduce the quality of the centre's environment although the current situation is a marked improvement from when the Relief Road was not in operation.

Retail Commitments and Proposals

6.13 A new Sainsbury's store on UDP development site H83 (Pinewood Garage) has been granted permission although construction has yet to begin. Three applications have been refused in 2005, 2006 and 2007 for the redevelopment of the former Red Lion Pub site on Brighton Road opposite Chipstead Valley Road as a mixed-use development including an Aldi foodstore.

6.14 However all the refusals related to design considerations rather that the principle of a new foodstore in the location to which the Council has not raised objection.

Development Sites

6.15 The car park on Lion Green Road has been identified as a potential site for future development.

Regeneration Strategies

6.16 A 'Coulsdon Area Regeneration Strategy' (SPG20) was published by the Council in October 2004. The opportunity for regeneration arose in part from construction of the town centre Relief Road. The strategy identifies a number of sites with potential for improvement or redevelopment. Thes included:

- The Red Lion PH site – on which there have subsequently been proposals for a discount foodstore;
- Other properties on the west side of Brighton Road;
- The Pinewood site – now a Sainsbury commitment; and
- The Lion Green Road car park

6.17 The Council owns the Lion Green Road car park has subsequently considered its potential for a mixed use development including retail.

7. Purley

7.1 Purley lies in the southern part of the Borough between Croydon and town centre and Coulsdon district centre. Purley is situated around the busy junction of the two main trunk roads in the south of the Borough, the A23 and A22.

7.2 Our conclusions from the 2003 study stated:

> *The principal change in Purley has been closure of the Sainsbury store in 2001. This has lessened the attractiveness of the north eastern part of the centre and has no doubt been responsible for an overall significant increase of vacancies in the centre from 10% of units in 1996 to 19% of units in 2002.*
>
> *Tesco undertook an extension of their store in 2001 and now experiences no competition as the only food multiple in the centre. However, severance of the Tesco store from the remainder of the town centre and the effect of this on the performance and attractiveness of the centre as a whole is one of the issues being addressed through preparation of a draft regeneration strategy for the town.*
>
> *The household shopping survey indicates that Tesco is performing strongly.*

Quantity and Quality of Retailing and Other Commercial Uses

7.3 Key retailers in the centre include Tesco, Boots and Laura Ashley. Tesco is separated from the main shopping area by a large traffic intersection between the A23 and the A22. It attracts customers from a large catchment. In 2006 a new mezzanine floor level increased the gross floorspace of Tesco to 9,540 sq m. Floorspace figures for 1996, 2002 and 2007 are set out in the table below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	4,836 (19%)	41 (27%)	7,026 (23%)	29 (21%)	7,919 (29%)	32 (25%)
Convenience Shops	10,065 (40%)	18 (12%)	8,875 (29%)	7 (5%)	6,669 (25%)	6 (5%)
Service Shops	7,753 (31%)	77 (51%)	7,719 (26%)	77 (55%)	7,759 (29%)	75 (58%)
Vacant	2,315 (10%)	14 (10%)	6,749 (22%)	27 (19%)	4,742 (17%)	16 (12%)
Total	24,969	150	30,369	140	27,089	129

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Permission granted to extend the Tesco Store in 2001. Retail figures were adjusted in the DJ Retail Update Study to reflect these changes.*
5. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

7.4 The retail offer of Purley district centre continues to be dominated by service shops. The total comparison and convenience retail floorspace has reduced since the 2002 survey. Whilst Tesco is still performing well, the store continues to be detached from the district centre due to the major roads running through the centre.

Demand for Representation by Retailers and Other Commercial Operators

7.5 There is demand from a number of retailers for presence in Purley town centre. These include Superdrug, Timpson, Tile Depot, The Shaw People, BoConcept interior design, Caffe Nero, British Heart Foundation, and Between the Lines, a stationary chain operating in the south east.

Primary Shopping Area and Shopping Frontages

7.6 Within the east of the centre, the designated PSA runs from Russell Hill Place in the north to Whytecliffe Road in the south and is broadly encompassed by the two streets. The PSA also extends north along the A23 to include frontages up to the junction with Foxley Lane.

7.7 UDP designated primary and secondary shopping frontages are focused around High Street and Brighton Road, with the majority of primary designated frontages located close to the junction between High Street and Brighton Road. There is also some secondary shopping frontage along A23 Purley Way at the northern end of the town centre.

Vacant Street-level Property

7.8 There were a small number of vacant properties identified during the site visit. However, the data shows that there has been a decline in vacant floorspace since the last study in 2000. A number of the vacant units are located on High Street.

Pedestrian Flows

7.9 There is reasonably good pedestrian footfall along Brighton Road although it was noticeably lower on High Street. The severance of the centre by the A22 and A23 minimises shopper movement between Tesco and the main town centre.

Accessibility

7.10 Purley Way and Brighton Road are both identified by TfL as “red routes”, and there are therefore restrictions on parking and stopping on the routes. There is little by way of on-street parking on Purley Way or on Brighton Road, although there is a small amount of on-street parking along High Street, where parking is restricted to 1 hour at peak times.

7.11 There are off-street car parks on Russell Hill Place and on both sides of Whytecliffe Road South, near to the station. In addition, the Tesco car park allows for combined shopping trips.

7.12 Purley rail station is located to the south of the main shopping area. It is served by Southern Train services which connect with destinations such as Gatwick Airport and Caterham. There are a significant number of bus services, including 60, 127, 166, 405, 407, 412, 434 and 466. These services connect Purley with Tooting Broadway, West Croydon and Streatham to the north and Banstead, Redhill, Caterham, Woodmansterne and Addington Village to the south.

Centre Environmental Quality

7.13 The environmental quality is reasonably good along Brighton Road and High Street. However, the major A22 and A23 roads cut across the centre, and severely diminish the environmental quality of the west of the centre.

Retail Commitments and Proposals

7.14 There are several proposals which are coming forward for retail, residential and mixed-use development in Purley Town Centre. Current proposals include 4,002 sq m retail floorspace at the former Purley District War Memorial Hospital and the corner site on Banstead Road/Russell Road. Both sites are identified development sites in the Adopted 2006 Croydon UDP. Construction has not yet begun on the old hospital site.

Development Sites

7.15 No additional development sites were identified in Purley through the site visits. However, a number of sites were identified in the UDP across Purley Town Centre for residential and mixed-use development. These include a number of sites adjacent to High Street and Whytecliffe Road.

Regeneration Strategies

7.16 The Council is well advanced with the preparation of a regeneration strategy for Purley. This has been prompted by a variety of considerations, including:

- A heavily congested road system which makes visiting and living in Purley unpleasant.
- A public realm which restricts pedestrian access and movement.
- An unattractive streetscape.
- A declining local economy evident from the number of vacant shops and lack of diverse retail outlets.
- A negative public image which discourages inward investment.

7.17 One of the key features of the regeneration strategy is resolution of the traffic conflict at the Brighton Road / Godstone Road junction and associated with this the creation of more effective pedestrian linkages between the Tesco store and the remainder of the town centre.

8. Selsdon

8.1 Selsdon lies in the southern part of the Borough around the junction of Addington Road and Farley Road.

8.2 Our conclusions from the 2003 study stated:

> *Selsdon continues to perform well. There has been a decrease in both comparison and convenience shops and a corresponding increase in services. The household shopping survey indicates that Selsdon is a popular centre for residents of this part of the Borough.*
>
> *Planning permission has been granted for a Sainsbury's supermarket (3,500 sq m gross) on the car park site to the west of the centre. It will be relevant to monitor the effect of the Sainsbury's on the Selsdon convenience shops following its opening.*

Quantity and Quality of Retailing and Other Commercial Uses

8.3 Selsdon has a number of large shops including Sainsbury's (3,585 sq m gross), Woolworths and Aldi. Both supermarkets have a significant amount of associated car parking. Floorspace within the centre in 1996, 2000 and 2007 is set out in the table below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	2,356 (31%)	25 (41%)	2,078 (28%)	19 (31%)	2,851 (28%)	22 (37%)
Convenience Shops	2,510 (33%)	11 (18%)	1,905 (26%)	6 (10%)	3,297 (33%)	6 (10%)
Service Shops	2,559 (34%)	22 (36%)	3,263 (44%)	34 (56%)	2,261 (24%)	26 (43%)
Vacant	185 (2%)	3 (5%)	163 (2%)	2 (3%)	1,797 (19%)	6 (10%)
Total	7,610	61	7,409	61	10,308	60

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

8.4 The survey identifies that the greatest change in floorspace since 2000 has been with convenience floorspace, which has increased significantly due to the opening of a new Sainsbury's store in the western part of the centre in 2004. Service shops continue to dominate the retail offer of the centre.

Demand for Representation by Retailers and Other Commercial Operators

8.5 The Focus database, checked November 2008, does not identify any retailer requirements for this centre.

Primary Shopping Area and Shopping Frontages

8.6 Selsdon shopping centre is linear in form. The PSA extends from and includes the Sainsbury's superstore in the west and up to the new Aldi store in the east.

8.7 The designated primary and secondary frontages are on the south side of Addington Road, with a small area of secondary frontage on the north side of Addington Road in the west of the centre. Although the main shopping frontages are on both the north and south of Addington Road, the designated frontages extend further on the north side.

Vacant Street-level Property

8.8 There are very few vacant properties in Selsdon. However, at the time of the Council's floorspace survey the former Somerfield supermarket premises at the eastern end of the centre had become vacant. Since the Council's survey the premises have been re-let and are now occupied by an Aldi supermarket. This will have significantly reduced the quantum of vacant floorspace in the centre from the those shown in the table above.

Pedestrian Flows

8.9 The centre experiences reasonably high levels of pedestrian footfall on Addington Road concentrated towards the main junction near Sainsbury's.

Accessibility

8.10 On-street parking in the centre of Selsdon is restricted by yellow line areas. However, towards the east of the centre, there is a small amount of on-street parking available. Both the Aldi and Sainsbury's supermarkets provide a large amount of customer parking.

8.11 Selsdon is not served by tram or train services. However, a number of public bus services stop on the main high street. The 64 bus runs from New Addington to Thornton Heath Pond, and the 359 from Addington Village to Selsdon.

Centre Environmental Quality

8.12 The environmental quality of the centre is reasonably good, there is a broad range of retailers that serve a relatively affluent catchment although Addington Road can get busy at peak times.

Retail Commitments and Proposals

8.13 Permission was granted on the old garage site, 230 Addington Road, for 1,635 sq m retail space, 35 car parking spaces and 12 residential units in 2004 (03/02821/P). However, no development has yet taken place on the site. The development site is identified in the 2006 UDP.

Development sites

8.14 No other significant development sites were identified in the centre.

9. New Addington

9.1 New Addington was designed to be a garden village in the mid-1930s, when several thousand new homes were constructed. Further development took place after World War II, with the construction of the main retail area and around 1,000 new homes. The centre is disconnected from the main urban areas of Croydon, although benefits from the Croydon Tram Link.

9.2 Our conclusions from the 2003 study stated:

> *The major change in New Addington has been closure of the Tesco store in 2001 and the opening of the Tramlink terminus. The Tesco closure will have reduced the convenience units and floorspace by approximately 350 sq m since 2000. There do not appear to be any other significant changes in New Addington, but the opening of Tramlink will have made Croydon town centre considerably more accessible to New Addington residents for shopping trips.*

Quantity and Quality of Retailing and Other Commercial Uses

9.3 The main shops in the centre include a Co-op supermarket, Iceland and Woolworths Local. Floorspace within the centre at 1996, 2000 and 2007 is set out below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	1,972 (31%)	16 (43%)	2,188 (35%)	18 (37%)	2,636 (44%)	19 (40%)
Convenience Shops	2,314 (36%)	13 (35%)	2,170 (35%)	11 (22%)	1,713 (28%)	11 (23%)
Service Shops	2,021 (32%)	7 (19%)	1,816 (30%)	20 (41%)	1,617 (27%)	16 (34%)
Vacant	69 (1%)	1 (3%)	0 (0%)	0 (0%)	75 (1%)	1 (2%)
Total	6,376	37	6,174	49	6,040	47

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Estimates of total convenience floorspace for major foodstores have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total gross floorspace figures.*

9.4 Since the last survey, the comparison and service offer of the centre have both increased marginally, with a slight decrease in convenience shops. There are few vacant properties, although this is likely to be due to the letting arrangements rather than a significant level of retailer demand.

9.5 In addition the market located in front of the shops provides an important and popular facility for residents on its days of operation.

Demand for Representation by Retailers and Other Commercial Operators

9.6 Data from Focus online taken in November 2008 indicates that only one retailer has expressed demand for presence in the centre – Superdrug.

Primary Shopping Area Shopping Frontages

9.7 The PSA identified in the UDP currently extends from Chertsey Crescent in the south west to the Central Parade row of shops in the north east. In the north west of the centre, the PSA extends to the junction between Parkway and Central Parade, and in the south east the junction between Central Parade and Arnhem Drive.

9.8 The designated frontages in the centre are along the north east side of central parade. Almost all of the centre is allocated as primary frontage, with the exception of a small area of secondary frontage towards the southern end of the centre.

Vacant Street-level Property

9.9 Both the survey data and the site visit demonstrated that there is a very low vacancy rate in the centre. However, occupiers are mainly value independent retailers.

Pedestrian Flows

9.10 At the time of the survey, the centre appeared to be well used, with numerous users arriving on foot.

Accessibility

9.11 New Addington was largely designed around the car, and so vehicle access and parking in the main retail area is reasonably straightforward. A large pay and display car park is provided for visitors to the centre and is directly opposite the main retail frontage.

9.12 New Addington is connected to Croydon town centre and Wimbledon beyond by Croydon Tramlink 3, for which there is a stop adjacent to the main shopping parade. In addition, a number of buses also connect New Addington with other destinations (64, 130, 314, T31, T32) such as Addington Village, Thornton Heath, Eltham, Forestdale and Norwood Junction.

Centre Environmental Quality

9.13 The environmental quality of the centre is poor and would benefit from retail frontages being upgraded.

Regeneration Strategy

9.14 The Fieldway and New Addington Local Neighbourhood Renewal Plan has been developed since 2003 to achieve regeneration within New Addington. A part of this strategy is to achieve renewal of Central Parade. This includes:

- Developing a multi-service One-Stop facility to include Housing, Social Services, Job Centre Plus and other appropriate services; and

- Developing a new comprehensive Parking Policy as part of the master plan (to include minor widening of Park Way; one way sections to accommodate buses; traffic calming programmes; and additional crossing points in busy places).

9.15 As part of these proposals the Council has entered into discussions with Tesco in respect of development of a large foodstore on the western side of Central Parade. The store is proposed to be part of a comprehensive development including community facilities on land owned by the Council.

9.16 We understand that a resolution to grant planning permission for a scheme has been granted subject to achievement of a satisfactory Section 106 agreement.

Other Retail Commitments and Proposals

9.17 A planning appeal was upheld in June 2008 for a Lidl store of 1,635 sq m retail floorspace gross (plus residential uses above) at the Cunningham Public House at 1 Parkway.

Development sites

9.18 No other potential development sites were identified in the centre.

Appendix 2 – Summary Audit of Local Centres

1. Introduction

1.1 Summary audits have been provided for the following centres in Appendix 3 – Addiscombe, South Croydon, Broad Green, Hamsey Green, Pollards Hill, Sanderstead, Shirley, Brighton Road, and Thornton Heath Pond. The audits were undertaken by Drivers Jonas in September 2008.

Broad Green

1.2 Broad Green is located close to the northern extent of Croydon town centre along the A235 London Road.

Retail Offer

1.3 The centre consists mainly value independent retailers, including some bulky goods retailers. However, there is a significant amount of new development on site at present. The development is largely residential: however, it also includes some nationally established convenience retailers such as Tesco Express and Somerfield (705 sq. m gross) towards the north of the centre and a large Lidl discount store (1,228 sq. m gross) at the southern end of the centre.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	1,175 (23%)	14 (27%)	696 (15%)	9 (18%)	737 (15%)	8 (15%)
Convenience Shops	874 (17%)	9 (17%)	1,158 (25%)	11 (22%)	1,214 (25%)	12 (22%)
Service Shops	2,559 (50%)	23 (44%)	2,568(55%)	25 (51%)	1,756 (36%)	24 (44%)
Vacant	499 (10%)	6 (12%)	260 (6%)	4 (8%)	1,178 (24%)	11 (20%)
Total	5,107	52	4,682	49	4885	55

<u>*Notes:*</u>

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.4 The survey shows that there has been a slight increase in the convenience and comparison retail offer in the centre. However, the vacancy rate in the centre is also shown to have increased since 2000.

Accessibility

1.5 On-street parking in Broad Green is largely restricted to side roads. Parking along the main A23 London Road is restricted by single and double yellow lines in places. A large customer car park is provided at the Lidl store to the south of the centre.

1.6 Broad Green is well linked by bus services (60, 64, 109, 198, 259m 289 and N159) which connect the centre with Old Coulsdon, Streatham, Thornton Heath Ponds, Brixton, Elmers End, Marble Arch and Purley. West Croydon station is located a short distance to the south of the designated centre.

Commitments and proposals

1.7 There is a significant amount of new retail and residential development coming forward on the fringes of Broad Green local centre. Such developments include 187-195 London Road (150 residential units and lower and upper ground floor retail); 303 London Road, Croydon (53 flats and ground floor retail); City House, 420-430 London Road & 3 Broad Green Avenue (319 flats and ground floor commercial/nursery use); 390-398 London Road (ground floor A3 use and 38 flats). 187-195 London Road is identified in the 2006 Croydon UDP as a site for mixed-use development.

Addiscombe

1.8 Addiscombe Local Centre is located in the centre of the Borough, to the east of Croydon town centre. It is linear in form and runs east to west. The centre is concentrated on the northern edge of the main road.

Retail Offer

1.9 The main retailers in the centre include Co-op, Alldays and Woolworths. In terms of diversity of uses within the town centre boundary, the overall mix of uses is summarised in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	3,757 (36%)	33 (32%)	3,455 (34%)	30 (30%)	2,555 (25%)	25 (24%)
Convenience Shops	2,060 (20%)	19 (18%)	1,753 (18%)	15 (15%)	2,626 (26%)	18 (17%)
Service Shops	3,911 (38%)	46 (44%)	4,186 (42%)	47 (48%)	4,796 (47%)	59 (57%)
Vacant	568 (6%)	6 (6%)	594 (6%)	7 (7%)	158 (2%)	2 (2%)
Total	10,296	104	9,988	99	10,135	104

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.

1.10 The survey figures show a small decrease in the centre's comparison goods offer and an overall increase in the convenience and service floorspace provision.

1.11 The vacancy rate for the centre is low and of the units currently vacant one was under refurbishment, indicating a sound level of health for a centre of this size.

Accessibility

1.12 There is a limited amount of on and off-street parking in Addiscombe. For the most part, the main shopping street, Lower Addiscombe Road, has double yellow lines with a small amount of on-street parking. Most on-street parking is limited to side streets. A small off-street customer parking area is provided to the rear of the Co-op.

1.13 There is a tram stop on the main shopping street, Lower Addiscombe Road, to the west of the main shopping area. Bus services include 289 (Elmers End – Purley), 367 (Bromley – West Croydon) and 312 (Norwood Junction – South Croydon).

Brighton Road

1.14 Brighton Road Local Centre is an Edwardian linear development along the A235 approximately 2.5km south of Croydon town centre.

Retail Offer

1.15 The majority of the retail units are independent retailers. Floorspace within the centre at 1996, 2000 and 2007 is set out below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	1,358 (38%)	10 (24%)	1,259 (36%)	9 (23%)	1,656 (41%)	12 (24%)
Convenience Shops	314 (9%)	5 (12%)	193 (5%)	3 (8%)	379 (9%)	5 (10%)
Service Shops	1,545 (43%)	19 (46%)	1,558 (44%)	20 (51%)	1,456 (36%)	22 (45%)
Vacant	359 (10%)	7 (17%)	543 (15%)	7 (15%)	559 (14%)	10 (20%)
Total	3,576	41	3,553	39	4,050	49

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.16 The statistics in the 2007 survey suggest a steady increase in the comparison and convenience retail offer whilst the level of services has declined moderately. The number of vacant units has increased from 2000 to 2007.

Accessibility

1.17 Car parking in the centre is limited. There is very little on-street parking space available along Brighton Road, although cars are able to park along the adjacent B269 Sanderstead Road and other less busy side streets.

1.18 There are a number of bus services running north-south along Brighton Road. Bus services 60, 166, 407 and 466 connect with Banstead, Epsom, Streatham, Addington Village, Caterham and Sutton. There is not a railway station on Brighton Road. However the centre is close to Purley Oaks and Sanderstead stations.

Hamsey Green

1.19 Hamsey Green is located in the far south of the Borough in the form of a linear centre with shops along both sides of the road. Small service lanes running parallel to the main road allow for easy access to the shops on either side of the road.

Retail Offer

1.20 The centre suffers somewhat due to tis close proximity to Warlingham which is outside of the Borough, specifically the large Sainsbury's store (5,199sq. m gross) at Warlingham Green.

1.21 The main retailers in the centre are Alldays, Co-op and a Lloyds pharmacy. Floorspace within the centre at 1996, 2000 and 2007 is set out in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	918 (25%)	7 (23%)	1,075 (27%)	9 (31%)	1,437 (36%)	14 (50%)
Convenience Shops	1,454 (39%)	8 (26%)	1,287 (32%)	5 (17%)	1,129 (28%)	2 (7%)
Service Shops	1,236 (33%)	15 (48%)	1,466 (37%)	13 (45%)	1,335 (34%)	11 (39%)
Vacant	84 (2%)	1 (3%)	167 (4%)	2 (7%)	84 (2%)	1 (4%)
Total	3,692	31	3,995	29	3,985	28

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.22 Since the previous land use survey, the convenience offer in the centre has reduced slightly with a small rise in comparison retailing in the form of small independent traders. The service provision has remained relatively constant whilst the number of vacant units continues to be low indicating the strength and attractiveness of the centre.

Accessibility

1.23 The centre has reasonably good car parking facilities. The small service lanes that run parallel to the main road allow for easy stop-off parking. In addition, there is some off-street parking provided at The Good Companions public house to the south of the centre. There is a small customer car park provided to the rear of the Co-op store.

1.24 Hamsey Green is less well connected to public transport than many of the other centres in the Borough. There are no rail or tram services. However, several bus services run from Hamsey Green, including 685 (Hamsey Green/Warlingham School to Farley Road) and 403 (Warlingham Sainsbury's/West Croydon Bus Station).

Pollards Hill

1.25 Pollards Hill is located in the north of the Borough on the A23 London Road between Norbury town centre and Thornton Heath Pond.

Retail Offer

1.26 The centre is characterised by small independent traders with a number of car showrooms and service uses.

1.27 The diversity of uses is set out in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	976 (24%)	13 (25%)	1,130 (27%)	12 (24%)	2,110 (37%)	24 (36%)
Convenience Shops	502 (12%)	7 (13%)	343 (8%)	6 (12%)	459 (8%)	7 (10%)
Service Shops	2,210 (54%)	23 (43%)	2,218 (52%)	25 (52%)	2,710 (48%)	31 (46%)
Vacant	427 (10%)	10 (19%)	566 (13%)	7 (14%)	376 (6%)	5 (7%)
Total	4,115	53	4,257	50	5,655	67

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.28 The figures demonstrate the lack of convenience offer in Pollards Hill with residents relying on nearby Norbury and Thornton Heath Pond for their convenience shopping needs.

Accessibility

1.29 As London Road is identified as a "red route" by TfL, on-street parking is heavily. However, adjacent side streets provide a significant amount of on-street parking. There are no visitor car-parks serving the centre.

1.30 Pollards Hill is not connected to either the train or tram network. However, a number of bus routes connect the centre with other destinations to the north and south (60, 109, 159). Destinations include Brixton, Croydon town centre, Marble Arch, Streatham, Old Coulsdon and New Addington.

Sanderstead

1.31 Sanderstead is a small linear centre located in the south of the Borough.

Retail Offer

1.32 It consists of a small row of shops along one side of Limpsfield Road (B269) adjacent to Sanderstead Recreation Ground.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	2,178 (51%)	10 (33%)	2,170 (54%)	9 (32%)	841 (15%)	8 (29%)
Convenience Shops	681 (16%)	7 (23%)	533 (13%)	6 (21%)	3,253 (57%)	4 (14%)
Service Shops	1,276 (30%)	12 (40%)	1,314 (33%)	13 (46%)	1,496 (26%)	15 (53%)
Vacant	110 (3%)	1 (3%)	0 (0%)	0 (0%)	97 (2%)	1 (4%)
Total	4,245	30	4,017	28	5,687	28

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*
4. *Waitrose – 5%of total floorspace assumed to be given over to comparison retailing.*

1.33 The introduction of the new Waitrose foodstore to the south of the centre has increased the convenience retail offer significantly.

1.34 The one vacant unit at the time of the survey was under refurbishment indicating the health of the centre.

Accessibility

1.35 There is metered on-street car parking available adjacent to the local shops. In addition, there is a large car park provided for customers at the Waitrose supermarket.

1.36 Sanderstead rail station is located some distance to the north of Sanderstead centre and does not provide easy access to the main retail area. Local bus services include 685 (Hamsey Green/Farley Road) and 403 (Warlingham Sainsbury's/West Croydon Bus Station).

Shirley

1.37 Shirley, a small local centre separated in the middle by a band of residential properties, is located to the east of Croydon town centre.

Retail Offer

1.38 The centre has a Co-op (288sqm gross) and a number of small independent retailers. Floorspace in the centre in 1996, 2000 and 2007 is set out below.

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	1,067 (26%)	14 (28%)	911 (19%)	13 (27%)	1,062 (25%)	12 (24%)
Convenience Shops	789 (19%)	8 (16%)	575 (19%)	5 (11%)	575 (14%)	5 (10%)
Service Shops	1,928 (46%)	24 (48%)	2,432 (59%)	28 (58%)	2,020 (48%)	25 (50%)
Vacant	357 (9%)	4 (8%)	130 (3%)	2 (4%)	531 (13%)	8 (16%)
Total	4,141	50	4,125	48	4,188	50

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.39 The Land Use survey identifies a relatively constant pattern in retailing in the centre. There has been a small increase in the number of vacant properties, these are not concentrated in any one area and should not necessarily be seen as a negative.

Accessibility

1.40 The A232 Wickham Road is identified by TfL as a red route. Traffic is therefore limited to stop-offs, and on-street parking is limited on the main road. However, a small amount of unrestricted on-street parking is available in side streets.

1.41 Shirley is not served by tram or train services, although it is a short way from West Wickham rail station (Southern Trains). Buses 119 and 198 run to The Collonades Croydon Airport/Bromley town centre and Shrublands/ Talbot Road respectively.

South Croydon

1.42 South Croydon is located immediately to the south of Croydon town centre. It forms a linear development along Brighton Road (A235) and Selsdon Road (B275).

Retail Offer

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	2,108 (21%)	15 (18%)	1,974 (19%)	14 (17%)	1,847 (18%)	13 (15%)
Convenience Shops	745 (8%)	8 (10%)	613 (6%)	5 (6%)	683 (7%)	6 (7%)
Service Shops	5,915 (60%)	46 (55%)	7,206 (69%)	56 (67%)	5,677 (55%)	56 (65%)
Vacant	1,137 (11%)	14 (17%)	699 (7%)	8 (10%)	2,049 (20%)	10 (12%)
Total	9,905	83	10,492	83	10,256	85

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.43 The centre continues to be dominated by service uses in terms of both floorspace and number of units. The comparison units are mainly independent retailers whilst the convenience offer is limited. The number of vacant units at 12% is relatively high.

Accessibility

1.44 Metered on-street parking in South Croydon is permitted in places along Brighton Road. There is off-street pay and display car parking at Spices Yard. Due to its proximity to Croydon town centre, South Croydon is easily accessible from some of the town centre car parks.

1.45 Although there are no tram stops in South Croydon, overland train services from South Croydon rail station run to London Bridge, London Victoria, Caterham, East Grinstead and Tattenham Corner. A number of bus services also run north-south along Brighton Road. Bus routes 60, 166, 312, 407, 466 and N68 connect with Banstead, Epsom, Streatham, Addington Village, Caterham, Norwood Junction, Tottenham Court Road and Sutton.

Thornton Heath Pond

1.46 Thornton Heath Pond is located on the London Road (A23) to the south of Pollards Hill. The centre suffers from the heavy flow of traffic and the large junction of the A23 and A235 restricts the ease of pedestrian movement.

Retail Offer

1.47 In terms of diversity of retail uses within the town centre, the overall mix of uses is summarised in the table below:

Use	1996		2000		2007	
	Floorspace gross sq m	Units	Floorspace gross sq m	Units	Floorspace gross sq m	Units
Comparison Shops	1,513 (19%)	18 (21%)	1,781 (23%)	23 (26%)	2,117 (24%)	26 (28%)
Convenience Shops	1,942 (25%)	22 (26%)	1,838 (24%)	21 (24%)	3,058 (34%)	26 (28%)
Service Shops	3,432 (44%)	34 (39%)	3,710 (48%)	40 (45%)	3,587 (40%)	37 (40%)
Vacant	899 (12%)	12 (14%)	335 (4%)	5 (6%)	218 (2%)	4 (4%)
Total	7,786	86	7,664	89	8,980	93

Notes:

1. *The categories are based on the classification provided by GOAD.*
2. *Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services.*
3. *Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore these have been excluded from our analysis.*

1.48 The centre is characterised by service use consisting of restaurants and fast-food takeaways. The comparison and convenience retail offer has increased since 2000 whilst the vacancy rate has continued to fall.

1.49 The centre benefits from two convenience stores, a Tesco Express (553sqm) and a Lidl supermarket (1,412sqm) which is adjacent to a McDonalds restaurant.

Accessibility

1.50 Due to the designation of the A23 London Road as a red route, on-street parking is not permitted on the main roads in the centre. However, there is some off-street parking provided in side streets. There is some off-street parking provided at the Lidl supermarket.

1.51 The nearest rail station to the centre is at Thornton Heath, circa 1km to the east. Bus services include 60 (Old Coulsdon/Streatham), 109 (Brixton/Croydon Park Street) and N159 (Marble Arch/New Addington).

Appendix 3 Audit of Purley Way Retail Parks

1. Introduction

1.1 There are six retail parks in Croydon located close to Purley Way (A23) in the western part of the Borough. These include:

- Valley Park Leisure Park,
- Thornton Road Retail Park
- The Colonnades
- Fiveways Retail Park
- Trafalgar Way Retail Park
- Purley Way Retail Park

1.2 In addition to the identified retail parks, there are a number of large units along Purley Way that that add significant out-of-centre floorspace.

1.3 Floorspace along Purley Way and its retail parks at the time of our survey in 2007 is set out in the table below:

Use	2007 Floorspace gross sq m
Comparison	88,550 (66%)
Convenience	19,050 (14%)
Service	11,020 (8%)
Miscellaneous	7,370 (5%)
Vacant	9,130 (7%)
Total	135,120

1.4 Purley Way contains a number of large retail warehouses selling a range of comparison goods. The comparison goods outlets mostly sell bulky goods such as, furniture, carpets and DIY products. However, a number of non-bulky outlets have opened in Valley Retail Park and Valley Park Leisure Park in particular.

1.5 Retailers in this location include Marks and Spencer and Boots the Chemist. In addition, recognised High Street retailers selling shoes, sports wear and fashion clothing are present, including: TK Maxx, Topshop, Monsoon and Next. Valley Park Leisure Park also contains a number of leisure uses, including a multi-screen cinema and fast-food and sit-down restaurants. Trafalgar Way Retail Park contains a Sainsbury food superstore.

1.6 The range of bulky goods sold within Croydon's retail parks generally reflects the pattern of out-of-centre retail development that has emerged over the past 20 years or so.

1.7 Within the Borough there are also some free-standing retail warehouses selling comparison and convenience goods. Like the retail parks, this type of retail format often generates separate shopping trips.

Appendix 4 – Zone Demographic Structure

Introduction

For the purpose of examining existing shopping patterns and forecasting shopping potential within the Borough's town, district and local centres, we have devised catchment zones, which in broad terms reflect the catchments of the Borough's town and district centres. Using data from MapInfo Local Area Reports (2005 information), we describe below the key demographic characteristics of the six Zones individually, identifying in particular age, social economic grade, tenure, economic activity and car ownership.

1. Zone 1 North

1.1 Zone 1 includes the northern part of the Borough and the neighbouring areas of Lambeth and Bromley. The Zone is made up of shopping facilities with overlapping catchment areas, for which the Borough administrative boundary has limited relevance. It includes two of the Borough's town centres, Norbury and Thornton Heath, and two of the district centres, Upper Norwood and South Norwood, as well as Pollards Hill and Thornton Heath Ponds local centres.

1.2 It is important also to note that Zone 1 includes some shopping facilities located outside the Borough, the largest of which is Sainsbury Streatham.

Demographic Profile

Population Structure

1.3 According to MapInfo population statistics, Zone 1 had an estimated resident population of 154,214 in 2005. This reflected an increase of some 3,929 individuals since the 2001 Census. The statistics also confirm that in 2005, there were approximately 64,176 private households falling within the zone. In 2005, the average household occupancy rate was therefore 2.4 persons. The 2005 demographics demonstrate that at 22.24%, the percentage of Zone 1s population aged 0-15 exceeded the national average of 19.25%. The percentage of working-age adults also slightly exceeds the national average (64.89% to a national average of 61.99%). However, the percentage of the population who were of retirement age, at 12.88%, fell distinctly below the national benchmark of 18.76%.

Economic Activity (16 - 74)

1.4 The number of economically active individuals in Zone 1 at the time of the 2001 Census was 74,800, which at 76.98% of the total number of persons of working age, was marginally greater that the national average of 76.00%. However, the unemployment rate of 7.07% was higher than the national average of 5.22%.

Occupation (Approximated Social Grade)

1.5 2001 Census data suggests that the approximated social grade by occupation varies slightly from UK averages. C1 supervisory/clerical/junior manager/admin/professional occupations represented the dominant occupational group in Zone 1. At 36.92%, this was higher than the national average of 29.56%. The number of people in AB Occupations was roughly equivalent to the national average (24.19% to a national average of 24.89%). The percentage of C2 and D grade occupations fell some way below the national average. However, the percentage of individuals in category E is marginally greater than the national average, with 6.83% of individuals on state benefit, unemployed or on the lowest pay grades, in comparison with 6.75% nationally.

Household and Family Cars

1.6 In Zone 1, the percentage of householders with no car or van markedly exceeded the national average in 2001 with 34.37% of homes with no vehicle in comparison with the national average of 27.47%. However, 46.93% of homes (compared with a national average of 43.75%) had 1 car or van. The number of households in possession of 2, 3 or 4+ vehicles consistently fell below the national average. This indicated that residents in this part of the Borough are more reliant on public transport than would usually be the case

Housing Tenure

1.7 64.93% of homes in Zone 1 are owner-occupied. This falls a little below the national average of 68.86%. Social rented housing comprises some 18.16% of total households; approximately 1% below the national benchmark. The greatest different between Zone 1 and national percentages is with private rented accommodation. 15.51% of households in Zone 1 are rented privately, in comparison with 9.89% nationally.

2. Zone 2 Central

2.1 Zone 2 covers the central part of the Borough on either side of the metropolitan centre, and also includes limited areas of Sutton and Merton Borough in the west and Bromley Borough in the east.

Demographic Profile

Population profile

2.2 In 2005, Zone 2 had a total population of 123,394. When compared with the 2001 Census Data, this represented an increase of 3,865 in the total population. 2005 estimates show that there were 53,447 private households in Zone 2. This indicates a mean household occupancy rate of 2.3. The population demographic conformed broadly with the national mean. However, the percentage of people of retirement age was approximately 4% lower than the national average, with a greater proportion of individuals of working age.

Economic activity

2.3 There is a high level of economic activity in this zone. The 2001 Census shows that almost 79% of the working age population was economically active. This slightly exceeded the average for the UK, 76%. At 5.78%, the level of unemployment slightly exceeds the national average of 5.22%.

Occupation

2.4 With regards to occupation, the greatest deviation from the national average was in grade C1, with figures for Zone 2 exceeding national figures by 6.64%. In other categories, the UK and Zone 2 figures varied much less. It is worth noting, however, that AB and C1 are by far the most dominant sectors, with C2, D and E all falling below the national average.

Household and family cars

2.5 Zone 2 also displayed low vehicle ownership, with the percentage of the population with one or fewer vehicles slightly higher than the national average. The percentage of households with 2 or more cars or vans fell well below national figures.

Housing tenure

2.6 A large percentage of all households in Zone 2 were owner occupied. However, at 64.27%, this was some 4.5% lower than the national average (68.86%). At 63.92%, the percentage of dwellings owned with a mortgage or loan exceeded the mean national percentage by circa 9%. The percentage of socially rented dwellings matched the national average almost exactly. However, the percentage of private rented accommodation, at 14.95%, was higher than the national average (9.89%).

3. Zone 3 Coulsdon

3.1 Zone 3 covers the area from which Coulsdon is judged to draw most strongly.

Demographic Profile

Population profile

3.2 According to 2005 MapInfo population estimates, the population of Zone 3 was 28,225. There were 10,842 private households. This equates to an average of 2.6 persons per household. This demographic broadly conforms to the national average, and in none of the categories do the Coulsdon figures deviate more than 2% from the national average percentages.

Economic activity

3.3 According to statistics from the 2001 National Census, there is a high rate of economic activity in the Zone, with 80.59% of the working population identified as economically active. In 2001, the unemployment rate was significantly lower than the national average of 5.22%.

Occupation

3.4 Of the working population of Zone 3, roughly equal proportions of the workforce hold AB (34.86%) and C1 (34.98%) professional jobs. These figures both significantly exceed the national averages. However, the percentage of the population in C2, D and E grade occupations is much lower than national averages, with both D (11.94%) and E (3.44%) representing approximately half of the national averages.

Household and family cars

3.5 Census vehicle ownership statistics demonstrate that the percentage of Zone 3 residents with no car (15.06%) fell a long way short of the national average in 2001 (27.47%). The greatest proportion of households own just 1 vehicle, with 40.87% of householders owning 1 van or car, compared with a national average of 43.75%. The number of households with 2, 3, 4 or more vehicles exceeded the national averages, suggesting high vehicle ownership across Zone 3.

Housing tenure

3.6 The survey data indicates that most of households in Zone 3 are owner occupied (84%). This exceeds the national average (68.86%) by over 15%. At 10%, the percentage of socially rented dwellings in the Zone fell significantly below the national average of 19.19%. The proportion of privately rented accommodation is similarly low, which at 5% is around half the national average.

4. Zone 4 - Purley

4.1 Zone 4 covers the area from which Purley is judged to draw most strongly.

Demographic Profile

Population profile

4.2 Based on MapInfo 2005 population estimates, the population of Zone 4 was 52,035. There were 21,135 households, which equated to 2.5 persons per household. The demographic of Zone 4 conformed almost exactly to the national profile, and in none of the population categories did the Zone 4 and national percentages deviate by more than 2%. The greatest difference was with the retired population, which at 16.76% for Zone 4 falls 2% below the national average of 18.76%.

Economic activity

4.3 2001 Census data demonstrates that the Zone 4 population is very economically active, with 78.76% of the population identified as economically active. At 4.11%, the unemployment rate falls slightly below the national average of 5.22%.

Occupation

4.4 The majority of workers in Zone 4 hold AB (35.92%) or C1 (36.86%) professions, for which both sectors exceed the national averages of 24.89% and 29.56% respectively. However, the percentage of individuals in C2 (11.91%), D (11.39%) and E (3.91%) grade professions is around half of the 2001 national averages.

Household and family cars

4.5 Car ownership in Zone 4 is higher than in other parts of the Borough. In 2005, the percentage of the population of Zone 4 with no vehicle (22.24%) was much lower than the national average of 27.47%. At 43.72%, the greatest proportion of households owned 1 car. This is roughly equivalent to the national average of 43.75%. The percentages of households with 2, 3 or 4+ vehicles all exceeded the national averages.

Housing tenure

4.6 In 2005, 74.10% of households in Zone 4 were owner-occupied. This exceeded the national average by approximately 6%. The percentage of socially rented accommodation, at 14.64%, fell some way below the national average of 19.19%. The percentage of private rented accommodation for Zone 4 broadly accords with the national average of 9.89%.

5. Zone 5 Selsdon

5.1 Zone 5 covers the area from which Selsdon is judged to draw most strongly.

Demographic Profile

Population profile

5.2 The population of Zone 5 in 2005 was 47,155, with 19,051 households. This results in an average household occupancy of 2.5 persons. The demographic profile of Zone 5 aligns with the national averages almost exactly, with a maximum deviation of just 1% in any category.

Economic activity

5.3 Statistics from the 2001 UK Census suggest that in Zone 5 a higher than average percentage of the population are economically active (79.57%). At 3,53%, the level of unemployment is below the national average of 5.22%.

Occupation

5.4 A high percentage of workers in Zone 5 were employed in AB (34.26%) or C1 (36.89%) related jobs. These are approximately 10% and 7% respectively above the national average. However, the level of people in C2 (13.43%), D (11.13%) and E (4.28%) professions was much lower than the national averages.

Household and family cars

5.5 There is a high level of vehicle ownership in Zone 5. In 2005, a low percentage of households did not own any vehicle in Zone 5. At 18.66%, this is some way below the national average of 27.47%. In all other categories, the percentages for Zone 5 exceeded the national benchmark, with the greatest proportion of households owning 1 or 2 vehicles.

Housing tenure

5.6 A high percentage of homes in Zone 5 are owner occupied (79.15%). This compares to a national average of 68.86%. The percentage of socially rented properties, at 11.55%, falls well below the national average of 19.19%. At 8.30%, the percentage of privately rented properties was marginally less than the national figure of 9.89%.

6. Zone 6 New Addington

6.1 Zone 6 is the smallest of the zones covering the New Addington housing area only served by New Addington district centre.

Demographic Profile

Population profile

6.2 MapInfo population updates show that the usually resident population of Zone 6 in 2005 was 17,244. There were 6,502 private households. This resulted in an average household occupancy of 2.7 persons. The data shows that the population of Zone 6 is quite young, with 28.92% of the population aged below 15 years, compared with a national average of 19.25%. Figures for both of the other categories for Zone 6 fell some way short of the national averages.

Economic activity

6.3 Zone 6 displays a low level of economic activity when compared to the national average. 69.16% of individuals of working age were economically active, compared with a national benchmark of 76%. At 8.07%, the percentage of unemployed individuals exceeded the national average (5.22%) by some way.

Occupation

6.4 On the whole, the workforce of Zone 6 is involved in low social grade occupations. Just 12.41% of the resident population held positions in AB grade jobs, compared with the national average of 24.89%. It is particularly notable that the proportion of the population identified as social grade E (10.64%), exceeded the national average (6.75%) by some way.

Household and family cars

6.5 The statistics provided for Zone 6 demonstrate that there is low car ownership amongst residents of New Addington. Almost 80% of households had 0 or 1 car, with the percentage of households with greater than 1 car falling significantly below the national average.

Housing tenure

6.6 Just 49.28% of dwellings in Zone 6 were owner occupied (compared with a national average of 68.86%). A very high proportion (45,68%) of dwellings were social rented, which significantly exceeds the national average of 19.19%. There was a very low percentage of privately rented accommodation.

Appendix 5 – Zone Population and Expenditure Projections

Table 1: Population estimates and projections

	2005	2010	2015	2020	2025
Zone 1					
1a - Norbury	51,252	53,291	53,977	55,065	56,455.24
1b - Upper Norwood	26,199	27,345	27,421	27,865	28,568.45
1c - Thornton Heath	44,487	46,754	47,081	47,920	49,129.70
1d - South Norwood	32,276	34,210	34,507	35,141	36,028.24
Zone 1 total	154,214	161,600	162,986	165,990	170,181.62
Zone 2					
2a - Central Croydon West	65,303	68,839	69,765	71,187	72,984.78
2b - Central Croydon East	58,091	61,123	61,558	62,660	64,241.81
Zone 2 total	123,394	129,962	131,323	133,847	137,226.59
Zone 3 total	28,225	29,894	30,838	31,684	32,483.59
Zone 4 total	52,035	55,323	56,540	57,885	59,346.32
Zone 5 total	47,155	49,082	49,211	50,007	51,269.39
Zone 6 total	17,244	17,791	17,797	18,070	18,526.67
Study Area Total	**422,267**	**443,652**	**448,695**	**457,482**	**469,034**

	2005-10	2005-15	2005-20	2005-25
Total population change	21,385	26,428	35,215	46,767
Total population change (%)	5.06%	6.26%	8.34%	11.08%

Source/Notes:
(a) MapInfo Retail Reach reports, generated for Drivers Jonas in October 2008.
(b) Estimates for 2020 and 2025 have been derived by growing the 2017 projections by a rate of +0.5% per annum (DJ estimate).

Table 2a: Average convenience expenditure per head estimates and projections (£)

	2005	2010	2015	2020	2025
Zone 1	1,642	1,624	1,661	1,690	1,712
Zone 2	1,646	1,628	1,665	1,694	1,716
Zone 3	1,693	1,675	1,712	1,742	1,765
Zone 4	1,707	1,688	1,726	1,756	1,779
Zone 5	1,671	1,652	1,690	1,719	1,742
Zone 6	1,356	1,342	1,372	1,395	1,414

Source/Notes:
(a) 2005 expenditure per head estimates have been provided for each Zone by MapInfo.
(b) Convenience growth rate taken from Experian's Retail Planning Briefing Note November 2007 Table 3.1 (recommended ultra long-term trend, +0.6%pa).
(c) Excludes Retail Sales Not in Stores and Internet trading. The following deductions have been made consistent with Experian's Retail Planning Briefing Note November 2007, Table 5.1: 2.7% at 2005; 3.6% at 2006; 4.8% at 2007; 5.6% at 2008; 6.1% at 2009; 6.6% at 2010; 7.3% at 2015. DJ has estimated that this will increase to 10.0% by 2025.

Table 2b: Average comparison expenditure per head estimates and projections (£)

	2005	2010	2015	2,020	2,025
Zone 1	2,749	3,264	4,088	5,167	6,533
Zone 2	2,759	3,276	4,103	5,186	6,557
Zone 3	2,906	3,450	4,322	5,463	6,906
Zone 4	2,923	3,470	4,346	5,494	6,946
Zone 5	2,842	3,374	4,226	5,342	6,753
Zone 6	2,123	2,521	3,157	3,991	5,046

Source/Notes:
(a) 2005 expenditure per head estimates have been provided for each Zone by MapInfo.
(b) Comparison growth rate taken from Retail Planning Briefing Note November 2007 Table 3.1 (recommended ultra long-term trend, +4.8%pa).
(c) Excludes Retail Sales Not in Stores and Internet trading. The following deductions have been made consistent with Experian's Retail Planning Briefing Note November 2007, Table 5.1: 8.0% at 2005; 8.8% at 2006; 11.0% at 2007; 12.1% at 2008; 13.6% at 2010; 14.4% for 2015. DJ has estimated that this will increase to 15.5% by 2020 and 16.5% by 2025.

Table 3a: Total available convenience expenditure estimates and forecasts - main food shopping trips (£m)

	2005	2010	2015	2020	2025
Zone 1					
1a - Norbury	58.92	60.60	62.77	65.12	67.67
1b - Upper Norwood	30.12	31.09	31.89	32.95	34.24
1c - Thornton Heath	51.15	53.17	54.75	56.67	58.89
1d - South Norwood	37.11	38.90	40.13	41.56	43.18
Zone 1 total	177.30	183.76	189.53	196.31	203.98
Zone 2					
2a - Central Croydon West	75.26	78.46	81.32	84.39	87.69
2b - Central Croydon East	66.95	69.67	71.75	74.28	77.18
Zone 2 total	142.20	148.13	153.07	158.67	164.87
Zone 3 total	33.45	35.04	36.97	38.63	40.13
Zone 4 total	62.16	65.37	68.32	71.13	73.91
Zone 5 total	55.15	56.77	58.21	60.16	62.51
Zone 6 total	16.37	16.71	17.09	17.65	18.34
Study Area Total	**486.63**	**505.78**	**523.19**	**542.55**	**563.74**

Source/Notes:
(a) Tables 1 and 2a.
(b) It has been assumed that 70% of shoppers' total available convenience expenditure is spent on main food shopping trips.

Table 3b: Total available comparison expenditure estimates and forecasts (£m)

	2005	2010	2015	2020	2025
Zone 1					
1a - Norbury	140.89	173.92	220.64	284.54	368.79
1b - Upper Norwood	72.02	89.24	112.09	143.99	186.62
1c - Thornton Heath	122.29	152.59	192.45	247.62	320.94
1d - South Norwood	88.73	111.65	141.05	181.59	235.35
Zone 1 total	423.93	527.40	666.22	857.74	1111.71
Zone 2					
2a - Central Croydon West	180.18	225.49	286.22	369.21	478.53
2b - Central Croydon East	160.28	200.22	252.55	324.98	421.21
Zone 2 total	340.45	425.71	538.77	694.19	899.73
Zone 3 total	82.03	103.15	133.27	173.09	224.34
Zone 4 total	152.09	191.97	245.73	318.03	412.20
Zone 5 total	134.01	165.60	207.95	267.14	346.24
Zone 6 total	36.62	44.85	56.19	72.13	93.48
Study Area Total	**1,169.13**	**1,458.68**	**1,848.13**	**2,382.32**	**3,087.71**

Source/Notes:
(a) Tables 1 and 2b.

Table 4a: Growth in available expenditure for main food shopping trips

	2005-2010	2005-2015	2005-2020	2005-2025
Zone 1				
1a - Norbury	1.67	3.84	6.20	8.74
1b - Upper Norwood	0.97	1.77	2.83	4.12
1c - Thornton Heath	2.02	3.60	5.53	7.74
1d - South Norwood	1.79	3.02	4.45	6.08
Zone 1 total (£m)	**6.46**	**12.23**	**19.01**	**26.68**
Zone 1 total (%)	**3.64%**	**6.90%**	**10.72%**	**15.05%**
Zone 2				
2a - Central Croydon West	3.21	6.06	9.13	12.43
2b - Central Croydon East	2.72	4.81	7.34	10.24
Zone 2 total (£m)	**5.93**	**10.87**	**16.47**	**22.67**
Zone 2 total (%)	**4.17%**	**7.64%**	**11.58%**	**15.94%**
Zone 3 total (£m)	**1.59**	**3.52**	**5.18**	**6.68**
Zone 3 total (%)	**4.75%**	**10.51%**	**15.47%**	**19.98%**
Zone 4 total (£m)	**3.21**	**6.16**	**8.97**	**11.75**
Zone 4 total (%)	**5.16%**	**9.90%**	**14.43%**	**18.90%**
Zone 5 total (£m)	**1.63**	**3.06**	**5.01**	**7.36**
Zone 5 total (%)	**2.95%**	**5.56%**	**9.09%**	**13.35%**
Zone 6 total (£m)	**0.33**	**0.72**	**1.28**	**1.97**
Zone 6 total (%)	**2.04%**	**4.39%**	**7.80%**	**12.01%**
Study Area Total (£m)	**19.15**	**36.56**	**55.92**	**77.11**
Study Area Total (%)	**3.93%**	**7.51%**	**11.49%**	**15.85%**

Source/Notes:
(a) Table 3a.

Table 4b: Growth in available expenditure for comparison goods shopping trips

	2005-10	2005-15	2005-2020	2005-2025
Zone 1				
1a - Norbury	33.03	79.75	143.65	227.90
1b - Upper Norwood	17.23	40.07	71.97	114.60
1c - Thornton Heath	30.30	70.16	125.33	198.65
1d - South Norwood	22.92	52.32	92.86	146.63
Zone 1 total (£m)	**103.47**	**242.29**	**433.81**	**687.78**
Zone 1 total (%)	**24.41%**	**57.15%**	**102.33%**	**162.24%**
Zone 2				
2a - Central Croydon West	45.32	106.04	189.03	298.35
2b - Central Croydon East	39.94	92.27	164.70	260.93
Zone 2 total (£m)	**85.26**	**198.32**	**353.73**	**559.28**
Zone 2 total (%)	**25.04%**	**58.25%**	**103.90%**	**164.27%**
Zone 3 total (£m)	**16.84**	**46.96**	**86.79**	**138.04**
Zone 3 total (%)	**20.53%**	**57.25%**	**105.80%**	**168.28%**
Zone 4 total (£m)	**39.88**	**93.64**	**165.94**	**260.11**
Zone 4 total (%)	**26.22%**	**61.57%**	**109.11%**	**171.03%**
Zone 5 total (£m)	**31.59**	**73.94**	**133.13**	**212.23**
Zone 5 total (%)	**23.57%**	**55.18%**	**99.34%**	**158.37%**
Zone 6 total (£m)	**8.23**	**19.58**	**35.51**	**56.87**
Zone 6 total (%)	**22.49%**	**53.46%**	**96.99%**	**155.31%**
Study Area Total (£m)	**289.56**	**679.01**	**1213.20**	**1918.59**
Study Area Total (%)	**24.77%**	**58.08%**	**103.77%**	**164.10%**

Source/Notes:
(a) Table 3b.

Appendix 6 – Centre Market Shares and Expenditure Potential

Zone 1a Norbury

Table 5a - Convenience Expenditure Market Shares - main food trips at 2005

	Total Zone 1a main food available expenditure (£m)	Market share of Zone 1a main food expenditure (%)	Stores' turnover derived from Zone 1a residents (£m)	Inflow to store from beyond Zone 1a (%)	Inflow to store from beyond Zone 1a (£m)	Survey derived turnover (£m)
	58.92					
Store name						
Co-op Streatham		0.44%	0.26	48.70%	0.25	0.51
Iceland Norbury		3.45%	2.03	10.42%	0.24	2.27
Sainsbury's Streatham		32.80%	19.33	45.00%	15.81	35.14
Somerfield Norbury		2.69%	1.59	60.37%	2.41	4.00
Tesco 1076 London Road		4.24%	2.50	17.37%	0.53	3.02
Total	**58.92**	**44%**	**25.70**		**19.24**	**44.94**
Leakage						
Tesco Thornton Heath		7.77%	4.58			
Purley Way Retail Parks		33.39%	19.67			
Croydon Metropolitan Centre		1.23%	0.72			
Total		**86.01%**	**50.68**			

Source/Notes:

1 Total main food available expenditure for Zone 1a has been taken from Table 3a.
2 Market shares of Zone 1a total available main food expenditure for each store have been provided by Retail Reach MapInfo.
3 Estimates of inflow of expenditure to each store from beyond Zone 1a have been provided by Retail Reach MapInfo.
4 Inflow to store from beyond Zone 1a estimates are expressed as percentages of each store's total turnover.
5 Total store turnover is the sum of the stores' turnover derived from Zone 1a residents plus inflow.

Table 5b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Co-op Streatham	203	133	£5,599	0.74	0.52	-0.01
Iceland Norbury	446	333	£5,498	1.83	1.28	0.99
Sainsbury's Streatham	6,562	3,120	£9,461	29.52	26.57	8.57
Somerfield Norbury	966	629	£7,091	4.46	3.12	0.88
Tesco 1076 London Road	195	100	£12,442	1.24	0.87	2.15
Total	**8,372**	**4,315**		**37.79**	**32.36**	**12.58**

Source/Notes:

1 Total gross floorspace figures have been provided by LB Croydon.
2 The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.
3 Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.
4 Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.
5 Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.
6 Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo and 70% of company benchmark turnovers.

Table 5c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	44.94			46.22		1.28	47.16		2.22	48.19		3.25	49.30		4.36
Benchmark Turnover (£m)		32.36			32.85	0.49		33.34	0.98		33.85	1.49		34.36	2.00
Expenditure growth surplus (£m)			**0.00**			**0.79**			**1.24**			**1.76**			**2.36**
Base Date Overtrading (£m)			12.58			12.58			12.58			12.58			12.58
Potential expenditure surplus (£m)			**12.58**			**13.37**			**13.82**			**14.34**			**14.94**

Source/Notes:
1 Store turnover assumes a constant market share (44%) and inflow.
2 Base date overtrading assumes a constant market share.

Table 5d - Comparison Expenditure Distribution

Centre name	Total Zone 1a comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 1a comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015	Total Zone 1a comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025
Norbury	140.89	4,487	3,365	10.10	7%	220.64	15.81	**5.71**	368.79	26.43	**16.33**

Source/Notes:

1 *Total available comparison expenditure for Zone 1a has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 1b Upper Norwood

Table 6a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 1b main food available expenditure (£m)	Market share of Zone 1b main food expenditure (%)	Stores' turnover derived from Zone 1b residents (£m)	Inflow to store from beyond Zone 1b (%)	Inflow to store from beyond Zone 1b (£m)	Survey derived turnover (£m)
	30.12					
Budgens Upper Norwood		1.68%	0.51	49.11%	0.49	0.99
Tesco Crystal Palace		7.65%	2.30	43.08%	1.74	4.05
Total	**30.12**	**9%**	**2.81**		**2.23**	**5.04**
Leakage						
Sainsbury's Streatham		5.77%	1.74			
Sainsbury's Selhurst Park		22.46%	6.77			
Tesco Thornton Heath		10.06%	3.03			
Purley Way Retail Parks		12.41%	3.74			
Croydon Metropolitan Centre		0.42%	0.13			
Total		**60.45%**	**18.21**			

Source/Notes:
1 *Total main food available expenditure for Zone 1b has been taken from Table 3a.*
2 *Market shares of Zone 1b total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 1b have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 1b estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 1b residents plus inflow.*

Table 6b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Budgens Upper Norwood	200	130	5434	0.71	0.49	0.50
Tesco Crystal Palace	310	159	12442	1.98	1.38	2.67
Total	**510**	**289**		**2.68**	**1.88**	**3.17**

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach Mapinfo model and 70% of company benchmark turnovers.*
7 *Budgens Upper Norwood Floorspace - DJ Estimate*

Table 6c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	5.04			5.21		0.16	5.34		0.30	5.52		0.47	5.73		0.69
Benchmark Turnover (£m)		1.88			1.91	0.03		1.93	0.06		1.96	0.09		1.99	0.12
Expenditure growth surplus (£m)			**0.00**			**0.13**			**0.24**			**0.39**			**0.57**

Source/Notes:
1 *Store turnover assumes a constant market share (9%) and inflow.*
2 *Base date overtrading assumes a constant market share.*

Table 6d - Commitments at 2010

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Main food trips benchmark turnover from Zone 1b (£m)
Sainsbury Upper Norwood	3,782	2,647	9,461	25.05	20.04	12.02

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices and grown at +0.3% pa.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Sainsbury's assumed to draw 60% of trade from within Zone 1b.*

Table 6e - Convenience Expenditure Growth Potential including commitments at forecast dates - main food only

	2010	2015	2020	2025
Benchmark turnover of existing stores within centre	0.50	0.51	0.52	0.53
Turnover of Commitments				
Sainsbury's	12.02	12.20	12.39	12.57
Total turnover	12.52	12.71	12.91	13.10
Combined market share of Zone 1b expenditure	40%	40%	39%	38%

Table 6f - Comparison Expenditure Distribution

Centre name	Total Zone 1b comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 1b comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 1b comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
Upper Norwood	72.02	5,126	3,845	11.53	16%	112.09	17.95	**6.42**	186.62	29.89	**18.35**

Source/Notes:

1 *Total available comparison expenditure for Zone 1b has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 1c Thornton Heath

Table 7a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 1c main food available expenditure (£m)	Market share of Zone 1c main food expenditure (%)	Stores' turnover derived from Zone 1c residents (£m)	Inflow to store from beyond Zone 1c (%)	Inflow to store from beyond Zone 1c (£m)	Survey derived turnover (£m)
	51.15					
Iceland Thornton Heath		2.31%	1.18	55.52%	1.47	2.66
Tesco Thornton Heath		56.47%	28.88	49.70%	28.54	57.42
Lidl Thornton Heath Pond		2.01%	1.03	33.99%	0.53	1.56
Tesco Thornton Heath Pond (847)		2.49%	1.27	34.74%	0.68	1.95
Total	**51.15**	**63%**	**32.37**		**31.22**	**63.59**
Leakage						
Sainsbury's Selhurst Park		6.27%	3.21			
Sainsbury's Streatham		2.06%	1.05			
Croydon Metropolitan Centre		1.56%	0.80			
Purley Way Retail Parks		21.64%	11.07			
Total		**94.81%**	**48.49**			

Source/Notes:
1 *Total main food available expenditure for Zone 1c has been taken from Table 3a.*
2 *Market shares of Zone 1c total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 1c have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 1c estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 1c residents plus inflow.*

Table 7b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Iceland Thornton Heath	954	712	5,498	3.92	2.74	-0.09
Tesco Thornton Heath	6,170	2,567	12,442	31.94	28.75	28.67
Lidl Thornton Heath Pond	1,412	767	3,491	2.68	2.14	-0.58
Tesco Thornton Heath Pond (847)	239	122	12,442	1.52	1.07	0.89
Total	**8,775**	**4,169**		**40.06**	**34.69**	**28.89**

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.*

Table 7c - Convenience Expenditure Growth Potential - main food trips at forecast dates

		2005			2010			2015			2020			2025	
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	63.59			66.09		2.51	68.06		4.48	70.46		6.87	73.21		9.62
Benchmark Turnover (£m)		34.69			35.22	0.52		35.75	1.06		36.29	1.59		36.84	2.14
Expenditure growth surplus (£m)			**0.00**			**1.99**			**3.42**			**5.28**			**7.48**
Base Date Overtrading (£m)			28.89			28.89			28.89			28.89			13.00
Potential expenditure surplus (£m)			**28.89**			**30.88**			**32.31**			**34.17**			**20.48**

Source/Notes:
1 Store turnover assumes a constant market share (63%) and inflow.
2 Base date overtrading assumes a constant market share.

Table 7d - Comparison Expenditure Distribution

Centre name	Total Zone 1c comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 1c comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 1c comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
Thornton Heath	122.29	4,867	3,650	10.95	9%	192.45	17.23	**6.28**	320.94	28.74	**17.79**

Source/Notes:

1 *Total available comparison expenditure for Zone 1c has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 1d South Norwood

Table 8a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 1d main food available expenditure (£m)	Market share of Zone 1d main food expenditure (%)	Stores' turnover derived from Zone 1d residents (£m)	Inflow to store from beyond Zone 1d (%)	Inflow to store from beyond Zone 1d (£m)	Survey derived turnover (£m)
	37.11					
Sainsbury's Selhurst Park		16.75%	6.22	71.54%	15.62	21.84
Somefield South Norwood		7.39%	2.74	10.82%	0.33	3.08
Total	**37.11**	**24%**	**8.96**		**15.96**	**24.91**
Leakage						
Sainsbury's Streatham		0.27%	0.10			
Tesco Thornton Heath		17.01%	6.31			
Croydon Metropolitan Centre		3.83%	1.42			
Purley Way Retail Parks		20.37%	7.56			
Total		**65.62%**	**24.35**			

Source/Notes:
1 Total main food available expenditure for Zone 1d has been taken from Table 3a.
2 Market shares of Zone 1d total available main food expenditure for each store have been provided by Retail Reach MapInfo.
3 Estimates of inflow of expenditure to each store from beyond Zone 1d have been provided by Retail Reach MapInfo.
4 Inflow to store from beyond Zone 1d estimates are expressed as percentages of each store's total turnover.
5 Total store turnover is the sum of the stores' turnover derived from Zone 1d residents plus inflow.

Table 8b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Sainsbury's Selhurst Park	6,627	3,151	9,461	29.81	26.83	-4.99
Somefield South Norwood	1,916	1,092	7,091	7.74	6.19	-3.12
Total	**8,543**	**4,243**		**37.55**	**33.02**	**-8.11**

Source/Notes:
1 Total gross floorspace figures have been provided by LB Croydon.
2 The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.
3 Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.
4 Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.
5 Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.
6 Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.

Table 8c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	24.91		-	26.12		1.20	26.94		2.03	27.90		2.99	28.99		4.08
Benchmark Turnover (£m)		33.02	-		33.52	0.50		34.03	1.00		34.54	1.52		35.06	2.04
Expenditure growth surplus (£m)			**0.00**			**0.71**			**1.02**			**1.47**			**2.04**
Base Date Overtrading (£m)			-8.11			-8.11			-8.11			-8.11			-8.11
Potential expenditure surplus (£m)			**-8.11**			**-7.40**			**-7.08**			**-6.64**			**-6.07**

Source/Notes:
1 Store turnover assumes a constant market share (24%) and inflow.
2 Base date overtrading assumes a constant market share.

Table 8d - Comparison Expenditure Distribution

Centre name	Total Zone 1d comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 1d comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 1d comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
South Norwood	88.73	2,486	1,865	5.59	6%	141.05	8.89	**3.30**	235.35	14.84	**9.24**

Source/Notes:

1 *Total available comparison expenditure for Zone 1d has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 2a Central Croydon West

Table 9a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 2a main food available expenditure (£m)	Market share of Zone 2a main food expenditure (%)	Stores' turnover derived from Zone 2a residents (£m)	Inflow to store from beyond Zone 2a (%)	Inflow to store from beyond Zone 2a (£m)	Survey derived turnover (£m)
	75.26					
Asda Purley Way		25.23%	18.99	73.52%	52.72	71.70
Iceland (Croydon MC)		3.33%	2.51	70.28%	5.93	8.43
Lidl Croydon (Broad Green)		1.84%	1.38	51.61%	1.48	2.86
Marks and Spencer (Croydon)		0.95%	0.71	78.00%	2.53	3.25
Marks and Spencer (Valley Park RP)		0.20%	0.15	79.05%	0.57	0.72
Sainsbury's Whitgift Centre		8.22%	6.19	60.45%	9.46	15.64
Sainbury's Purley Way		18.77%	14.13	63.06%	24.11	38.24
Sainsbury's Wallington		6.91%	5.20	82.70%	24.86	30.06
Somerfield (Croydon)		0.88%	0.66	74.81%	1.97	2.63
Tesco (Croydon)		6.76%	5.09	36.19%	2.89	7.97
Total	**75.26**	**73%**	**55.00**		**126.50**	**181.51**
Leakage						
Tesco Thonton Heath		12%	9.00			
Total		**85.04%**	**64.00**			

Source/Notes:

1 Total main food available expenditure for Zone 2a has been taken from Table 3a.
2 Market shares of Zone 2a total available main food expenditure for each store have been provided by Retail Reach MapInfo.
3 Estimates of inflow of expenditure to each store from beyond Zone 2a have been provided by Retail Reach MapInfo.
4 Inflow to store from beyond Zone 2a estimates are expressed as percentages of each store's total turnover.
5 Total store turnover is the sum of the stores' turnover derived from Zone 2a residents plus inflow.

Table 9b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Asda Purley Way	7,856	2,782	12,483	34.73	31.25	40.45
Iceland (Croydon MC)	821	613	5,498	3.37	2.36	6.07
Lidl Croydon (Broad Green)	1,228	667	3,491	2.33	1.86	1.00
Marks and Spencer (Croydon)	2,607	1,702	10,987	18.69	14.96	-11.71
Marks and Spencer (Valley Park RP)	828	618	10,987	6.79	4.75	-4.03
Sainsbury's Whitgift Centre	3,812	1,952	9,461	18.47	14.77	0.87
Sainbury's Purley Way	7,432	3,534	9,461	33.43	30.09	8.15
Sainsbury's Wallington	5,299	2,520	9,461	23.84	21.45	8.61
Somerfield (Croydon)	2,019	1,150	7,091	8.16	6.53	-3.90
Tesco (Croydon)	232	119	12,442	1.48	1.03	6.94
Total	**32,134**	**15,656**		**151.28**	**129.06**	**52.45**

Source/Notes:

1 Total gross floorspace figures have been provided by LB Croydon.
2 The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.
3 Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.
4 Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.
5 Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.
6 Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.

Table 9c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	181.51			189.24		7.74	196.13		14.62	203.54		22.03	211.49		29.98
Benchmark Turnover (£m)		129.06			131.01	1.95		132.98	3.92		134.99	5.93		137.03	7.97
Expenditure growth surplus (£m)			**0.00**			**5.79**			**10.70**			**16.10**			**22.01**
Base Date Overtrading (£m)			52.45			52.45			52.45			52.45			52.45
Potential expenditure surplus (£m)			**52.45**			**58.24**			**63.15**			**68.55**			**74.46**

Source/Notes:
1 Store turnover assumes a constant market share (73%) and inflow.
2 Base date overtrading assumes a constant market share.

Zone 2b Central Croydon East

Table 10a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 2b main food available expenditure (£m)	Market share of Zone 2b main food expenditure (%)	Stores' turnover derived from Zone 2b residents (£m)	Inflow to store from beyond Zone 2b (%)	Inflow to store from beyond Zone 2b (£m)	Survey derived turnover (£m)
	66.95					
Budgens Addiscombe		0.73%	0.49	74.53%	1.43	1.92
Co-op Addiscombe		2.26%	1.51	24.61%	0.49	2.01
Tesco (Lower Addiscombe Road)		5.74%	3.84	25.98%	1.35	5.19
Tesco Shirley (23 Shirley Road)		3.76%	2.52	33.96%	1.29	3.81
Tesco Shirley (Bywood Avenue)		4.42%	2.96	74.00%	8.42	11.38
Total	**66.95**	**17%**	**11.32**		**12.99**	**24.31**
Leakage						
Asda Croydon (Marlowe Way)		6.22%	4.16			
Co-op Croydon		1.29%	0.86			
Iceland Croydon		2.27%	1.52			
Lidl Croydon (Broad Green)		0.45%	0.30			
Marks and Spencer Croydon)		1.00%	0.67			
Sainsbury's Whitgift Centre		9.02%	6.04			
Sainsbury's Purley Way		6.77%	4.53			
Sainsbury's Wallington		0.15%	0.10			
Somerfield Croydon (George Street)		2.13%	1.43			
Tesco Croydon (Whitehorse Road)		0.39%	0.26			
Tesco Thornton Heath		2.85%	1.91			
Somerfield South Norwood		0.23%	0.15			
Total		**49.68%**	**33.26**			

Source/Notes:

1 *Total main food available expenditure for Zone 2b has been taken from Table 3a.*
2 *Market shares of Zone 2b total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 2b have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 2b estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 2b residents plus inflow.*

Table 10b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Budgens Addiscombe	155	101	5,434	0.55	0.38	1.54
Co-op Addiscombe	492	321	5,599	1.80	1.26	0.75
Tesco (Lower Addiscombe Road)	296	152	12,442	1.89	1.32	3.87
Tesco Shirley (23 Shirley Road)	286	146	12,442	1.82	1.28	2.54
Tesco Shirley (Bywood Avenue)	222	114	12,442	1.41	0.99	10.39
Total	**1,451**	**834**		**7.47**	**5.23**	**19.08**

Source/Notes:

1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.*

Table 10c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	24.31			25.30		0.99	26.06		1.75	26.97		2.66	28.03		3.72
Benchmark Turnover (£m)		5.23			5.31	0.08		5.39	0.16		5.47	0.24		5.55	0.32
Expenditure growth surplus (£m)			**0.00**			**0.91**			**1.59**			**2.42**			**3.39**
Base Date Overtrading (£m)			19.08			19.08			19.08			19.08			19.08
Potential expenditure surplus (£m)			**19.08**			**19.99**			**20.67**			**21.50**			**22.48**

Source/Notes:
1 Store turnover assumes a constant market share (17%) and inflow.
2 Base date overtrading assumes a constant market share.

Zone 3 Coulsdon

Table 11a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 3 main food available expenditure (£m)	Market share of Zone 3 main food expenditure (%)	Stores' turnover derived from Zone 3 residents (£m)	Inflow to store from beyond Zone 3 (%)	Inflow to store from beyond Zone 3 (£m)	Survey derived turnover (£m)
	33.45					
Waitrose Coulsdon		10.44%	3.49	23.54%	1.08	4.57
Total	**33.45**	**10%**	**3.49**		**1.08**	**4.57**
Leakage						
Tesco Purley		40.05%	13.40			
Croydon Metropolitan Centre		2.31%	0.77			
Purley Way Retail Parks		6.85%	2.29			
Total		**60%**	**19.95**			

Source/Notes:
1 *Total main food available expenditure for Zone 3 has been taken from Table 3a.*
2 *Market shares of Zone 3 total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 3 have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 3 estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 3 residents plus inflow.*

Table 11b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Waitrose Coulsdon	912	629	11,285	7.10	4.97	-0.40
Total	**912**	**629**	**11,285**	**7.10**	**4.97**	**-0.40**

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.*

Table 11c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	4.57			4.78		0.22	5.05		0.48	5.27		0.71	5.48		0.91
Benchmark Turnover (£m)		4.97			5.04	0.07		5.12	0.15		5.20	0.23		5.27	0.31
Expenditure growth surplus (£m)			**0.00**			**0.14**			**0.33**			**0.48**			**0.61**

Source/Notes:
1 *Store turnover assumes a constant market share (10%) and inflow.*
2 *Base date overtrading assumes a constant market share.*

Table 11d - Commitments at 2010

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Main food trips benchmark turnover from Zone 3 (£m)
Sainsbury's Coulsdon	5,446	3,540	9,461	33.49	30.14	18.08
Aldi Coulsdon	1,538	1,077	5,205	5.60	4.48	2.69

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices and grown at +0.3% pa.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Sainsbury's assumed to draw 60% of trade from within Zone 3.*
7 *Aldi assumed to draw 60% of trade from within Zone 3.*

Table 11e - Convenience Expenditure Growth Potential including commitments at forecast dates main food only

	2010	**2015**	**2020**	**2025**
Benchmark turnover of existing stores within centre	5.04	5.12	5.20	5.27
Turnover of Commitments				
Sainsbury's	18.08	18.36	18.63	18.92
Aldi	2.69	2.73	2.77	2.81
Total turnover	25.82	26.21	26.60	27.00
Combined market share of Zone 3 expenditure	74%	71%	69%	67%

Table 11f - Comparison Expenditure Distribution

Centre name	Total Zone 3 comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 3 comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 3 comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
Coulsdon	82.03	6,395	4,796	14.39	18%	133.27	23.38	**8.99**	224.34	39.35	**24.96**

Source/Notes:

1 *Total available comparison expenditure for Zone 3 has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 4 Purley

Table 12a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 4 main food available expenditure (£m)	Market share of Zone 4 main food expenditure (%)	Stores' turnover derived from Zone 4 residents (£m)	Inflow to store from beyond Zone 4 (%)	Inflow to store from beyond Zone 4 (£m)	Survey derived turnover (£m)
	62.16					
Tesco Purley		54.19%	33.69	58.33%	47.15	80.84
Co-op Wallington		0.13%	0.08	0.00%	0.00	0.08
Total	**62.16**	**54%**	**33.77**		**47.15**	**80.92**
Leakage						
Waitrose Coulsdon		1.14%	0.71			
Croydon Metropolitan Centre		6.05%	3.76			
Purley Way Retail Parks		6.87%	4.27			
Sainsbury's Selsdon		5.66%	3.52			
Waitrose Sanderstead		2.68%	1.67			
New Addington		0.19%	0.12			
Total		**77%**	**47.81**			

Source/Notes:
1 *Total main food available expenditure for Zone 4 has been taken from Table 3a.*
2 *Market shares of Zone 4 total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 4 have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 4 estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 4 residents plus inflow.*

Table 12b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Tesco Purley	9,540	3,969	12,442	49.38	44.45	36.39
Co-op Wallington	251	164	5,599	0.92	0.64	-0.56
Total	**9,791**	**4,133**		**50.30**	**45.09**	**35.83**

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.*

Table 12c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	80.92			85.09		4.17	88.93		8.01	92.60		11.68	96.22		15.30
Benchmark Turnover (£m)		45.09			45.77	0.68		46.46	1.37		47.16	2.07		47.87	2.78
Expenditure growth surplus (£m)			**0.00**			**3.49**			**6.64**			**9.61**			**12.51**
Base Date Overtrading (£m)			35.83			35.83			35.83			35.83			35.83
Potential expenditure surplus (£m)			**35.83**			**39.33**			**42.48**			**45.44**			**48.34**

<u>*Source/Notes:*</u>
1 *Store turnover assumes a constant market share (54%) and inflow.*
2 *Base date overtrading assumes a constant market share.*

Table 12d - Commitments at 2010

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Main food trips benchmark turnover from Zone 4 (£m)
Purley	4,002	2,801	£8,000	22.41	17.93	10.76

<u>*Source/Notes:*</u>
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices and grown at +0.3% pa.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Store benchmark turnover assumed at £8,000/sq m (DJ estimate).*
7 *Store assumed to draw 60% of trade from within Zone 4.*

Table 12e - Convenience Expenditure Growth Potential including commitments at forecast dates main food only

	2010	2015	2020	2025
Benchmark turnover of existing stores within centre	45.12	45.80	46.49	47.19
Turnover of Commitments Purley	10.76	10.92	11.08	11.25
Total turnover	55.87	56.72	57.57	58.44
Combined market share of Zone 4 expenditure	85%	83%	81%	79%

Table 12f - Comparison Expenditure Distribution

Centre name	Total Zone 4 comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 4 comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 4 comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
Purley	152.09	7,919	5,939	17.82	12%	245.73	28.79	**10.97**	412.20	48.29	**30.47**

Source/Notes:

1 *Total available comparison expenditure for Zone 4 has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 5 Selsdon

Table 13a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 5 main food available expenditure (£m)	Market share of Zone 5 main food expenditure (%)	Stores' turnover derived from Zone 5 residents (£m)	Inflow to store from beyond Zone 5 (%)	Inflow to store from beyond Zone 5 (£m)	Survey derived turnover (£m)
	55.15					
Somerfield Forest Dale		0.93%	0.51	25.47%	0.18	0.69
Sainsbury's Selsdon		35.60%	19.63	26.87%	7.21	26.84
Waitrose South Croydon (Limpsfield Road)		4.26%	2.35	45.59%	1.97	4.32
Total	**55.15**	**41%**	**22.49**		**9.36**	**31.85**
Leakage						
Iceland New Addington		1.89%	1.04			
Croydon Metropolitan Centre		7.48%	4.13			
Purley Way Retail Parks		6.77%	3.73			
Waitrose Couldson		0.26%	0.14			
Tesco Purley		34.63%	19.10			
Total		**91.82%**	**50.63**			

Source/Notes:

1 Total main food available expenditure for Zone 5 has been taken from Table 3a.
2 Market shares of Zone 5 total available main food expenditure for each store have been provided by Retail Reach MapInfo.
3 Estimates of inflow of expenditure to each store from beyond Zone 5 have been provided by Retail Reach MapInfo.
4 Inflow to store from beyond Zone 5 estimates are expressed as percentages of each store's total turnover.
5 Total store turnover is the sum of the stores' turnover derived from Zone 5 residents plus inflow.

Table 13b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Somerfield Forest Dale	679	442	7,091	3.14	2.19	-1.51
Sainsbury's Selsdon	3,585	1,836	9,461	17.37	13.89	12.95
Waitrose South Croydon (Limpsfield Road)	1,660	1,001	11,285	11.30	9.04	-4.72
Total	**5,924**	**3,279**		**31.80**	**25.13**	**6.72**

Source/Notes:

1 Total gross floorspace figures have been provided by LB Croydon.
2 The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.
3 Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.
4 Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.
5 Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.
6 Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.

Table 13c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	31.85			32.79		0.94	33.62		1.77	34.75		2.89	36.10		4.25
Benchmark Turnover (£m)		25.13			25.51	0.38		25.89	0.76		26.28	1.15		26.68	1.55
Expenditure growth surplus (£m)			**0.00**			**0.56**			**1.01**			**1.74**			**2.70**
Base Date Overtrading (£m)			6.72			6.72			6.72			6.72			6.72
Potential expenditure surplus (£m)			**6.72**			**7.28**			**7.73**			**8.46**			**9.42**

Source/Notes:
1 Store turnover assumes a constant market share (41%) and inflow.
2 Base date overtrading assumes a constant market share.

Table 13d - Comparison Expenditure Distribution

Centre name	Total Zone 5 comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 5 comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 5 comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
Selsdon	134.01	2,851	2,138	6.41	5%	207.95	9.95	**3.54**	346.24	16.57	**10.16**

Source/Notes:

1 *Total available comparison expenditure for Zone 5 has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*

Zone 6 New Addington

Table 14a - Convenience Expenditure Market Shares - main food trips at 2005

Store name	Total Zone 6 main food available expenditure (£m)	Market share of Zone 6 main food expenditure (%)	Stores' turnover derived from Zone 6 residents (£m)	Inflow to store from beyond Zone 6 (%)	Inflow to store from beyond Zone 6 (£m)	Survey derived turnover (£m)
	16.37					
Iceland New Addington		15.81%	2.59	52.09%	2.81	5.40
Co-op New Addington		1.19%	0.19	0.00%	0.00	0.19
Total	**16.37**	**17%**	**2.78**		**2.81**	**5.60**
Leakage						
Somerfield Forest Dale		0.40%	0.07			
Sainsbury's Selsdon		11.46%	1.88			
Croydon Metropolitan Centre		6.97%	1.14			
Purley Way Retail Parks		22.64%	3.71			
Tesco Purley		18.58%	3.04			
Total		**77.04%**	**12.61**			

Source/Notes:
1 *Total main food available expenditure for Zone 6 has been taken from Table 3a.*
2 *Market shares of Zone 6 total available main food expenditure for each store have been provided by Retail Reach MapInfo.*
3 *Estimates of inflow of expenditure to each store from beyond Zone 6 have been provided by Retail Reach MapInfo.*
4 *Inflow to store from beyond Zone 6 estimates are expressed as percentages of each store's total turnover.*
5 *Total store turnover is the sum of the stores' turnover derived from Zone 6 residents plus inflow.*

Table 14b - Convenience benchmark turnovers at 2005

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Survey derived / benchmark turnover variation (£m)
Iceland New Addington	650	485	5,498	2.67	1.87	2.73
Co-op New Addington	344	225	5,599	1.26	0.88	-1.06
Total	**994**	**710**		**3.93**	**2.75**	**1.67**

Source/Notes:
1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Estimates of over/undertrading are based on a comparison of the 'actual' turnover of each store as estimated by Retail Reach MapInfo model and 70% of company benchmark turnovers.*

Table 14c - Convenience Expenditure Growth Potential - main food trips at forecast dates

	2005			2010			2015			2020			2025		
	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference	Survey	Benchmark	Difference
Store Turnover (£m)	5.60			5.71		0.11	5.84		0.25	6.03		0.44	6.27		0.67
Benchmark Turnover (£m)		2.75			2.79	0.04		2.83	0.08		2.87	0.13		2.92	0.17
Expenditure growth surplus (£m)			**0.00**			**0.07**			**0.16**			**0.31**			**0.50**
Base Date Overtrading (£m)			2.85			2.85			2.85			2.85			2.85
Total surplus expenditure (£m)			**2.85**			**2.92**			**3.01**			**3.16**			**3.35**

Source/Notes:

1 *Store turnover assumes a constant market share (17%) and inflow.*
2 *Base date overtrading assumes a constant market share.*

Table 14d - Commitments at 2010

Store name	Total gross floorspace (sqm)	Net convenience floorspace (sqm)	Company average turnover (£/sqm)	Total benchmark turnover (£m)	Main food trips benchmark turnover (£m)	Main food trips benchmark turnover from Zone 6 (£m)
Lidl New Addington	1,635	1,145	£5,205	5.96	4.77	2.86
Tesco New Addington	4,000	2,800	£12,442	34.84	27.87	13.93

Source/Notes:

1 *Total gross floorspace figures have been provided by LB Croydon.*
2 *The following net:gross assumptions have been applied: stores over 5,000 sqm - 65%; stores 1,000-4,999 sqm - 70%; stores under 1,000 sqm - 80%.*
3 *Estimates of total convenience floorspace have been derived by applying company average convenience:comparison ratios (Verdict 2008) to the total net floorspace figures.*
4 *Company average turnover ratios have been sourced from Verdict 2008 and Retail Rankings 2008. Figures are expressed in 2005 prices and grown at +0.3% pa.*
5 *Main food trips benchmark turnover estimates are 70% of the total benchmark turnover estimates for stores under 1,000 sqm; 80% for stores between 1,000-4,999 sqm and 90% for stores over 5,000 sqm.*
6 *Aldi assumed to draw 60% of trade from within Zone 1c.*
7 *Tesco floorspace DJ Estimate.*

Table 14e - Convenience Expenditure Growth Potential including commitments at forecast dates main food only

	2010	2015	2020	2025
Available Expenditure (£m)	16.71	17.09	17.65	18.34
Market Share of Expenditure (80%)	13.37	13.67	14.12	14.67
Benchmark turnover of existing stores within centre	1.90	1.93	1.95	1.98
Turnover of Commitments				
Lidl	2.86	2.90	2.95	2.99
Tesco	13.93	14.15	14.36	14.58
Total turnover	18.69	18.97	19.26	19.55
Turnover drawn from outside of the Zone	5.33	5.30	5.14	4.88
Percentage of stores turnover drawn from outside of Zone	28%	28%	27%	25%

Table 14f - Comparison Expenditure Distribution

Centre name	Total Zone 6 comparison available expenditure (£m) 2005	Total gross floorspace (sqm)	Net comparison floorspace (sqm)	Total benchmark turnover (£m) 2005	Ratio	Total Zone 1a comparison available expenditure (£m) 2015	2015 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2015 (£m)	Total Zone 1a comparison available expenditure (£m) 2025	2025 Expenditure (£m) (Constant Ratio)	Expenditure market growth 2005-2025 (£m)
New Addington	36.62	2,636	1,977	5.93	16%	56.19	9.10	**3.17**	93.48	15.14	**9.21**

Source/Notes:

1 *Total available comparison expenditure for Zone 6 has been taken from Table 3b.*
2 *It has been assumed that net floorspace equates to 75% of gross.*
3 *Average turnover ratios of £3,000/sq. m at 2005 have been estimated by Drivers Jonas.*