

# DARTFORD & EBBSFLEET: RETAIL AND LEISURE STUDY

## *APPENDIX A*

for:

DARTFORD BOROUGH  
COUNCIL  
&  
EBBSFLEET  
DEVELOPMENT  
CORPORATION

January 2021

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This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release. If not signed off, the document should be treated as a draft and as being private and confidential, and not for wider distribution without the written permission of Lambert Smith Hampton.

Signed:

A handwritten signature in black ink, appearing to read "Steve Day". The signature is fluid and cursive, with the first name "Steve" and the last name "Day" clearly distinguishable.

.....  
For and on behalf of Lambert Smith Hampton

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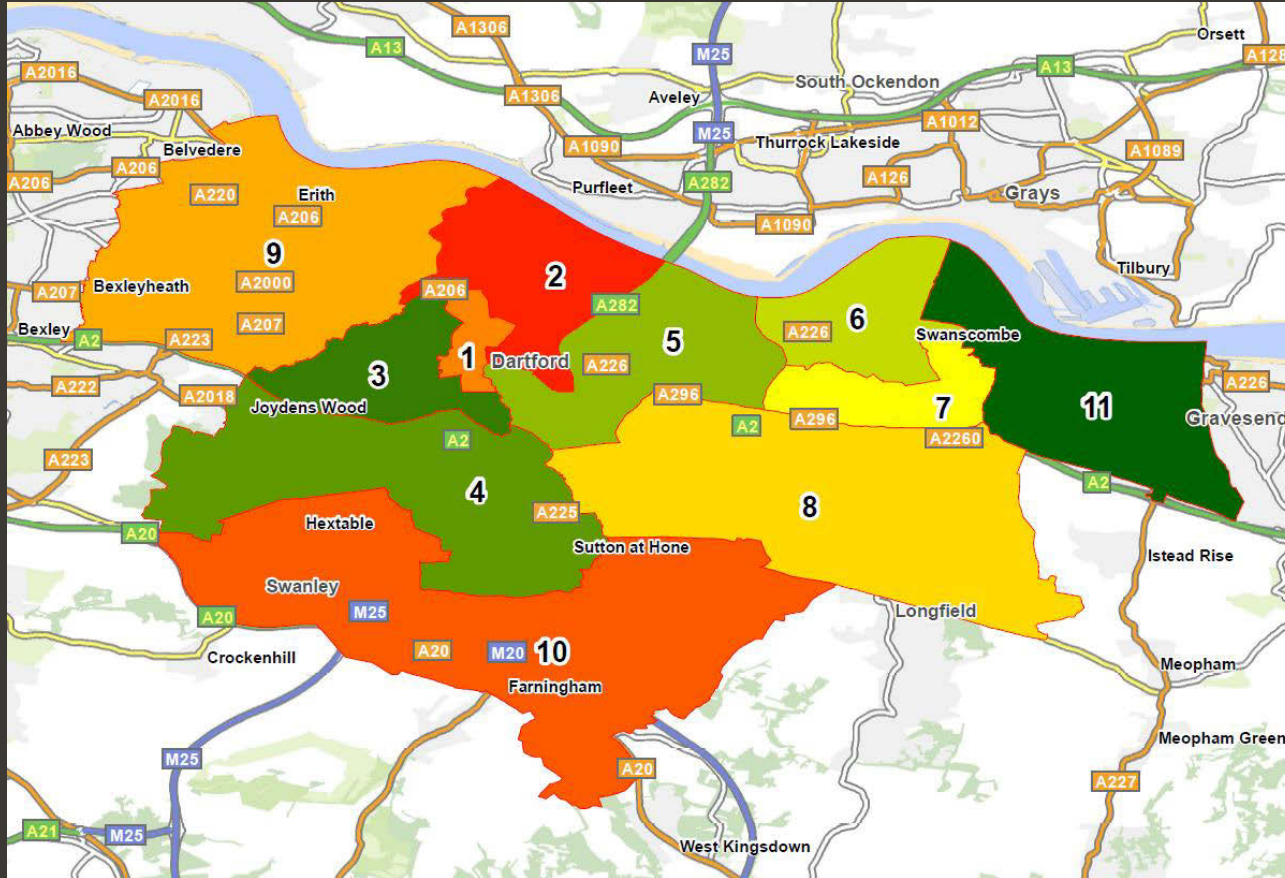
Dartford Town Centre: Street Interview Survey – Method Statement and Tabulations

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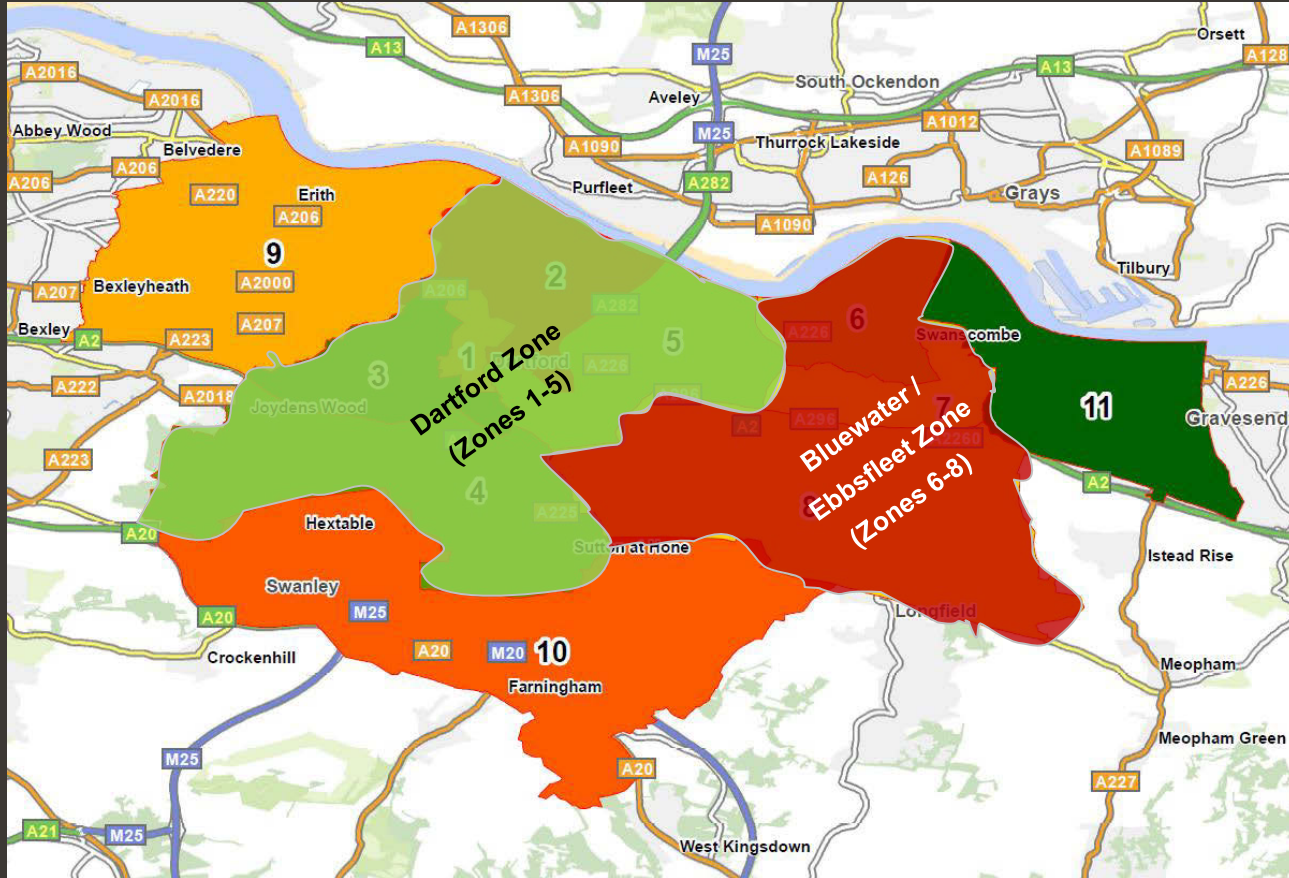
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# APPENDIX A1

# CATCHMENT / STUDY AREA & ZONES



# CATCHMENT / STUDY AREA & ZONES



# APPENDIX A2

**TABLE 1: 'BASELINE' POPULATION & PROJECTIONS (2019 - 2036)**

	Experian	Population Baseline & Projections						Growth 2020 2030:		Growth 2020 2036:	
		2019	2020	2025	2030	2035	2036	%	No.	%	No.
Zone 1	2,524	2,645	3,145	5,642	6,609	7,572	7,764	110.2%	3,465	146.9%	4,620
Zone 2	17,819	17,941	17,963	18,071	18,272	18,473	18,513	1.7%	309	3.1%	550
Zone 3	23,529	23,529	23,551	23,659	23,836	24,013	24,048	1.2%	285	2.1%	497
Zone 4	16,736	16,736	16,751	16,828	16,989	17,150	17,182	1.4%	238	2.6%	431
Zone 5	19,877	19,998	20,197	21,192	22,012	22,829	22,992	9.0%	1,815	13.8%	2,795
Zone 6	14,349	14,470	14,711	15,917	16,175	16,432	16,483	10.0%	1,464	12.0%	1,772
Zone 7	1,444	1,566	2,896	9,543	16,243	22,915	24,244	461.0%	13,348	737.3%	21,349
Zone 8	12,815	12,815	12,829	12,901	13,029	13,157	13,182	1.6%	200	2.7%	353
Zone 9	79,641	79,641	80,587	85,341	89,924	94,170	94,981	11.6%	9,337	17.9%	14,394
Zone 10	27,004	27,004	27,242	28,350	29,341	30,337	30,508	7.7%	2,099	12.0%	3,266
Zone 11	43,601	43,601	44,060	46,243	48,350	50,476	50,904	9.7%	4,290	15.5%	6,844
<b>STUDY AREA - TOTAL:</b>	<b>259,339</b>	<b>259,946</b>	<b>263,931</b>	<b>283,687</b>	<b>300,780</b>	<b>317,524</b>	<b>320,801</b>	<b>14.0%</b>	<b>36,849</b>	<b>21.5%</b>	<b>56,870</b>

Zones 1-5	DARTFORD WEST (incl Dartford Town Centre)	80,485	80,849	81,606	85,392	87,718	90,037	90,499	7.5%	6,112	10.9%	8,893
Zones 6-8	DARTFORD EAST (incl Bluewater / Ebbsfleet)	28,608	28,851	30,436	38,361	45,447	52,504	53,909	49.3%	15,011	77.1%	23,473
Zones 9-11	OUTSIDE BOROUGH	150,246	150,246	151,889	159,934	167,615	174,983	176,393	10.4%	15,726	16.1%	24,504
<b>STUDY AREA - TOTAL:</b>		<b>259,339</b>	<b>259,946</b>	<b>263,931</b>	<b>283,687</b>	<b>300,780</b>	<b>317,524</b>	<b>320,801</b>	<b>14.0%</b>	<b>36,849</b>	<b>21.5%</b>	<b>56,870</b>

Source: Experian Business Strategies - MMG3 Geographic Information Systems (GIS) 'Retail Area Planner Population & Expenditure Datasets'  
Notes: Base year population & projections for Zones 1-8 sourced from Dartford Borough Council. Forecasts for Zones 9-11 have been sourced from LSH's Experian MMG3 datasets

**TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)**

	2019 Including SFT	2019	2020	2025	2030	2035	2036
		Excluding SFT					
<b>EXPERIAN-BASED SFT MARKET SHARES (%):</b>	<b>Scenario 1:</b>	<b>4.2%</b>	<b>6.3%</b>	<b>6.2%</b>	<b>6.8%</b>	<b>7.1%</b>	<b>7.2%</b>
<b>SURVEY-BASED SFT MARKET SHARES (%):</b>	<b>Scenario 2:</b>	<b>1.4%</b>	<b>2.1%</b>	<b>2.3%</b>	<b>2.4%</b>	<b>2.5%</b>	<b>2.5%</b>
Zone 1	£2,416	£2,315	£2,454	£2,309	£2,301	£2,305	£2,305
Zone 2	£2,143	£2,053	£2,176	£2,048	£2,041	£2,044	£2,044
Zone 3	£2,308	£2,211	£2,344	£2,205	£2,198	£2,202	£2,202
Zone 4	£2,489	£2,384	£2,528	£2,378	£2,370	£2,374	£2,374
Zone 5	£2,254	£2,160	£2,290	£2,154	£2,147	£2,151	£2,151
Zone 6	£2,181	£2,089	£2,215	£2,084	£2,077	£2,081	£2,081
Zone 7	£2,547	£2,440	£2,587	£2,434	£2,426	£2,430	£2,430
Zone 8	£2,611	£2,502	£2,652	£2,496	£2,487	£2,492	£2,491
Zone 9	£2,146	£2,056	£2,179	£2,051	£2,044	£2,047	£2,047
Zone 10	£2,441	£2,339	£2,480	£2,333	£2,325	£2,329	£2,329
Zone 11	£2,136	£2,046	£2,169	£2,041	£2,034	£2,038	£2,037
<b>STUDY AREA - AVERAGE</b>	<b>£2,334</b>	<b>£2,236</b>	<b>£2,370</b>	<b>£2,230</b>	<b>£2,223</b>	<b>£2,227</b>	<b>£2,227</b>

Source: Average spend per capita estimates (2017 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 17 published by Experian Business Strategies (February 202).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and internet shopping) drawing on Experian's latest Retail Planner Briefing Note 17 (Figure 5). The market shares have been adjusted for SFT sales from stores.

**TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million)**

	2019 Incl SFT	2019	2020	2025	2030	2035	2036	Growth 2020 2030:		Growth 2020 2036:		
		Excluding SFT						%	£m	%	£m	
Zone 1	£6.4	£6.1	£7.7	£13.0	£15.2	£17.5	£17.9	97.1%	£7.5	131.9%	£10.2	
Zone 2	£38.4	£36.8	£39.1	£37.0	£37.3	£37.8	£37.8	-4.6%	-£1.8	-3.2%	-£1.2	
Zone 3	£54.3	£52.0	£55.2	£52.2	£52.4	£52.9	£52.9	-5.1%	-£2.8	-4.1%	-£2.3	
Zone 4	£41.7	£39.9	£42.3	£40.0	£40.3	£40.7	£40.8	-4.9%	-£2.1	-3.7%	-£1.5	
Zone 5	£45.1	£43.2	£46.2	£45.7	£47.3	£49.1	£49.4	2.2%	£1.0	6.9%	£3.2	
Zone 6	£31.6	£30.2	£32.6	£33.2	£33.6	£34.2	£34.3	3.1%	£1.0	5.2%	£1.7	
Zone 7	£4.0	£3.8	£7.5	£23.2	£39.4	£55.7	£58.9	426.0%	£31.9	686.4%	£51.4	
Zone 8	£33.5	£32.1	£34.0	£32.2	£32.4	£32.8	£32.8	-4.8%	-£1.6	-3.5%	-£1.2	
Zone 9	£170.9	£163.7	£175.6	£175.0	£183.8	£192.8	£194.4	4.6%	£8.1	10.7%	£18.8	
Zone 10	£65.9	£63.2	£67.6	£66.1	£68.2	£70.7	£71.1	1.0%	£0.7	5.2%	£3.5	
Zone 11	£93.1	£89.2	£95.6	£94.4	£98.3	£102.8	£103.7	2.9%	£2.8	8.5%	£8.1	
<b>STUDY AREA - TOTAL:</b>	<b>£584.8</b>	<b>£560.2</b>	<b>£603.5</b>	<b>£612.0</b>	<b>£648.2</b>	<b>£686.9</b>	<b>£694.2</b>	<b>6.9%</b>	<b>£41.9</b>	<b>14.7%</b>	<b>£82.6</b>	
Zones 1-5	DARTFORD WEST (incl Dartford Town Centre)	£185.9	£178.1	£190.6	£187.9	£192.4	£197.9	£198.9	1.0%	£1.8	4.4%	£8.3
Zones 6-8	DARTFORD EAST (incl Bluewater / Ebbsfleet)	£69.0	£66.1	£74.1	£88.6	£105.4	£122.7	£126.0	42.2%	£31.3	70.1%	£51.9
Zones 9-11	OUTSIDE BOROUGH	£329.9	£316.1	£338.8	£335.5	£350.3	£366.3	£369.2	3.4%	£11.6	9.0%	£30.4
<b>STUDY AREA - TOTAL:</b>	<b>£584.8</b>	<b>£560.2</b>	<b>£603.5</b>	<b>£612.0</b>	<b>£648.2</b>	<b>£686.9</b>	<b>£694.2</b>	<b>7.4%</b>	<b>£44.7</b>	<b>15.0%</b>	<b>£90.7</b>	



TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

	2019	2019	2020	2025	2030	2035	2036
	Incl SFT	Excluding SFT					
<b>EXPERIAN-BASED SFT MARKET SHARES (%):</b>	<b>Scenario 1:</b>	<b>17.6%</b>	<b>22.9%</b>	<b>24.6%</b>	<b>26.9%</b>	<b>28.1%</b>	<b>28.7%</b>
<b>SURVEY-BASED SFT MARKET SHARES (%):</b>	<b>Scenario 2:</b>	<b>14.7%</b>	<b>19.1%</b>	<b>20.5%</b>	<b>22.4%</b>	<b>23.4%</b>	<b>23.5%</b>
Zone 1	£3,999	£3,295	£2,821	£3,332	£3,734	£4,238	£4,354
Zone 2	£3,772	£3,108	£2,661	£3,144	£3,523	£3,997	£4,108
Zone 3	£4,205	£3,465	£2,966	£3,504	£3,927	£4,456	£4,579
Zone 4	£4,905	£4,042	£3,461	£4,088	£4,581	£5,199	£5,342
Zone 5	£4,100	£3,378	£2,892	£3,417	£3,829	£4,345	£4,464
Zone 6	£3,709	£3,056	£2,616	£3,091	£3,464	£3,930	£4,039
Zone 7	£5,353	£4,411	£3,777	£4,461	£5,000	£5,673	£5,830
Zone 8	£5,281	£4,352	£3,726	£4,401	£4,932	£5,597	£5,751
Zone 9	£3,767	£3,104	£2,657	£3,139	£3,518	£3,992	£4,102
Zone 10	£4,522	£3,726	£3,190	£3,768	£4,223	£4,792	£4,924
Zone 11	£3,672	£3,026	£2,591	£3,060	£3,429	£3,891	£3,999
<b>STUDY AREA - AVERAGE</b>	<b>£4,299</b>	<b>£3,542</b>	<b>£3,032</b>	<b>£3,582</b>	<b>£4,015</b>	<b>£4,555</b>	<b>£4,681</b>

Source: Average spend per capita estimates (2017 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest RPN published by Experian Business Strategies.

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and internet shopping) drawing on Experian's latest Retail Planner Briefing Note 17 (February 2020), Figure 5. The market shares have been adjusted for SFT sales from stores.

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

	2019	2019	2020	2025	2030	2035	2036	Growth 2020 2030:		Growth 2020 2036:	
	Incl SFT	Excluding SFT						%	£m	%	£m
Zone 1	£10.6	£8.7	£8.9	£18.8	£24.7	£32.1	£33.8	178.2%	£15.8	281.1%	£24.9
Zone 2	£67.7	£55.8	£47.8	£56.8	£64.4	£73.8	£76.0	34.7%	£16.6	59.1%	£28.2
Zone 3	£98.9	£81.5	£69.9	£82.9	£93.6	£107.0	£110.1	34.0%	£23.7	57.6%	£40.3
Zone 4	£82.1	£67.6	£58.0	£68.8	£77.8	£89.2	£91.8	34.3%	£19.9	58.3%	£33.8
Zone 5	£82.0	£67.6	£58.4	£72.4	£84.3	£99.2	£102.6	44.3%	£25.9	75.7%	£44.2
Zone 6	£53.7	£44.2	£38.5	£49.2	£56.0	£64.6	£66.6	45.6%	£17.5	73.0%	£28.1
Zone 7	£8.4	£6.9	£10.9	£42.6	£81.2	£130.0	£141.3	642.7%	£70.3	1192.5%	£130.4
Zone 8	£67.7	£55.8	£47.8	£56.8	£64.3	£73.6	£75.8	34.4%	£16.5	58.6%	£28.0
Zone 9	£300.0	£247.2	£214.1	£267.9	£316.3	£375.9	£389.6	47.7%	£102.2	81.9%	£175.4
Zone 10	£122.1	£100.6	£86.9	£106.8	£123.9	£145.4	£150.2	42.6%	£37.0	72.9%	£63.3
Zone 11	£160.1	£131.9	£114.1	£141.5	£165.8	£196.4	£203.6	45.3%	£51.7	78.3%	£89.4
<b>STUDY AREA - TOTAL:</b>	<b>£1,053.2</b>	<b>£867.8</b>	<b>£755.3</b>	<b>£964.5</b>	<b>£1,152.3</b>	<b>£1,387.2</b>	<b>£1,441.5</b>	<b>52.6%</b>	<b>£397.0</b>	<b>79.1%</b>	<b>£686.2</b>
Zones 1-5 DARTFORD WEST (incl Dartford Town Centre)	£341.3	£281.2	£242.9	£299.7	£344.8	£401.3	£414.4	41.9%	£101.9	70.6%	£171.5
Zones 6-8 DARTFORD EAST (incl Bluewater / Ebbsfleet)	£129.7	£106.9	£97.2	£148.6	£201.5	£268.2	£283.7	107.3%	£104.3	191.8%	£186.5
Zones 9-11 OUTSIDE BOROUGH	£582.2	£479.7	£415.2	£516.2	£606.1	£717.7	£743.4	46.0%	£190.9	79.0%	£328.2
<b>STUDY AREA - TOTAL:</b>	<b>£1,053.2</b>	<b>£867.8</b>	<b>£755.3</b>	<b>£964.5</b>	<b>£1,152.3</b>	<b>£1,387.2</b>	<b>£1,441.5</b>	<b>52.6%</b>	<b>£397.0</b>	<b>79.1%</b>	<b>£686.2</b>

	2019	2019	2020	2025	2030	2035	2036	GROWTH: 2019 2036	
	Incl SFT	Excluding SFT						%	£m
<b>COMPARISON GOODS - AVAILABLE EXPENDITURE (£m):</b>									
Scenario 1: Experian-based SFT Market Shares	£1,053	£868	£755	£965	£1,152	£1,387	£1,441	66.1%	£574
Scenario 2: Survey-Derived SFT Market Shares	£1,053	£899	£793	£1,017	£1,223	£1,478	£1,536	70.9%	£637
<b>Difference between Scenarios 1 &amp; 2:</b>	<b>£0</b>	<b>-£31</b>	<b>-£37</b>	<b>-£53</b>	<b>-£71</b>	<b>-£91</b>	<b>-£95</b>		<b>-£64</b>
<b>CONVENIENCE GOODS - AVAILABLE EXPENDITURE (£m):</b>									
Scenario 1: Experian-based SFT Market Shares	£585	£560	£603	£612	£648	£687	£694	23.9%	£134
Scenario 2: Survey-Derived SFT Market Shares	£585	£576	£630	£639	£679	£721	£730	26.6%	£153
<b>Difference between Scenarios 1 &amp; 2:</b>	<b>£0.0</b>	<b>-£16</b>	<b>-£27</b>	<b>-£27</b>	<b>-£31</b>	<b>-£35</b>	<b>-£35</b>		<b>-£19</b>

# APPENDIX A3











# APPENDIX A4













**DARTFORD EBBSFLEET RETAIL LEISURE STUDY 2020:**  
**COMPARISON GOODS MARKET SHARE ANALYSIS**

**TABLE 11: [Q22] Where do households normally shop for all other goods (including jewellery/watches, glassware, china, tableware, household utensils and other personal effects (e.g. travel goods) Including Special Forms of Trading**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	23.1%	30.8%	26.3%	15.2%	10.9%	7.1%	0.0%	1.8%	0.8%	5.9%	1.1%	20.9%	3.9%	2.0%	8.6%
Orchards Shopping Centre	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.1%	0.0%	1.3%	0.7%
Prospect Place	0.0%	4.3%	5.4%	0.0%	2.3%	0.0%	0.0%	1.4%	0.0%	2.4%	0.0%	3.0%	0.7%	0.5%	1.4%
Priory Shopping Centre	0.0%	0.0%	3.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.4%
<b>SUB-TOTAL:</b>	<b>25.0%</b>	<b>35.2%</b>	<b>35.0%</b>	<b>16.2%</b>	<b>13.2%</b>	<b>7.1%</b>	<b>0.0%</b>	<b>3.3%</b>	<b>3.5%</b>	<b>8.3%</b>	<b>1.1%</b>	<b>25.2%</b>	<b>4.6%</b>	<b>3.8%</b>	<b>11.1%</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dartford Heath Retail Park	0.0%	2.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.6%	0.0%	0.3%	0.4%
Homebase / Argos	1.5%	1.8%	0.0%	1.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.3%
Asda, Crossways Boulevard	1.8%	4.4%	0.0%	0.0%	1.5%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	1.4%	0.9%	0.0%	0.6%
<b>SUB-TOTAL:</b>	<b>3.3%</b>	<b>8.2%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>3.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.8%</b>	<b>0.0%</b>	<b>1.2%</b>	<b>0.0%</b>	<b>2.9%</b>	<b>0.9%</b>	<b>0.3%</b>	<b>1.2%</b>
<b>BLUEWATER SHOPPING CENTRE:</b>															
	46.7%	33.8%	43.1%	55.5%	64.5%	62.6%	49.9%	62.9%	26.2%	48.1%	56.8%	49.3%	61.9%	40.0%	46.1%
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Temple Hill Square	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dartford East	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dartford West	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Longfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%	0.1%
Swanscombe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>SUB-TOTAL:</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.1%</b>
<b>NEIGHBOURHOOD CENTRES:</b>															
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ebbsfleet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All other Parades, Shops & Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>SUB-TOTAL:</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	3.2%	0.0%	40.3%	7.2%	0.0%	0.2%	0.2%	21.2%	11.3%
Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%	0.1%
Crayford	1.8%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.8%	0.0%	1.3%	1.0%
Erith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	1.7%	0.9%
Gravesend	1.5%	0.0%	0.0%	0.0%	3.5%	6.3%	0.0%	3.1%	0.0%	1.7%	27.0%	0.9%	4.2%	8.4%	5.3%
Northfleet	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.2%
Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.5%	0.3%
Swanley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.9%	0.0%	0.0%	0.0%	2.7%	1.5%
Lakeside	5.4%	1.8%	4.8%	3.5%	0.0%	1.9%	10.8%	3.3%	4.3%	3.9%	0.0%	2.7%	3.2%	2.9%	2.9%
All other Centres, Shops & Stores:	7.0%	1.0%	1.3%	5.1%	1.2%	5.7%	4.8%	3.5%	4.3%	4.3%	3.6%	2.2%	4.5%	4.1%	3.5%
<b>SUB-TOTAL:</b>	<b>15.7%</b>	<b>2.8%</b>	<b>8.6%</b>	<b>9.7%</b>	<b>4.6%</b>	<b>16.6%</b>	<b>18.8%</b>	<b>9.8%</b>	<b>55.1%</b>	<b>33.4%</b>	<b>30.6%</b>	<b>6.8%</b>	<b>13.3%</b>	<b>43.2%</b>	<b>26.9%</b>
<b>INTERNET / SPECIAL FORMS OF TRADING</b>															
	9.4%	20.1%	13.2%	17.5%	14.5%	13.6%	31.3%	22.2%	15.2%	7.8%	11.5%	15.8%	19.3%	12.5%	14.5%
<b>TOTAL:</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

# APPENDIX A5

















# APPENDIX A6

**TABLE 1: 2019 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)**

*Excluding Special Forms of Trading*

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	29.8%	31.7%	20.0%	13.5%	17.3%	7.2%	0.9%	4.3%	4.5%	7.6%	0.7%	20.4%	5.3%	4.1%	9.6%
Orchards Shopping Centre	2.0%	3.0%	3.7%	0.9%	0.3%	0.2%	0.0%	0.2%	1.0%	0.4%	0.6%	2.1%	0.2%	0.8%	1.1%
Prospect Place	4.0%	10.2%	9.5%	7.8%	7.8%	2.4%	0.9%	3.3%	1.9%	5.6%	1.2%	8.6%	2.8%	2.5%	4.6%
Priory Shopping Centre	3.4%	2.0%	2.5%	1.0%	1.6%	0.0%	0.0%	0.3%	0.8%	0.5%	0.0%	1.9%	0.1%	0.5%	0.9%
<b>SUB-TOTAL:</b>	<b>39.2%</b>	<b>46.9%</b>	<b>35.7%</b>	<b>23.2%</b>	<b>27.0%</b>	<b>9.8%</b>	<b>1.8%</b>	<b>8.0%</b>	<b>8.2%</b>	<b>14.1%</b>	<b>2.5%</b>	<b>32.9%</b>	<b>8.4%</b>	<b>7.9%</b>	<b>16.2%</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	0.3%	0.4%	0.1%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.1%	0.0%	0.1%
Dartford Heath Retail Park	0.0%	2.1%	0.8%	1.7%	0.9%	1.1%	0.0%	0.7%	0.8%	1.2%	0.3%	1.3%	0.8%	0.8%	0.9%
Homebase / Argos	1.4%	1.6%	1.5%	1.5%	1.1%	0.0%	1.0%	0.9%	0.3%	1.1%	0.0%	1.4%	0.5%	0.4%	0.7%
Asda, Crossways Boulevard	3.5%	2.6%	0.7%	0.2%	5.4%	9.8%	5.4%	1.0%	0.4%	0.0%	0.6%	2.1%	5.0%	0.4%	1.5%
<b>SUB-TOTAL:</b>	<b>5.1%</b>	<b>6.7%</b>	<b>3.1%</b>	<b>3.7%</b>	<b>7.5%</b>	<b>11.1%</b>	<b>6.5%</b>	<b>2.7%</b>	<b>1.5%</b>	<b>2.4%</b>	<b>0.9%</b>	<b>5.0%</b>	<b>6.5%</b>	<b>1.5%</b>	<b>3.3%</b>
<b>BLUEWATER SHOPPING CENTRE:</b>															
	33.7%	23.5%	28.4%	38.1%	41.1%	42.6%	59.9%	50.3%	16.8%	29.4%	37.8%	32.9%	47.6%	25.6%	30.8%
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	0.0%	0.3%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Temple Hill Square	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%
Dartford East	0.1%	0.9%	0.3%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
Dartford West	0.0%	0.0%	1.5%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
Longfield	0.0%	0.1%	0.0%	0.2%	0.2%	0.0%	0.0%	5.0%	0.0%	0.3%	0.0%	0.1%	2.6%	0.1%	0.4%
Swanscombe	0.0%	0.0%	0.0%	0.0%	0.3%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.1%	0.0%	0.2%
<b>SUB-TOTAL:</b>	<b>0.1%</b>	<b>2.2%</b>	<b>1.8%</b>	<b>0.4%</b>	<b>1.2%</b>	<b>2.7%</b>	<b>0.0%</b>	<b>5.0%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>1.3%</b>	<b>3.7%</b>	<b>0.1%</b>	<b>1.0%</b>
<b>NEIGHBOURHOOD CENTRES:</b>															
	0.0%	0.4%	0.0%	2.9%	0.5%	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.9%	0.3%	0.0%	0.3%
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	0.0%	0.0%	0.0%	0.6%	1.0%	0.4%	0.7%	0.2%	0.0%	0.2%	0.0%	0.4%	0.3%	0.0%	0.2%
Ebbsfleet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All other Parades, Shops & Stores:	0.0%	0.0%	0.4%	0.2%	0.1%	0.0%	0.0%	0.1%	0.0%	0.9%	0.0%	0.2%	0.1%	0.2%	0.2%
<b>SUB-TOTAL:</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>0.8%</b>	<b>1.0%</b>	<b>0.4%</b>	<b>0.7%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>0.4%</b>	<b>0.2%</b>	<b>0.4%</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	2.6%	1.9%	1.6%	3.1%	0.2%	0.0%	4.5%	0.4%	31.2%	2.0%	0.0%	1.7%	0.5%	15.8%	9.2%
Bromley	0.0%	0.0%	0.0%	0.2%	0.0%	0.3%	0.0%	0.2%	0.1%	1.7%	0.0%	0.0%	0.2%	0.4%	0.3%
Crayford	6.2%	11.8%	21.1%	14.3%	12.4%	3.9%	1.0%	5.5%	19.0%	6.6%	2.8%	15.2%	4.6%	11.6%	11.9%
Erith	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.1%	0.1%	0.0%	4.1%	2.3%
Gravesend	2.8%	1.7%	0.3%	0.4%	1.8%	18.4%	5.4%	13.3%	0.0%	0.4%	45.0%	1.0%	14.9%	12.8%	9.2%
Northfleet	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.3%	0.2%	0.0%	0.4%	0.0%	0.3%	0.2%	0.2%
Orpington	0.1%	0.2%	0.8%	3.1%	0.2%	0.7%	0.0%	0.8%	0.7%	10.8%	0.1%	1.1%	0.7%	2.8%	2.0%
Swanley	0.0%	0.4%	0.2%	2.4%	0.0%	0.0%	0.0%	0.0%	0.2%	19.2%	0.4%	0.7%	0.0%	4.5%	2.7%
Lakeside	7.3%	2.3%	3.9%	4.0%	4.0%	7.0%	4.5%	4.7%	5.1%	4.7%	4.1%	3.7%	5.7%	4.7%	4.5%
All other Centres, Shops & Stores:	2.9%	1.8%	2.5%	3.4%	3.0%	2.5%	15.8%	8.1%	8.8%	7.3%	6.0%	2.7%	6.2%	7.7%	5.9%
<b>SUB-TOTAL:</b>	<b>21.9%</b>	<b>20.1%</b>	<b>30.6%</b>	<b>30.9%</b>	<b>21.7%</b>	<b>33.3%</b>	<b>31.1%</b>	<b>33.3%</b>	<b>73.4%</b>	<b>52.7%</b>	<b>58.8%</b>	<b>26.3%</b>	<b>33.1%</b>	<b>64.6%</b>	<b>48.1%</b>
<b>TOTAL:</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Notes: <sup>1</sup> Excludes all 'null' responses (i.e. "don't know", "don't do", "nowhere else", etc.).



TABLE 2: 2019 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)

Excluding Special Forms of Trading

TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)	£8.7	£55.8	£81.5	£67.6	£67.6	£44.2	£6.9	£55.8	£247.2	£100.6	£131.9	£281.2	£106.9	£479.7	£867.8
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£2.60	£17.70	£16.29	£9.12	£11.65	£3.17	£0.06	£2.38	£11.04	£7.64	£0.97	£57.4	£5.6	£19.6	£82.6
Orchards Shopping Centre	£0.18	£1.70	£3.01	£0.62	£0.21	£0.10	£0.00	£0.12	£2.41	£0.44	£0.79	£5.7	£0.2	£3.7	£9.6
Prospect Place	£0.35	£5.66	£7.72	£5.30	£5.28	£1.06	£0.06	£1.83	£4.79	£5.59	£1.52	£24.3	£3.0	£11.9	£39.2
Priory Shopping Centre	£0.30	£1.12	£2.07	£0.67	£1.10	£0.00	£0.00	£0.15	£2.01	£0.50	£0.00	£5.3	£0.2	£2.5	£7.9
<b>SUB-TOTAL:</b>	<b>£3.4</b>	<b>£26.2</b>	<b>£29.1</b>	<b>£15.7</b>	<b>£18.2</b>	<b>£4.3</b>	<b>£0.1</b>	<b>£4.5</b>	<b>£20.3</b>	<b>£14.2</b>	<b>£3.3</b>	<b>£92.6</b>	<b>£8.9</b>	<b>£37.7</b>	<b>£139.3</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.03	£0.24	£0.11	£0.17	£0.04	£0.06	£0.00	£0.00	£0.00	£0.11	£0.00	£0.6	£0.1	£0.1	£0.8
Dartford Heath Retail Park	£0.00	£1.15	£0.67	£1.18	£0.64	£0.49	£0.00	£0.41	£2.06	£1.21	£0.35	£3.6	£0.9	£3.6	£8.2
Homebase / Argos	£0.12	£0.89	£1.20	£1.03	£0.75	£0.00	£0.07	£0.52	£0.65	£1.14	£0.00	£4.0	£0.6	£1.8	£6.4
Asda, Crossways Boulevard	£0.30	£1.47	£0.55	£0.15	£3.62	£4.34	£0.38	£0.56	£0.97	£0.00	£0.80	£6.1	£5.3	£1.8	£13.1
<b>SUB-TOTAL:</b>	<b>£0.4</b>	<b>£3.7</b>	<b>£2.5</b>	<b>£2.5</b>	<b>£5.0</b>	<b>£4.9</b>	<b>£0.4</b>	<b>£1.5</b>	<b>£3.7</b>	<b>£2.5</b>	<b>£1.1</b>	<b>£14.3</b>	<b>£6.8</b>	<b>£7.3</b>	<b>£28.4</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	£2.93	£13.11	£23.16	£25.76	£27.75	£18.86	£4.14	£28.03	£41.64	£29.56	£49.89	£92.7	£51.0	£121.1	£264.8
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.14	£0.03	£0.06	£0.07	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.3	£0.0	£0.1	£0.4
Temple Hill Square	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.5	£0.0	£0.0	£0.5
Dartford East	£0.01	£0.51	£0.22	£0.04	£0.39	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.2	£0.0	£0.0	£1.2
Dartford West	£0.00	£0.00	£1.20	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£1.2	£0.0	£0.0	£1.2
Longfield	£0.00	£0.07	£0.00	£0.15	£0.15	£0.00	£0.00	£2.80	£0.00	£0.34	£0.00	£0.4	£2.8	£0.3	£3.5
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.19	£1.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.2	£1.1	£0.0	£1.3
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.2</b>	<b>£1.4</b>	<b>£0.3</b>	<b>£0.8</b>	<b>£1.2</b>	<b>£0.0</b>	<b>£2.8</b>	<b>£0.1</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£3.7</b>	<b>£4.0</b>	<b>£0.4</b>	<b>£8.2</b>
<b>NEIGHBOURHOOD CENTRES:</b>	£0.00	£0.24	£0.02	£1.96	£0.37	£0.05	£0.00	£0.23	£0.00	£0.00	£0.00	£2.6	£0.3	£0.0	£2.9
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.39	£0.67	£0.18	£0.05	£0.13	£0.00	£0.16	£0.00	£1.1	£0.4	£0.2	£1.6
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.02	£0.30	£0.12	£0.04	£0.00	£0.00	£0.07	£0.00	£0.90	£0.00	£0.5	£0.1	£0.9	£1.5
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£0.5</b>	<b>£0.7</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£1.1</b>	<b>£0.0</b>	<b>£1.5</b>	<b>£0.4</b>	<b>£1.1</b>	<b>£3.0</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.22	£1.03	£1.27	£2.13	£0.14	£0.00	£0.31	£0.24	£77.01	£1.99	£0.00	£4.8	£0.5	£79.0	£84.3
Bromley	£0.00	£0.00	£0.00	£0.11	£0.03	£0.15	£0.00	£0.09	£0.18	£1.75	£0.00	£0.1	£0.2	£1.9	£2.3
Crayford	£0.54	£6.59	£17.24	£9.69	£8.40	£1.74	£0.07	£3.06	£46.92	£6.68	£3.69	£42.5	£4.9	£57.3	£104.6
Erith	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£20.42	£0.00	£0.18	£0.2	£0.0	£20.6	£20.8
Gravesend	£0.24	£0.94	£0.21	£0.24	£1.22	£8.12	£0.37	£7.41	£0.00	£0.37	£59.30	£2.9	£15.9	£59.7	£78.4
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.16	£0.54	£0.00	£0.50	£0.0	£0.3	£1.0	£1.4
Orpington	£0.01	£0.14	£0.63	£2.12	£0.14	£0.29	£0.00	£0.44	£1.68	£10.82	£0.07	£3.0	£0.7	£12.6	£16.4
Swanley	£0.00	£0.21	£0.17	£1.59	£0.00	£0.00	£0.00	£0.00	£0.38	£19.36	£0.58	£2.0	£0.0	£20.3	£22.3
Lakeside	£0.63	£1.30	£3.18	£2.69	£2.69	£3.11	£0.31	£2.60	£12.63	£4.71	£5.41	£10.5	£6.0	£22.7	£39.3
All other Centres, Shops & Stores:	£0.26	£1.02	£2.05	£2.33	£2.04	£1.13	£1.09	£4.53	£21.76	£7.32	£7.86	£7.7	£6.7	£36.9	£51.4
<b>SUB-TOTAL:</b>	<b>£1.9</b>	<b>£11.2</b>	<b>£25.0</b>	<b>£20.9</b>	<b>£14.7</b>	<b>£14.7</b>	<b>£2.2</b>	<b>£18.5</b>	<b>£181.5</b>	<b>£53.0</b>	<b>£77.6</b>	<b>£73.7</b>	<b>£35.4</b>	<b>£312.1</b>	<b>£421.2</b>
<b>TOTAL:</b>	<b>£8.7</b>	<b>£55.8</b>	<b>£81.5</b>	<b>£67.6</b>	<b>£67.6</b>	<b>£44.2</b>	<b>£6.9</b>	<b>£55.8</b>	<b>£247.2</b>	<b>£100.6</b>	<b>£131.9</b>	<b>£281.2</b>	<b>£106.9</b>	<b>£479.7</b>	<b>£867.8</b>

TABLE 3: 2020 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)

Excluding Special Forms of Trading

TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)	£8.9	£47.8	£69.9	£58.0	£58.4	£38.5	£10.9	£47.8	£214.1	£86.9	£114.1	£242.9	£97.2	£415.2	£755.3
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 12	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£2.64	£15.17	£13.96	£7.81	£10.08	£2.76	£0.10	£2.04	£9.57	£6.60	£0.84	£49.7	£4.9	£17.0	£71.6
Orchards Shopping Centre	£0.18	£1.45	£2.58	£0.53	£0.18	£0.09	£0.00	£0.10	£2.09	£0.38	£0.69	£4.9	£0.2	£3.2	£8.3
Prospect Place	£0.35	£4.85	£6.62	£4.54	£4.57	£0.93	£0.10	£1.57	£4.15	£4.83	£1.31	£20.9	£2.6	£10.3	£33.8
Priory Shopping Centre	£0.30	£0.96	£1.77	£0.58	£0.95	£0.00	£0.00	£0.13	£1.74	£0.43	£0.00	£4.6	£0.1	£2.2	£6.9
<b>SUB-TOTAL:</b>	<b>£3.5</b>	<b>£22.4</b>	<b>£24.9</b>	<b>£13.5</b>	<b>£15.8</b>	<b>£3.8</b>	<b>£0.2</b>	<b>£3.8</b>	<b>£17.5</b>	<b>£12.2</b>	<b>£2.8</b>	<b>£80.1</b>	<b>£7.8</b>	<b>£32.6</b>	<b>£120.5</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.03	£0.21	£0.10	£0.15	£0.03	£0.05	£0.00	£0.00	£0.00	£0.09	£0.00	£0.5	£0.1	£0.1	£0.7
Dartford Heath Retail Park	£0.00	£0.99	£0.57	£1.01	£0.55	£0.42	£0.00	£0.35	£1.78	£1.05	£0.30	£3.1	£0.8	£3.1	£7.0
Homebase / Argos	£0.12	£0.76	£1.03	£0.88	£0.65	£0.00	£0.11	£0.45	£0.57	£0.98	£0.00	£3.4	£0.6	£1.5	£5.5
Asda, Crossways Boulevard	£0.31	£1.26	£0.47	£0.13	£3.13	£3.78	£0.59	£0.48	£0.84	£0.00	£0.69	£5.3	£4.9	£1.5	£11.7
<b>SUB-TOTAL:</b>	<b>£0.5</b>	<b>£3.2</b>	<b>£2.2</b>	<b>£2.2</b>	<b>£4.4</b>	<b>£4.3</b>	<b>£0.7</b>	<b>£1.3</b>	<b>£3.2</b>	<b>£2.1</b>	<b>£1.0</b>	<b>£12.4</b>	<b>£6.2</b>	<b>£6.3</b>	<b>£24.9</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	£2.98	£11.24	£19.85	£22.08	£23.99	£16.42	£6.55	£24.02	£36.07	£25.53	£43.16	£80.1	£47.0	£104.8	£231.9
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.12	£0.03	£0.06	£0.06	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.3	£0.0	£0.1	£0.3
Temple Hill Square	£0.00	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.4	£0.0	£0.0	£0.4
Dartford East	£0.01	£0.44	£0.19	£0.03	£0.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.0	£0.0	£0.0	£1.0
Dartford West	£0.00	£0.00	£1.03	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£1.0	£0.0	£0.0	£1.1
Longfield	£0.00	£0.06	£0.00	£0.13	£0.13	£0.00	£0.00	£2.40	£0.00	£0.30	£0.00	£0.3	£2.4	£0.3	£3.0
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.16	£0.99	£0.00	£0.00	£0.00	£0.00	£0.00	£0.2	£1.0	£0.0	£1.2
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.1</b>	<b>£1.2</b>	<b>£0.2</b>	<b>£0.7</b>	<b>£1.0</b>	<b>£0.0</b>	<b>£2.4</b>	<b>£0.1</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£3.2</b>	<b>£3.4</b>	<b>£0.4</b>	<b>£7.0</b>
<b>NEIGHBOURHOOD CENTRES:</b>	£0.00	£0.20	£0.02	£1.68	£0.32	£0.04	£0.00	£0.19	£0.00	£0.00	£0.00	£2.2	£0.2	£0.0	£2.5
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.34	£0.58	£0.16	£0.07	£0.11	£0.00	£0.14	£0.00	£0.9	£0.3	£0.1	£1.4
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.02	£0.26	£0.10	£0.03	£0.00	£0.00	£0.06	£0.00	£0.78	£0.00	£0.4	£0.1	£0.8	£1.3
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£0.4</b>	<b>£0.6</b>	<b>£0.2</b>	<b>£0.1</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£0.9</b>	<b>£0.0</b>	<b>£1.3</b>	<b>£0.4</b>	<b>£0.9</b>	<b>£2.7</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.23	£0.89	£1.09	£1.82	£0.12	£0.00	£0.49	£0.21	£66.71	£1.72	£0.00	£4.1	£0.7	£68.4	£73.3
Bromley	£0.00	£0.00	£0.00	£0.10	£0.02	£0.13	£0.00	£0.08	£0.16	£1.51	£0.00	£0.1	£0.2	£1.7	£2.0
Crayford	£0.55	£5.65	£14.78	£8.31	£7.26	£1.52	£0.11	£2.62	£40.65	£5.77	£3.20	£36.5	£4.3	£49.6	£90.4
Erith	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£17.69	£0.00	£0.16	£0.2	£0.0	£17.9	£18.0
Gravesend	£0.25	£0.81	£0.18	£0.21	£1.05	£7.07	£0.59	£6.35	£0.00	£0.32	£51.31	£2.5	£14.0	£51.6	£68.1
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.14	£0.46	£0.00	£0.43	£0.0	£0.3	£0.9	£1.2
Orpington	£0.01	£0.12	£0.54	£1.82	£0.12	£0.26	£0.00	£0.38	£1.45	£9.35	£0.06	£2.6	£0.6	£10.9	£14.1
Swanley	£0.00	£0.18	£0.15	£1.36	£0.00	£0.00	£0.00	£0.00	£0.33	£16.72	£0.50	£1.7	£0.0	£17.6	£19.2
Lakeside	£0.64	£1.11	£2.72	£2.30	£2.32	£2.71	£0.49	£2.23	£10.94	£4.07	£4.68	£9.1	£5.4	£19.7	£34.2
All other Centres, Shops & Stores:	£0.26	£0.87	£1.76	£2.00	£1.77	£0.98	£1.72	£3.89	£18.85	£6.33	£6.80	£6.7	£6.6	£32.0	£45.2
<b>SUB-TOTAL:</b>	<b>£1.9</b>	<b>£9.6</b>	<b>£21.4</b>	<b>£17.9</b>	<b>£12.7</b>	<b>£12.8</b>	<b>£3.4</b>	<b>£15.9</b>	<b>£157.2</b>	<b>£45.8</b>	<b>£67.1</b>	<b>£63.6</b>	<b>£32.1</b>	<b>£270.2</b>	<b>£365.8</b>
<b>TOTAL:</b>	<b>£8.9</b>	<b>£47.8</b>	<b>£69.9</b>	<b>£58.0</b>	<b>£58.4</b>	<b>£38.5</b>	<b>£10.9</b>	<b>£47.8</b>	<b>£214.1</b>	<b>£86.9</b>	<b>£114.1</b>	<b>£242.9</b>	<b>£97.2</b>	<b>£415.2</b>	<b>£755.3</b>

TABLE 4: 2025 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)

Excluding Special Forms of Trading

TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)	£18.8	£56.8	£82.9	£68.8	£72.4	£49.2	£42.6	£56.8	£267.9	£106.8	£141.5	£299.7	£148.6	£516.2	£964.5
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 12	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£5.60	£18.03	£16.57	£9.27	£12.49	£3.53	£0.39	£2.42	£11.97	£8.11	£1.04	£62.0	£6.3	£21.1	£89.4
Orchards Shopping Centre	£0.38	£1.73	£3.07	£0.63	£0.22	£0.12	£0.00	£0.12	£2.61	£0.47	£0.85	£6.0	£0.2	£3.9	£10.2
Prospect Place	£0.75	£5.77	£7.86	£5.39	£5.66	£1.18	£0.39	£1.86	£5.19	£5.94	£1.63	£25.4	£3.4	£12.8	£41.6
Priory Shopping Centre	£0.64	£1.14	£2.10	£0.68	£1.17	£0.00	£0.00	£0.16	£2.18	£0.53	£0.00	£5.7	£0.2	£2.7	£8.6
<b>SUB-TOTAL:</b>	<b>£7.4</b>	<b>£26.7</b>	<b>£29.6</b>	<b>£16.0</b>	<b>£19.5</b>	<b>£4.8</b>	<b>£0.8</b>	<b>£4.6</b>	<b>£22.0</b>	<b>£15.1</b>	<b>£3.5</b>	<b>£99.2</b>	<b>£10.2</b>	<b>£40.5</b>	<b>£149.9</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.06	£0.24	£0.12	£0.17	£0.04	£0.07	£0.00	£0.00	£0.00	£0.11	£0.00	£0.6	£0.1	£0.1	£0.8
Dartford Heath Retail Park	£0.00	£1.17	£0.68	£1.20	£0.69	£0.54	£0.00	£0.42	£2.23	£1.29	£0.37	£3.7	£1.0	£3.9	£8.6
Homebase / Argos	£0.26	£0.90	£1.22	£1.05	£0.81	£0.00	£0.44	£0.53	£0.71	£1.21	£0.00	£4.2	£1.0	£1.9	£7.1
Asda, Crossways Boulevard	£0.65	£1.49	£0.56	£0.15	£3.87	£4.83	£2.31	£0.57	£1.05	£0.00	£0.86	£6.7	£7.7	£1.9	£16.3
<b>SUB-TOTAL:</b>	<b>£1.0</b>	<b>£3.8</b>	<b>£2.6</b>	<b>£2.6</b>	<b>£5.4</b>	<b>£5.4</b>	<b>£2.8</b>	<b>£1.5</b>	<b>£4.0</b>	<b>£2.6</b>	<b>£1.2</b>	<b>£15.3</b>	<b>£9.7</b>	<b>£7.8</b>	<b>£32.9</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	£6.33	£13.36	£23.55	£26.20	£29.74	£20.98	£25.49	£28.54	£45.12	£31.39	£53.52	£99.2	£75.0	£130.0	£304.2
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.15	£0.03	£0.07	£0.08	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.3	£0.0	£0.1	£0.4
Temple Hill Square	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.5	£0.0	£0.0	£0.5
Dartford East	£0.01	£0.52	£0.22	£0.04	£0.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.2	£0.0	£0.0	£1.2
Dartford West	£0.00	£0.00	£1.22	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£1.2	£0.0	£0.0	£1.3
Longfield	£0.00	£0.07	£0.00	£0.15	£0.16	£0.00	£0.00	£2.85	£0.00	£0.37	£0.00	£0.4	£2.9	£0.4	£3.6
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.20	£1.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.2	£1.3	£0.0	£1.5
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.3</b>	<b>£1.5</b>	<b>£0.3</b>	<b>£0.9</b>	<b>£1.3</b>	<b>£0.0</b>	<b>£2.9</b>	<b>£0.1</b>	<b>£0.4</b>	<b>£0.0</b>	<b>£3.9</b>	<b>£4.2</b>	<b>£0.5</b>	<b>£8.5</b>
<b>NEIGHBOURHOOD CENTRES:</b>	£0.00	£0.24	£0.02	£2.00	£0.39	£0.05	£0.00	£0.23	£0.00	£0.00	£0.00	£2.7	£0.3	£0.0	£2.9
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.40	£0.71	£0.20	£0.29	£0.13	£0.00	£0.17	£0.00	£1.1	£0.6	£0.2	£1.9
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.02	£0.31	£0.12	£0.04	£0.00	£0.00	£0.07	£0.00	£0.96	£0.00	£0.5	£0.1	£1.0	£1.5
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£0.5</b>	<b>£0.8</b>	<b>£0.2</b>	<b>£0.3</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£1.1</b>	<b>£0.0</b>	<b>£1.6</b>	<b>£0.7</b>	<b>£1.1</b>	<b>£3.4</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.48	£1.05	£1.29	£2.16	£0.15	£0.00	£1.90	£0.24	£83.46	£2.12	£0.00	£5.1	£2.1	£85.6	£92.9
Bromley	£0.00	£0.00	£0.00	£0.11	£0.03	£0.17	£0.00	£0.09	£0.19	£1.85	£0.00	£0.1	£0.3	£2.0	£2.4
Crayford	£1.17	£6.72	£17.54	£9.86	£9.00	£1.94	£0.43	£3.12	£50.85	£7.09	£3.96	£44.3	£5.5	£61.9	£111.7
Erith	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£22.14	£0.00	£0.20	£0.2	£0.0	£22.3	£22.6
Gravesend	£0.52	£0.96	£0.21	£0.25	£1.31	£9.03	£2.29	£7.54	£0.00	£0.40	£63.61	£3.2	£18.9	£64.0	£86.1
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.16	£0.58	£0.00	£0.54	£0.0	£0.4	£1.1	£1.5
Orpington	£0.02	£0.14	£0.64	£2.16	£0.15	£0.33	£0.00	£0.45	£1.82	£11.49	£0.07	£3.1	£0.8	£13.4	£17.3
Swanley	£0.00	£0.21	£0.18	£1.62	£0.00	£0.00	£0.00	£0.00	£0.41	£20.56	£0.63	£2.0	£0.0	£21.6	£23.6
Lakeside	£1.36	£1.32	£3.23	£2.73	£2.88	£3.46	£1.92	£2.65	£13.69	£5.00	£5.80	£11.5	£8.0	£24.5	£44.0
All other Centres, Shops & Stores:	£0.55	£1.04	£2.09	£2.37	£2.19	£1.25	£6.72	£4.62	£23.58	£7.78	£8.43	£8.2	£12.6	£39.8	£60.6
<b>SUB-TOTAL:</b>	<b>£4.1</b>	<b>£11.4</b>	<b>£25.4</b>	<b>£21.3</b>	<b>£15.7</b>	<b>£16.4</b>	<b>£13.3</b>	<b>£18.9</b>	<b>£196.7</b>	<b>£56.3</b>	<b>£83.2</b>	<b>£77.9</b>	<b>£48.5</b>	<b>£336.3</b>	<b>£462.7</b>
<b>TOTAL:</b>	<b>£18.8</b>	<b>£56.8</b>	<b>£82.9</b>	<b>£68.8</b>	<b>£72.4</b>	<b>£49.2</b>	<b>£42.6</b>	<b>£56.8</b>	<b>£267.9</b>	<b>£106.8</b>	<b>£141.5</b>	<b>£299.7</b>	<b>£148.6</b>	<b>£516.2</b>	<b>£964.5</b>

TABLE 5: 2030 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)

Excluding Special Forms of Trading

TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)	£24.7	£64.4	£93.6	£77.8	£84.3	£56.0	£81.2	£64.3	£316.3	£123.9	£165.8	£344.8	£201.5	£606.1	£1,152.3
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 12	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£7.35	£20.43	£18.70	£10.49	£14.54	£4.02	£0.75	£2.74	£14.13	£9.40	£1.22	£71.5	£7.5	£24.8	£103.8
Orchards Shopping Centre	£0.50	£1.96	£3.46	£0.71	£0.26	£0.13	£0.00	£0.14	£3.09	£0.55	£1.00	£6.9	£0.3	£4.6	£11.8
Prospect Place	£0.98	£6.54	£8.87	£6.10	£6.59	£1.35	£0.75	£2.11	£6.13	£6.89	£1.91	£29.1	£4.2	£14.9	£48.2
Priory Shopping Centre	£0.85	£1.29	£2.37	£0.77	£1.37	£0.00	£0.00	£0.18	£2.58	£0.62	£0.00	£6.7	£0.2	£3.2	£10.0
<b>SUB-TOTAL:</b>	<b>£9.7</b>	<b>£30.2</b>	<b>£33.4</b>	<b>£18.1</b>	<b>£22.8</b>	<b>£5.5</b>	<b>£1.5</b>	<b>£5.2</b>	<b>£25.9</b>	<b>£17.5</b>	<b>£4.1</b>	<b>£114.1</b>	<b>£12.2</b>	<b>£47.5</b>	<b>£173.8</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.08	£0.28	£0.13	£0.20	£0.04	£0.08	£0.00	£0.00	£0.00	£0.13	£0.00	£0.7	£0.1	£0.1	£0.9
Dartford Heath Retail Park	£0.00	£1.33	£0.77	£1.36	£0.80	£0.62	£0.00	£0.47	£2.64	£1.49	£0.44	£4.3	£1.1	£4.6	£9.9
Homebase / Argos	£0.34	£1.02	£1.38	£1.19	£0.94	£0.00	£0.84	£0.60	£0.84	£1.40	£0.00	£4.9	£1.4	£2.2	£8.5
Asda, Crossways Boulevard	£0.85	£1.69	£0.63	£0.17	£4.51	£5.50	£4.42	£0.65	£1.24	£0.00	£1.01	£7.9	£10.6	£2.2	£20.7
<b>SUB-TOTAL:</b>	<b>£1.3</b>	<b>£4.3</b>	<b>£2.9</b>	<b>£2.9</b>	<b>£6.3</b>	<b>£6.2</b>	<b>£5.3</b>	<b>£1.7</b>	<b>£4.7</b>	<b>£3.0</b>	<b>£1.4</b>	<b>£17.7</b>	<b>£13.2</b>	<b>£9.2</b>	<b>£40.1</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	£8.31	£15.14	£26.59	£29.64	£34.62	£23.89	£48.62	£32.30	£53.28	£36.41	£62.71	£114.3	£104.8	£152.4	£371.5
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.17	£0.04	£0.07	£0.09	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.4	£0.0	£0.1	£0.5
Temple Hill Square	£0.00	£0.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.6	£0.0	£0.0	£0.6
Dartford East	£0.02	£0.59	£0.25	£0.04	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.4	£0.0	£0.0	£1.4
Dartford West	£0.00	£0.00	£1.37	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£1.4	£0.0	£0.0	£1.4
Longfield	£0.00	£0.08	£0.00	£0.17	£0.19	£0.00	£0.00	£3.23	£0.00	£0.42	£0.00	£0.4	£3.2	£0.4	£4.1
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.23	£1.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.2	£1.4	£0.0	£1.7
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.4</b>	<b>£1.7</b>	<b>£0.3</b>	<b>£1.0</b>	<b>£1.5</b>	<b>£0.0</b>	<b>£3.2</b>	<b>£0.1</b>	<b>£0.4</b>	<b>£0.0</b>	<b>£4.4</b>	<b>£4.7</b>	<b>£0.5</b>	<b>£9.7</b>
<b>NEIGHBOURHOOD CENTRES:</b>	£0.00	£0.27	£0.03	£2.26	£0.46	£0.06	£0.00	£0.26	£0.00	£0.00	£0.00	£3.0	£0.3	£0.0	£3.3
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.45	£0.83	£0.23	£0.54	£0.15	£0.00	£0.20	£0.00	£1.3	£0.9	£0.2	£2.4
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.02	£0.35	£0.14	£0.04	£0.00	£0.00	£0.08	£0.00	£1.11	£0.00	£0.6	£0.1	£1.1	£1.7
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.3</b>	<b>£0.6</b>	<b>£0.9</b>	<b>£0.2</b>	<b>£0.5</b>	<b>£0.2</b>	<b>£0.0</b>	<b>£1.3</b>	<b>£0.0</b>	<b>£1.8</b>	<b>£1.0</b>	<b>£1.3</b>	<b>£4.2</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.63	£1.19	£1.46	£2.45	£0.18	£0.00	£3.63	£0.28	£98.55	£2.46	£0.00	£5.9	£3.9	£101.0	£110.8
Bromley	£0.00	£0.00	£0.00	£0.13	£0.03	£0.19	£0.00	£0.11	£0.23	£2.15	£0.00	£0.2	£0.3	£2.4	£2.8
Crayford	£1.54	£7.61	£19.80	£11.15	£10.48	£2.21	£0.82	£3.53	£60.05	£8.22	£4.64	£50.6	£6.6	£72.9	£130.0
Erith	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£26.14	£0.00	£0.23	£0.3	£0.0	£26.4	£26.6
Gravesend	£0.69	£1.09	£0.24	£0.28	£1.52	£10.28	£4.37	£8.54	£0.00	£0.46	£74.54	£3.8	£23.2	£75.0	£102.0
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£0.00	£0.18	£0.69	£0.00	£0.63	£0.0	£0.4	£1.3	£1.7
Orpington	£0.03	£0.16	£0.72	£2.44	£0.18	£0.37	£0.00	£0.51	£2.15	£13.33	£0.09	£3.5	£0.9	£15.6	£20.0
Swanley	£0.00	£0.24	£0.20	£1.83	£0.00	£0.00	£0.00	£0.00	£0.49	£23.85	£0.73	£2.3	£0.0	£25.1	£27.3
Lakeside	£1.79	£1.50	£3.65	£3.09	£3.35	£3.94	£3.66	£3.00	£16.16	£5.80	£6.80	£13.4	£10.6	£28.8	£52.7
All other Centres, Shops & Stores:	£0.73	£1.17	£2.36	£2.68	£2.55	£1.43	£12.81	£5.22	£27.84	£9.02	£9.88	£9.5	£19.5	£46.7	£75.7
<b>SUB-TOTAL:</b>	<b>£5.4</b>	<b>£13.0</b>	<b>£28.7</b>	<b>£24.1</b>	<b>£18.3</b>	<b>£18.7</b>	<b>£25.3</b>	<b>£21.4</b>	<b>£232.3</b>	<b>£65.3</b>	<b>£97.5</b>	<b>£89.4</b>	<b>£65.3</b>	<b>£395.1</b>	<b>£549.8</b>
<b>TOTAL:</b>	<b>£24.7</b>	<b>£64.4</b>	<b>£93.6</b>	<b>£77.8</b>	<b>£84.3</b>	<b>£56.0</b>	<b>£81.2</b>	<b>£64.3</b>	<b>£316.3</b>	<b>£123.9</b>	<b>£165.8</b>	<b>£344.8</b>	<b>£201.5</b>	<b>£606.1</b>	<b>£1,152.3</b>

TABLE 6: 2035 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)

Excluding Special Forms of Trading

TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)	£32.1	£73.8	£107.0	£89.2	£99.2	£64.6	£130.0	£73.6	£375.9	£145.4	£196.4	£401.3	£268.2	£717.7	£1,387.2
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 12	1-5	6-8	9-11	TOTAL
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£9.55	£23.44	£21.38	£12.02	£17.11	£4.63	£1.20	£3.14	£16.79	£11.03	£1.44	£83.5	£9.0	£29.3	£121.7
Orchards Shopping Centre	£0.65	£2.25	£3.96	£0.82	£0.30	£0.15	£0.00	£0.16	£3.67	£0.64	£1.18	£8.0	£0.3	£5.5	£13.8
Prospect Place	£1.28	£7.50	£10.14	£6.98	£7.75	£1.55	£1.20	£2.42	£7.28	£8.08	£2.26	£33.7	£5.2	£17.6	£56.5
Priory Shopping Centre	£1.10	£1.48	£2.71	£0.89	£1.61	£0.00	£0.00	£0.20	£3.06	£0.73	£0.00	£7.8	£0.2	£3.8	£11.8
<b>SUB-TOTAL:</b>	<b>£12.6</b>	<b>£34.7</b>	<b>£38.2</b>	<b>£20.7</b>	<b>£26.8</b>	<b>£6.3</b>	<b>£2.4</b>	<b>£5.9</b>	<b>£30.8</b>	<b>£20.5</b>	<b>£4.9</b>	<b>£132.9</b>	<b>£14.7</b>	<b>£56.2</b>	<b>£203.8</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.11	£0.32	£0.15	£0.22	£0.05	£0.09	£0.00	£0.00	£0.00	£0.16	£0.00	£0.8	£0.1	£0.2	£1.1
Dartford Heath Retail Park	£0.00	£1.52	£0.88	£1.56	£0.94	£0.71	£0.00	£0.54	£3.13	£1.75	£0.52	£4.9	£1.3	£5.4	£11.6
Homebase / Argos	£0.44	£1.17	£1.57	£1.36	£1.10	£0.00	£1.34	£0.69	£0.99	£1.64	£0.00	£5.7	£2.0	£2.6	£10.3
Asda, Crossways Boulevard	£1.11	£1.94	£0.72	£0.20	£5.31	£6.34	£7.07	£0.74	£1.47	£0.00	£1.19	£9.3	£14.1	£2.7	£26.1
<b>SUB-TOTAL:</b>	<b>£1.7</b>	<b>£5.0</b>	<b>£3.3</b>	<b>£3.3</b>	<b>£7.4</b>	<b>£7.1</b>	<b>£8.4</b>	<b>£2.0</b>	<b>£5.6</b>	<b>£3.6</b>	<b>£1.7</b>	<b>£20.7</b>	<b>£17.5</b>	<b>£10.9</b>	<b>£49.1</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	£10.80	£17.36	£30.40	£33.96	£40.74	£27.54	£77.83	£37.01	£63.32	£42.71	£74.28	£133.3	£142.4	£180.3	£456.0
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.19	£0.04	£0.08	£0.10	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.4	£0.0	£0.1	£0.6
Temple Hill Square	£0.00	£0.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.7	£0.0	£0.0	£0.7
Dartford East	£0.02	£0.68	£0.29	£0.05	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.6	£0.0	£0.0	£1.6
Dartford West	£0.00	£0.00	£1.57	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£1.6	£0.1	£0.0	£1.6
Longfield	£0.00	£0.09	£0.00	£0.20	£0.22	£0.00	£0.00	£3.70	£0.00	£0.50	£0.00	£0.5	£3.7	£0.5	£4.7
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.27	£1.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.3	£1.7	£0.0	£1.9
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.7</b>	<b>£1.9</b>	<b>£0.3</b>	<b>£1.2</b>	<b>£1.7</b>	<b>£0.0</b>	<b>£3.7</b>	<b>£0.1</b>	<b>£0.5</b>	<b>£0.0</b>	<b>£5.1</b>	<b>£5.4</b>	<b>£0.6</b>	<b>£11.1</b>
<b>NEIGHBOURHOOD CENTRES:</b>	£0.00	£0.31	£0.03	£2.59	£0.54	£0.07	£0.00	£0.30	£0.00	£0.00	£0.00	£3.5	£0.4	£0.0	£3.8
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.52	£0.98	£0.27	£0.87	£0.17	£0.00	£0.24	£0.00	£1.5	£1.3	£0.2	£3.1
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.03	£0.40	£0.16	£0.05	£0.00	£0.00	£0.10	£0.00	£1.30	£0.00	£0.6	£0.1	£1.3	£2.0
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.7</b>	<b>£1.0</b>	<b>£0.3</b>	<b>£0.9</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£1.5</b>	<b>£0.0</b>	<b>£2.1</b>	<b>£1.4</b>	<b>£1.5</b>	<b>£5.1</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.82	£1.37	£1.67	£2.80	£0.21	£0.00	£5.81	£0.32	£117.11	£2.88	£0.00	£6.9	£6.1	£120.0	£133.0
Bromley	£0.00	£0.00	£0.00	£0.15	£0.04	£0.22	£0.00	£0.12	£0.27	£2.52	£0.00	£0.2	£0.3	£2.8	£3.3
Crayford	£2.00	£8.73	£22.63	£12.77	£12.33	£2.54	£1.31	£4.04	£71.36	£9.64	£5.50	£58.5	£7.9	£86.5	£152.9
Erith	£0.00	£0.00	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	£31.06	£0.00	£0.27	£0.3	£0.0	£31.3	£31.6
Gravesend	£0.89	£1.24	£0.27	£0.32	£1.79	£11.86	£7.00	£9.78	£0.00	£0.54	£88.30	£4.5	£28.6	£88.8	£122.0
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.00	£0.21	£0.82	£0.00	£0.74	£0.0	£0.5	£1.6	£2.0
Orpington	£0.04	£0.18	£0.83	£2.80	£0.21	£0.43	£0.00	£0.59	£2.55	£15.64	£0.10	£4.1	£1.0	£18.3	£23.4
Swanley	£0.00	£0.27	£0.23	£2.10	£0.00	£0.00	£0.00	£0.00	£0.58	£27.98	£0.87	£2.6	£0.0	£29.4	£32.0
Lakeside	£2.33	£1.72	£4.17	£3.54	£3.95	£4.54	£5.85	£3.44	£19.21	£6.80	£8.05	£15.7	£13.8	£34.1	£63.6
All other Centres, Shops & Stores:	£0.95	£1.35	£2.69	£3.07	£3.00	£1.64	£20.51	£5.99	£33.08	£10.58	£11.71	£11.1	£28.1	£55.4	£94.6
<b>SUB-TOTAL:</b>	<b>£7.0</b>	<b>£14.9</b>	<b>£32.8</b>	<b>£27.6</b>	<b>£21.5</b>	<b>£21.5</b>	<b>£40.5</b>	<b>£24.5</b>	<b>£276.0</b>	<b>£76.6</b>	<b>£115.5</b>	<b>£103.7</b>	<b>£86.5</b>	<b>£468.2</b>	<b>£658.4</b>
<b>TOTAL:</b>	<b>£32.1</b>	<b>£73.8</b>	<b>£107.0</b>	<b>£89.2</b>	<b>£99.2</b>	<b>£64.6</b>	<b>£130.0</b>	<b>£73.6</b>	<b>£375.9</b>	<b>£145.4</b>	<b>£196.4</b>	<b>£401.3</b>	<b>£268.2</b>	<b>£717.7</b>	<b>£1,387.2</b>

**TABLE 7: 2036 - ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (£M) (2017 PRICES)**

*Excluding Special Forms of Trading*

<b>TOTAL AVAILABLE EXPENDITURE (£M) (excl SFT)</b>	<b>£33.8</b>	<b>£76.0</b>	<b>£110.1</b>	<b>£91.8</b>	<b>£102.6</b>	<b>£66.6</b>	<b>£141.3</b>	<b>£75.8</b>	<b>£389.6</b>	<b>£150.2</b>	<b>£203.6</b>	<b>£414.4</b>	<b>£283.7</b>	<b>£743.4</b>	<b>£1,441.5</b>
	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Zone 10</b>	<b>Zone 12</b>	<b>1-5</b>	<b>6-8</b>	<b>9-11</b>	<b>TOTAL</b>
<b>DARTFORD TOWN CENTRE:</b>															
All Town Centre Shops/Stores	£10.07	£24.14	£22.00	£12.37	£17.71	£4.78	£1.31	£3.23	£17.40	£11.40	£1.50	£86.3	£9.3	£30.3	£125.9
Orchards Shopping Centre	£0.69	£2.31	£4.07	£0.84	£0.31	£0.16	£0.00	£0.16	£3.80	£0.66	£1.23	£8.2	£0.3	£5.7	£14.2
Prospect Place	£1.35	£7.72	£10.43	£7.19	£8.02	£1.60	£1.31	£2.49	£7.55	£8.35	£2.34	£34.7	£5.4	£18.2	£58.4
Priory Shopping Centre	£1.16	£1.52	£2.79	£0.91	£1.66	£0.00	£0.00	£0.21	£3.17	£0.75	£0.00	£8.1	£0.2	£3.9	£12.2
<b>SUB-TOTAL:</b>	<b>£13.3</b>	<b>£35.7</b>	<b>£39.3</b>	<b>£21.3</b>	<b>£27.7</b>	<b>£6.5</b>	<b>£2.6</b>	<b>£6.1</b>	<b>£31.9</b>	<b>£21.2</b>	<b>£5.1</b>	<b>£137.3</b>	<b>£15.2</b>	<b>£58.2</b>	<b>£210.7</b>
<b>DARTFORD OUT OF CENTRE:</b>															
Wickes	£0.11	£0.33	£0.15	£0.23	£0.05	£0.09	£0.00	£0.00	£0.00	£0.16	£0.00	£0.9	£0.1	£0.2	£1.1
Dartford Heath Retail Park	£0.00	£1.57	£0.90	£1.60	£0.97	£0.73	£0.00	£0.56	£3.25	£1.81	£0.53	£5.1	£1.3	£5.6	£11.9
Homebase / Argos	£0.46	£1.21	£1.62	£1.40	£1.14	£0.00	£1.46	£0.71	£1.03	£1.70	£0.00	£5.8	£2.2	£2.7	£10.7
Asda, Crossways Boulevard	£1.17	£2.00	£0.74	£0.20	£5.49	£6.54	£7.68	£0.76	£1.52	£0.00	£1.24	£9.6	£15.0	£2.8	£27.3
<b>SUB-TOTAL:</b>	<b>£1.7</b>	<b>£5.1</b>	<b>£3.4</b>	<b>£3.4</b>	<b>£7.7</b>	<b>£7.4</b>	<b>£9.1</b>	<b>£2.0</b>	<b>£5.8</b>	<b>£3.7</b>	<b>£1.8</b>	<b>£21.4</b>	<b>£18.5</b>	<b>£11.2</b>	<b>£51.1</b>
<b>BLUEWATER SHOPPING CENTRE:</b>	<b>£11.38</b>	<b>£17.88</b>	<b>£31.28</b>	<b>£34.96</b>	<b>£42.16</b>	<b>£28.39</b>	<b>£84.61</b>	<b>£38.10</b>	<b>£65.62</b>	<b>£44.14</b>	<b>£76.98</b>	<b>£137.7</b>	<b>£151.1</b>	<b>£186.7</b>	<b>£475.5</b>
<b>DISTRICT CENTRES:</b>															
Hawley Road/Lowfield Street	£0.00	£0.20	£0.04	£0.09	£0.11	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.4	£0.0	£0.1	£0.6
Temple Hill Square	£0.00	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.7	£0.0	£0.0	£0.7
Dartford East	£0.03	£0.70	£0.30	£0.05	£0.59	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.7	£0.0	£0.0	£1.7
Dartford West	£0.00	£0.00	£1.62	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£1.6	£0.1	£0.0	£1.7
Longfield	£0.00	£0.09	£0.00	£0.20	£0.23	£0.00	£0.00	£3.81	£0.00	£0.51	£0.00	£0.5	£3.8	£0.5	£4.8
Swanscombe	£0.00	£0.00	£0.00	£0.00	£0.28	£1.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.3	£1.7	£0.0	£2.0
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£1.7</b>	<b>£2.0</b>	<b>£0.3</b>	<b>£1.2</b>	<b>£1.8</b>	<b>£0.0</b>	<b>£3.8</b>	<b>£0.1</b>	<b>£0.5</b>	<b>£0.0</b>	<b>£5.2</b>	<b>£5.6</b>	<b>£0.7</b>	<b>£11.5</b>
<b>NEIGHBOURHOOD CENTRES:</b>	<b>£0.00</b>	<b>£0.32</b>	<b>£0.03</b>	<b>£2.66</b>	<b>£0.56</b>	<b>£0.07</b>	<b>£0.00</b>	<b>£0.31</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£3.6</b>	<b>£0.4</b>	<b>£0.0</b>	<b>£4.0</b>
<b>OTHER PARADES, SHOPS AND STORES:</b>															
Greenhithe Village Centre	£0.00	£0.00	£0.00	£0.54	£1.01	£0.28	£0.95	£0.18	£0.00	£0.25	£0.00	£1.5	£1.4	£0.2	£3.2
Ebbsfleet Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.0	£0.0	£0.0	£0.0
All other Parades, Shops & Stores:	£0.00	£0.03	£0.41	£0.17	£0.05	£0.00	£0.00	£0.10	£0.00	£1.34	£0.00	£0.7	£0.1	£1.3	£2.1
<b>SUB-TOTAL:</b>	<b>£0.0</b>	<b>£0.0</b>	<b>£0.4</b>	<b>£0.7</b>	<b>£1.1</b>	<b>£0.3</b>	<b>£0.9</b>	<b>£0.3</b>	<b>£0.0</b>	<b>£1.6</b>	<b>£0.0</b>	<b>£2.2</b>	<b>£1.5</b>	<b>£1.6</b>	<b>£5.3</b>
<b>MAJOR CENTRES/STORES OUTSIDE BOROUGH:</b>															
Bexleyheath	£0.87	£1.41	£1.71	£2.89	£0.21	£0.00	£6.32	£0.33	£121.37	£2.98	£0.00	£7.1	£6.6	£124.3	£138.1
Bromley	£0.00	£0.00	£0.00	£0.15	£0.04	£0.22	£0.00	£0.13	£0.28	£2.61	£0.00	£0.2	£0.4	£2.9	£3.4
Crayford	£2.11	£8.99	£23.29	£13.15	£12.76	£2.62	£1.43	£4.16	£73.96	£9.97	£5.70	£60.3	£8.2	£89.6	£158.1
Erith	£0.00	£0.00	£0.30	£0.00	£0.00	£0.00	£0.00	£0.00	£32.19	£0.00	£0.28	£0.3	£0.0	£32.5	£32.8
Gravesend	£0.94	£1.28	£0.28	£0.33	£1.85	£12.22	£7.61	£10.07	£0.00	£0.56	£91.50	£4.7	£29.9	£92.1	£126.6
Northfleet	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£0.00	£0.22	£0.85	£0.00	£0.77	£0.0	£0.5	£1.6	£2.1
Orpington	£0.04	£0.19	£0.85	£2.88	£0.21	£0.44	£0.00	£0.60	£2.64	£16.16	£0.11	£4.2	£1.0	£18.9	£24.1
Swanley	£0.00	£0.28	£0.23	£2.16	£0.00	£0.00	£0.00	£0.60	£28.91	£0.90	£0.00	£2.7	£0.0	£30.4	£33.1
Lakeside	£2.45	£1.77	£4.29	£3.65	£4.08	£4.68	£6.36	£3.54	£19.91	£7.03	£8.35	£16.2	£14.6	£35.3	£66.1
All other Centres, Shops & Stores:	£1.00	£1.39	£2.77	£3.16	£3.11	£1.70	£22.29	£6.16	£34.29	£10.94	£12.13	£11.4	£30.2	£57.4	£98.9
<b>SUB-TOTAL:</b>	<b>£7.4</b>	<b>£15.3</b>	<b>£33.7</b>	<b>£28.4</b>	<b>£22.3</b>	<b>£22.2</b>	<b>£44.0</b>	<b>£25.2</b>	<b>£286.1</b>	<b>£79.1</b>	<b>£119.7</b>	<b>£107.1</b>	<b>£91.4</b>	<b>£485.0</b>	<b>£683.4</b>
<b>TOTAL:</b>	<b>£33.8</b>	<b>£76.0</b>	<b>£110.1</b>	<b>£91.8</b>	<b>£102.6</b>	<b>£66.6</b>	<b>£141.3</b>	<b>£75.8</b>	<b>£389.6</b>	<b>£150.2</b>	<b>£203.6</b>	<b>£414.4</b>	<b>£283.7</b>	<b>£743.4</b>	<b>£1,441.5</b>

# APPENDIX A7

**TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON (CONSTANT) MARKET SHARE ANALYSIS (£m)**

*Excluding SFT & 'inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£86.7	£93.3	£94.0	£97.5	£101.4	£102.1
BLUEWATER:	£14.6	£15.9	£17.2	£19.2	£21.3	£21.7
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£1.8	£1.9	£1.8	£1.8	£1.8	£1.8
Temple Hill Square	£1.6	£1.7	£1.7	£1.8	£1.8	£1.9
Dartford East	£2.4	£2.5	£2.5	£2.5	£2.6	£2.6
Dartford West	£2.2	£2.5	£2.7	£3.0	£3.4	£3.4
Longfield	£11.6	£12.3	£11.7	£11.8	£12.0	£12.0
Swanscombe	£1.8	£2.1	£2.6	£3.1	£3.6	£3.7
NEIGHBOURHOOD CENTRES:	£13.8	£14.9	£15.3	£16.5	£17.8	£18.0
OTHER SMALLER STORES IN BOROUGH:	£4.1	£4.8	£6.5	£8.2	£9.9	£10.2
ALL OUT OF CENTRE STORES IN BOROUGH:	£43.4	£47.2	£50.2	£54.5	£59.1	£59.9
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£183.9</b>	<b>£199.0</b>	<b>£206.1</b>	<b>£219.8</b>	<b>£234.6</b>	<b>£237.4</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£560.2</b>	<b>£603.5</b>	<b>£612.0</b>	<b>£648.2</b>	<b>£686.9</b>	<b>£694.2</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL CONVENIENCE GOODS FLOORSPACE IN DARTFORD BOROUGH - TOTAL TURNOVER**

*Including 'inflow' from outside Study Area*

	Estimated 'inflow'	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	5%	£91.3	£98.2	£98.9	£102.6	£106.7	£107.5
BLUEWATER:	70%	£48.6	£53.1	£57.4	£64.1	£71.0	£72.4
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	2%	£1.8	£1.9	£1.8	£1.8	£1.9	£1.9
Temple Hill Square	2%	£1.6	£1.7	£1.8	£1.8	£1.9	£1.9
Dartford East	2%	£2.4	£2.6	£2.5	£2.6	£2.7	£2.7
Dartford West	2%	£2.3	£2.5	£2.7	£3.1	£3.4	£3.5
Longfield	50%	£23.1	£24.6	£23.4	£23.6	£23.9	£24.0
Swanscombe	15%	£2.1	£2.4	£3.0	£3.6	£4.2	£4.3
NEIGHBOURHOOD CENTRES:	0%	£13.8	£14.9	£15.3	£16.5	£17.8	£18.0
OTHER SMALLER STORES IN BOROUGH:	0%	£4.1	£4.8	£6.5	£8.2	£9.9	£10.2
ALL OUT OF CENTRE STORES IN BOROUGH:	15%	£51.1	£55.6	£59.0	£64.1	£69.5	£70.5
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£242.2</b>	<b>£262.3</b>	<b>£272.4</b>	<b>£292.0</b>	<b>£312.8</b>	<b>£316.8</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.



**TABLE 3: DARTFORD BOROUGH - CONVENIENCE GOODS CAPACITY - EXCLUDING RETAIL FLOORSPACE COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£262.3	£272.4	£292.0	£312.8	£316.8
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£262.3	£253.7	£257.5	£261.4	£262.2
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£18.7	£34.4	£51.4	£54.6
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
<b>STEP 5:</b> <b>NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):</b>	-	<b>£18.7</b>	<b>£34.4</b>	<b>£51.4</b>	<b>£54.6</b>
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£9,673	£9,819	£9,967	£10,118
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>1,934</b>	<b>3,507</b>	<b>5,159</b>	<b>5,401</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		2,763	5,010	7,370	7,716

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

STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.

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

STEPS 4/5: Retail commitments have not been factored into the retail capacity.

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an average sales performance for the 'top 6' grocers (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and other supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

# APPENDIX A8

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)**  
*Excluding SFT & 'Inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£139.3	£120.5	£149.9	£173.8	£203.8	£210.7
BLUEWATER	£264.8	£231.9	£304.2	£371.5	£456.0	£475.5
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£0.4	£0.3	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	£0.5	£0.4	£0.5	£0.6	£0.7	£0.7
Dartford East	£1.2	£1.0	£1.2	£1.4	£1.6	£1.7
Dartford West	£1.2	£1.1	£1.3	£1.4	£1.6	£1.7
Longfield	£3.5	£3.0	£3.6	£4.1	£4.7	£4.8
Swanscombe	£1.3	£1.2	£1.5	£1.7	£1.9	£2.0
NEIGHBOURHOOD CENTRES:	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	£3.0	£2.7	£3.4	£4.2	£5.1	£5.3
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	£28.4	£24.9	£32.9	£40.1	£49.1	£51.1
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£446.6</b>	<b>£389.5</b>	<b>£501.8</b>	<b>£602.5</b>	<b>£728.8</b>	<b>£758.0</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£867.8</b>	<b>£755.3</b>	<b>£964.5</b>	<b>£1,152.3</b>	<b>£1,387.2</b>	<b>£1,441.5</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>52%</b>	<b>53%</b>	<b>53%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER**  
*Including 'Inflow' from outside Study Area*

	Estimated 'Inflow' <sup>(1)</sup>	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	10%	£154.8	£133.9	£166.5	£193.1	£226.4	£234.1
BLUEWATER	70%	£882.8	£773.0	£1,014.1	£1,238.3	£1,519.8	£1,585.0
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	5%	£0.4	£0.4	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	5%	£0.5	£0.5	£0.6	£0.6	£0.7	£0.7
Dartford East	5%	£1.2	£1.1	£1.3	£1.5	£1.7	£1.8
Dartford West	5%	£1.3	£1.1	£1.3	£1.5	£1.7	£1.8
Longfield	35%	£5.4	£4.6	£5.5	£6.3	£7.2	£7.5
Swanscombe	15%	£1.6	£1.4	£1.7	£2.0	£2.3	£2.3
NEIGHBOURHOOD CENTRES:	0%	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	0%	£3.0	£2.7	£3.4	£4.2	£5.1	£5.3
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	15%	£33.4	£29.3	£38.7	£47.1	£57.7	£60.2
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£1,087.3</b>	<b>£950.3</b>	<b>£1,236.5</b>	<b>£1,498.4</b>	<b>£1,827.1</b>	<b>£1,903.2</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 3: DARTFORD BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT - EXCLUDING RETAIL FLOORSPACE COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£950.3	£1,236.5	£1,498.4	£1,827.1	£1,903.2
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£950.3	£1,194.8	£1,381.0	£1,593.2	£1,639.5
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£41.7	£117.4	£233.8	£263.7
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
<b>STEP 5:</b> <b>NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):</b>	-	<b>£41.7</b>	<b>£117.4</b>	<b>£233.8</b>	<b>£263.7</b>
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£7,543	£8,719	£10,059	£10,351
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>5,531</b>	<b>13,464</b>	<b>23,247</b>	<b>25,479</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		7,902	19,234	33,210	36,398

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

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.

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

STEPS 4/5: This retail capacity scenario does not take account of retail commitments

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance for new modern comparison goods floorspace trading in prime shopping locations

# APPENDIX A9

**TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON (CONSTANT) MARKET SHARE ANALYSIS (£m)**

*Excluding SFT & 'inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£89.2	£97.4	£98.1	£102.1	£106.5	£107.3
BLUEWATER:	£15.0	£16.6	£18.0	£20.2	£22.4	£22.8
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£1.8	£2.0	£1.9	£1.9	£1.9	£1.9
Temple Hill Square	£1.6	£1.8	£1.8	£1.9	£1.9	£1.9
Dartford East	£2.4	£2.7	£2.6	£2.7	£2.7	£2.8
Dartford West	£2.3	£2.6	£2.8	£3.1	£3.5	£3.6
Longfield	£11.9	£12.8	£12.2	£12.4	£12.6	£12.6
Swanscombe	£1.9	£2.1	£2.7	£3.2	£3.8	£3.9
NEIGHBOURHOOD CENTRES:	£14.2	£15.6	£16.0	£17.3	£18.6	£18.9
OTHER SMALLER STORES IN BOROUGH:	£4.2	£5.0	£6.8	£8.6	£10.4	£10.7
ALL OUT OF CENTRE STORES IN BOROUGH:	£44.7	£49.3	£52.4	£57.1	£62.0	£63.0
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£189.2</b>	<b>£207.8</b>	<b>£215.1</b>	<b>£230.4</b>	<b>£246.3</b>	<b>£249.5</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£576.4</b>	<b>£630.2</b>	<b>£638.6</b>	<b>£679.2</b>	<b>£721.4</b>	<b>£729.6</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL CONVENIENCE GOODS FLOORSPACE IN DARTFORD BOROUGH - TOTAL TURNOVER**

*Including 'inflow' from outside Study Area*

	Estimated 'inflow'	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	5%	£93.9	£102.5	£103.2	£107.5	£112.1	£112.9
BLUEWATER:	70%	£50.0	£55.5	£59.9	£67.2	£74.6	£76.1
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	2%	£1.9	£2.0	£1.9	£1.9	£1.9	£2.0
Temple Hill Square	2%	£1.7	£1.8	£1.8	£1.9	£2.0	£2.0
Dartford East	2%	£2.5	£2.7	£2.6	£2.7	£2.8	£2.8
Dartford West	2%	£2.4	£2.6	£2.8	£3.2	£3.6	£3.7
Longfield	50%	£23.8	£25.7	£24.4	£24.7	£25.1	£25.2
Swanscombe	15%	£2.2	£2.5	£3.1	£3.8	£4.4	£4.6
NEIGHBOURHOOD CENTRES:	0%	£14.2	£15.6	£16.0	£17.3	£18.6	£18.9
OTHER SMALLER STORES IN BOROUGH:	0%	£4.2	£5.0	£6.8	£8.6	£10.4	£10.7
ALL OUT OF CENTRE STORES IN BOROUGH:	15%	£52.5	£58.0	£61.6	£67.2	£73.0	£74.1
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£249.2</b>	<b>£273.9</b>	<b>£284.3</b>	<b>£306.0</b>	<b>£328.6</b>	<b>£333.0</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

**TABLE 3: DARTFORD BOROUGH - CONVENIENCE GOODS CAPACITY - EXCLUDING RETAIL FLOORSPACE COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£273.9	£284.3	£306.0	£328.6	£333.0
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£273.9	£264.9	£268.9	£273.0	£273.8
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£19.3	£37.1	£55.6	£59.2
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
<b>STEP 5:</b> <b>NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):</b>	-	<b>£19.3</b>	<b>£37.1</b>	<b>£55.6</b>	<b>£59.2</b>
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£9,673	£9,819	£9,967	£10,118
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>1,999</b>	<b>3,774</b>	<b>5,577</b>	<b>5,853</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		2,855	5,391	7,967	8,361

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

STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.

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

STEPS 4/5: Retail commitments have not been factored into the retail capacity.

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an average sales performance for the 'top 6' grocers (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and other supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)**  
Excluding SFT & 'Inflow' from outside Study Area

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£144.3	£126.5	£158.0	£184.5	£217.1	£224.5
BLUEWATER	£274.3	£243.4	£320.8	£394.4	£485.7	£506.7
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£0.4	£0.4	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	£0.5	£0.5	£0.6	£0.6	£0.7	£0.8
Dartford East	£1.2	£1.1	£1.3	£1.5	£1.7	£1.8
Dartford West	£1.3	£1.1	£1.3	£1.5	£1.7	£1.8
Longfield	£3.6	£3.2	£3.8	£4.3	£5.0	£5.2
Swanscombe	£1.4	£1.2	£1.5	£1.8	£2.1	£2.1
NEIGHBOURHOOD CENTRES:	£3.0	£2.6	£3.1	£3.5	£4.1	£4.2
OTHER PARADES / STORES:	£3.1	£2.8	£3.6	£4.4	£5.4	£5.6
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	£29.4	£26.1	£34.7	£42.5	£52.3	£54.5
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£462.6</b>	<b>£408.8</b>	<b>£529.2</b>	<b>£639.6</b>	<b>£776.4</b>	<b>£807.8</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£898.8</b>	<b>£792.8</b>	<b>£1,017.1</b>	<b>£1,223.2</b>	<b>£1,477.8</b>	<b>£1,536.1</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>52%</b>	<b>53%</b>	<b>53%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER**  
Including 'Inflow' from outside Study Area

	Estimated 'Inflow' <sup>(1)</sup>	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	10%	£160.3	£140.6	£175.6	£205.0	£241.2	£249.5
BLUEWATER	70%	£914.3	£811.4	£1,069.4	£1,314.5	£1,619.1	£1,689.1
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	5%	£0.4	£0.4	£0.5	£0.5	£0.6	£0.6
Temple Hill Square	5%	£0.6	£0.5	£0.6	£0.7	£0.8	£0.8
Dartford East	5%	£1.3	£1.1	£1.3	£1.6	£1.8	£1.9
Dartford West	5%	£1.3	£1.2	£1.4	£1.6	£1.8	£1.9
Longfield	35%	£5.6	£4.9	£5.8	£6.7	£7.7	£7.9
Swanscombe	15%	£1.6	£1.4	£1.8	£2.1	£2.4	£2.5
NEIGHBOURHOOD CENTRES:	0%	£3.0	£2.6	£3.1	£3.5	£4.1	£4.2
OTHER PARADES / STORES:	0%	£3.1	£2.8	£3.6	£4.4	£5.4	£5.6
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	15%	£34.6	£30.8	£40.8	£50.0	£61.5	£64.1
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£1,126.2</b>	<b>£997.5</b>	<b>£1,303.9</b>	<b>£1,590.6</b>	<b>£1,946.5</b>	<b>£2,028.1</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.



# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 3: DARTFORD BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT - EXCLUDING RETAIL FLOORSPACE COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£997.5	£1,303.9	£1,590.6	£1,946.5	£2,028.1
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£997.5	£1,254.1	£1,449.6	£1,672.3	£1,720.8
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£49.8	£141.0	£274.1	£307.3
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
<b>STEP 5:</b> <b>NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):</b>	-	<b>£49.8</b>	<b>£141.0</b>	<b>£274.1</b>	<b>£307.3</b>
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£7,543	£8,719	£10,059	£10,351
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>6,607</b>	<b>16,171</b>	<b>27,249</b>	<b>29,686</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		9,439	23,101	38,928	42,409

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

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.

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

STEPS 4/5: This retail capacity scenario does not take account of retail commitments

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance for new modern comparison goods floorspace trading in prime shopping locations

# APPENDIX A10

## DARTFORD BOROUGH: PLANNED/COMMITTED RETAIL FLOORSPACE (@ June 2020)

**TABLE 1: DARTFORD TOWN CENTRE - LOWFIELD STREET (COPPERHOUSE GREEN)**

PLANNING REFERENCE: 16/01919/FUL	TOTAL PERMITTED COMMERCIAL FLOORSPACE (gross sqm)	TOTAL ESTIMATED CLASS A1 FLOORSPACE TO BE IMPLEMENTED		Sales Density 2020 (£ per sqm)
		Gross Sqm	Net Sqm	
CONVENIENCE GOODS		292	234	£10,000
COMPARISON GOODS		336	269	£6,000
<b>TOTAL NEW CLASS A1 RETAIL TO BE IMPLEMENTED:</b>	<b>932</b>	<b>626</b>	<b>438</b>	

FORECAST TURNOVER OF NEW CLASS A1 RETAIL FLOORSPACE (£m)				
2020	2025	2030	2035	2036
£2.3	£2.3	£2.3	£2.3	£2.3
£1.6	£2.0	£2.3	£2.7	£2.8
<b>£3.9</b>	<b>£4.3</b>	<b>£4.6</b>	<b>£5.0</b>	<b>£5.1</b>

**Notes:** The Council approved the application (ref: 16/01919/FUL) in September 2017 for:

- Detailed permission for the demolition of existing buildings, refurbishment of No. 26 Lowfield Street and the construction of 188 dwellings, Class A retail units, office, café/micro-brewery, car parking, new internal access roads and associated works; and
- Outline permission, with all matters reserved (except access) for the demolition of existing buildings and the erection of up to 360 dwellings and flexibility for Class A1-A3 uses and Class D1 (non-residential institutions) fronting Lowfield Street..

The illustrative (ground floor) masterplan for the permitted scheme shows the potential for four Class A1 retail units with a total GEA of 626 sqm and frontage on to Lowfield Street. The four retail units (Block D) have the following floor areas: 107 sqm, 144 sqm, 192 sqm and 185 sqm. There is also permission for two food and beverage units (Class A3) with a gross area of 142 sqm and 164 sqm respectively.

For the purpose of this assessment it has been assumed that the Class A1 retail will be split between convenience and comparison goods retailing. With 292 sqm (185 sqm + 107 sqm units) for convenience sales and 336 sqm (192 sqm + 144 sqm) for comparison sales. A net/gross ratio of 80% has been applied to the gross floor areas to derive the sales areas.

**Table 2: NORTHERN GATEWAY (MILL POND) - DARTFORD TOWN CENTRE**

PLANNING REFERENCE: 15/00625/REM	TOTAL PERMITTED COMMERCIAL FLOORSPACE (gross sqm)	TOTAL ESTIMATED RETAIL FLOORSPACE		Sales Density 2020 (£ per sqm)
		Gross Sqm	Net Sqm	
CONVENIENCE GOODS		267	214	£10,000
COMPARISON GOODS		267	214	£6,000
<b>TOTAL NEW RETAIL FLOORSPACE:</b>	<b>2,582</b>	<b>535</b>	<b>428</b>	

FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
2020	2025	2030	2035	2036
£2.1	£2.1	£2.1	£2.1	£2.1
£1.3	£1.6	£1.9	£2.2	£2.2
<b>£3.4</b>	<b>£3.7</b>	<b>£4.0</b>	<b>£4.3</b>	<b>£4.4</b>

**Notes:** The Council approved the reserved matters application (ref: 15/00625/REM) in December 2015 (pursuant to condition 1 of outline planning permission DA/15/00519/VCON) for 154 one-bed, 192 two-bed and 54 three-bed apartments (400 units in total). The permission also allowed for 2,582 sqm of non-residential uses comprising office uses (Class B1); retail, financial and professional services, restaurant, café and drinking establishment uses (Class A1/A2/A3/A4); and non-residential institutions/community and assembly and leisure uses (Class D1/D2). The permission also allowed for 359 car parking spaces and cycle parking.

The Council has confirmed that some 400 sqm of Class A1 retail floorspace has since been built out to accommodate the Co-op store, along with a further 400 sqm for a gym (Class D2). This leaves a residual of 1,782 sqm with permission for a mix of Class A1-A4 and B1 uses.

For the purpose of the economic capacity assessment it is assumed that Class A1 retailing will account for approximately 30% (535 sqm gross) of the residual Class A1-A4/B1 space with permission. It is assumed that 50% of the Class A1 space will be set aside for the sale of convenience goods and 50% for comparison goods. A net/gross ratio of 80% has been applied to the gross floorspace to derive the net sales area.

## DARTFORD BOROUGH: PLANNED/COMMITTED RETAIL FLOORSPACE

**Table 3: Ebbsfleet Central - Total estimated new retail floorspace, phasing, mix and forecast turnover**

	TOTAL ESTIMATED RETAIL FLOORSPACE		Sales Density 2020 (£ per sqm)
	Gross Sqm	Net Sqm	
<b>CONVENIENCE GOODS</b>			
2025-2031	3,552	2,487	£10,000
2031-2035	1,386	970	£10,000
2035-2036	543	380	£10,000
<b>TOTAL:</b>	<b>5,481</b>	<b>3,837</b>	
<b>COMPARISON GOODS</b>			
2025-2031	1,522	1,142	£6,000
2031-2035	3,235	2,426	£6,000
2035-2036	543	407	£6,000
<b>TOTAL:</b>	<b>5,300</b>	<b>3,975</b>	
<b>TOTAL NEW RETAIL FLOORSPACE:</b>	<b>10,781</b>	<b>7,812</b>	

FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
2020	2025	2030	2035	2036
-	£24.1	£24.4	£24.8	£24.9
-	-	-	£9.7	£9.7
-	-	-	-	£3.8
<b>£0.0</b>	<b>£24.1</b>	<b>£24.4</b>	<b>£34.5</b>	<b>£38.4</b>

FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
2020	2025	2030	2035	2036
-	£8.6	£10.0	£11.5	£11.8
-	-	-	£24.4	£25.1
-	-	-	-	£4.2
<b>£0.0</b>	<b>£8.6</b>	<b>£10.0</b>	<b>£35.9</b>	<b>£41.1</b>
<b>£0.0</b>	<b>£32.7</b>	<b>£34.4</b>	<b>£70.3</b>	<b>£79.5</b>

**Table 4: Eastern Quarry - Total estimated new retail floorspace, phasing, mix and forecast turnover**

	TOTAL ESTIMATED RETAIL FLOORSPACE		Sales Density 2020 (£ per sqm)
	Gross Sqm	Net Sqm	
<b>EASTERN VILLAGE - CASTLE HILL</b>			
CONVENIENCE GOODS:	424	297	£10,000
COMPARISON GOODS:	151	113	£6,000
<b>TOTAL:</b>	<b>575</b>	<b>410</b>	
<b>CENTRAL VILLAGE - ALKERDEN</b>			
CONVENIENCE GOODS:	1,800	1,260	£10,000
COMPARISON GOODS:	1,975	1,481	£6,000
<b>TOTAL:</b>	<b>3,775</b>	<b>2,741</b>	
<b>WESTERN VILLAGE - WESTERN CROSS/ASHMERE (3)</b>			
CONVENIENCE GOODS:	1,050	735	£10,000
COMPARISON GOODS:	450	338	£6,000
<b>TOTAL:</b>	<b>1,500</b>	<b>1,073</b>	
<b>TOTAL NEW RETAIL FLOORSPACE:</b>	<b>5,850</b>	<b>4,224</b>	

FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
2020	2025	2030	2035	2036
£0.0	£0.0	£2.9	£3.0	£3.0
£0.0	£0.0	£1.0	£1.1	£1.2
<b>£0.0</b>	<b>£0.0</b>	<b>£3.9</b>	<b>£4.1</b>	<b>£4.1</b>
<b>CENTRAL VILLAGE - ALKERDEN</b>				
£0.0	£0.0	£12.4	£12.6	£12.6
£0.0	£0.0	£12.9	£14.9	£15.3
<b>£0.0</b>	<b>£0.0</b>	<b>£25.3</b>	<b>£27.5</b>	<b>£27.9</b>
<b>WESTERN VILLAGE - WESTERN CROSS/ASHMERE (3)</b>				
£0.0	£0.0	£7.2	£7.3	£7.3
£0.0	£0.0	£2.9	£3.4	£3.5
<b>£0.0</b>	<b>£0.0</b>	<b>£10.2</b>	<b>£10.7</b>	<b>£10.8</b>
<b>£0.0</b>	<b>£0.0</b>	<b>£39.3</b>	<b>£42.3</b>	<b>£42.9</b>

## DARTFORD BOROUGH: PLANNED/COMMITTED RETAIL FLOORSPACE

**Table 5: BLUEWATER SHOPPING CENTRE - WEST VILLAGE**

PLANNING REFERENCE: DA/12/01464/OUT & 16/01207/OUT	TOTAL PERMITTED COMMERCIAL FLOORSPACE (gross sqm)	TOTAL ESTIMATED RETAIL FLOORSPACE		Sales Density 2020 (£ per sqm)	FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
		Gross Sqm	Net Sqm		2020	2025	2030	2035	2036
<b>TOTAL MAX NEW CLASS A1 RETAIL FLOORSPACE PERMITTED:</b>	<b>28,500</b>								
CONVENIENCE GOODS	285	285	200	£10,000	£2.0	£1.9	£2.0	£2.0	£2.0
COMPARISON GOODS	28,215	23,948	16,764	£6,000	£100.6	£126.5	£146.2	£168.6	£173.5
<b>TOTAL MAX NEW CLASS A3-A5 FLOORSPACE PERMITTED:</b>	<b>2,500</b>								
<b>TOTAL NEW RETAIL FLOORSPACE:</b>	<b>30,000</b>	<b>24,233</b>	<b>16,963</b>		<b>£102.6</b>	<b>£128.4</b>	<b>£148.1</b>	<b>£170.6</b>	<b>£175.5</b>

**Notes:** The outline application (ref: 16/01207/OUT) was granted in June 2017 and allows for extensions/alterations to the West Village area of Bluewater. The permission allows for up to 30,000 sqm Gross External Area (GEA) of new Class A1-A5 floorspace (under condition 30). This superseded the consent granted in 2013 for the West Village extension (ref: DA/12/01464/OUT), which allowed for up to 30,500 sqm.

The permission was subject to conditions to limit the Class A1 comparison goods floorspace to a maximum of 28,500 sqm (condition 32) and a max of 2,500 sqm for Class A3-A5 uses (condition 33). Under condition 31 Class A1 convenience goods retail is restricted to 1% of the net additional floorspace permitted; in other words the permission does not allow for the bulk of the floorspace to be taken up by a large food superstore.

Based on the Retail Impact Assessment (RIA) prepared by Quod in October 2016 on behalf of Blueco Limited and Bluewater Outer Area Limited ("the Applicants") and the independent appraisal carried out by Carter Jonas ("CJ") in January 2017, the net sales area and turnover of the new floorspace was agreed as follows:

1. Assuming that the maximum permitted Class A1 comparison goods floorspace of 28,500 sqm gross will be developed out, it was assumed by Quod (and accepted by CJ) that this would be equivalent to a net sales area of 19,950 sqm. This is based on an assumed net/gross ratio of 70%.
2. Quod assumed an average sales density of £8,645 per sqm, which was equivalent to a total 'benchmark' comparison goods turnover of £172.46m. CJ accepted that this turnover assumption was reasonable at the time of their appraisal.

The Council has confirmed that some 4,267 sqm gross of Class A1 retail floorspace has been built out to date. This leaves a residual 24,233 sqm gross of Class A1 retail floorspace with permission (out of the total max Class A1 allowed under Condition 32 of 28,500 sqm gross) that had not been implemented at the time of preparing this assessment.

Applying a net/gross ratio of 70% to the residual 24,233 sqm gross of Class A1 retail floorspace results in a total residual sales area of circa 16,963 sqm gross that is still to be implemented. It is assumed that circa 285 sqm gross (i.e. 1% of the total max Class A1 permitted floorspace of 28,500 sqm) can be set aside for convenience goods retailing under Condition 31 of the permission.

**Table 6: OUT-OF-CENTRE COMMITMENTS - GALLEON BOULEVARD (CROSSWAYS BUSINESS PARK), DARTFORD**

PLANNING REFERENCE: DA/09/01473/VCON & 17/00493/REM	TOTAL PERMITTED COMMERCIAL FLOORSPACE (gross sqm)	TOTAL ESTIMATED RETAIL FLOORSPACE		Sales Density 2020 (£ per sqm)	FORECAST TURNOVER OF RETAIL FLOORSPACE (£m)				
		Gross Sqm	Net Sqm		2020	2025	2030	2035	2036
CONVENIENCE GOODS		91	73	£10,000	£0.7	£0.7	£0.7	£0.7	£0.7
COMPARISON GOODS				£6,000	£0.0	£0.0	£0.0	£0.0	£0.0
<b>TOTAL NEW RETAIL FLOORSPACE:</b>	<b>207</b>	<b>91</b>	<b>73</b>		<b>£0.7</b>	<b>£0.7</b>	<b>£0.7</b>	<b>£0.7</b>	<b>£0.7</b>

**Notes:** The Council approved the reserved matters application (ref: 17/00493/REM) in June 2017 (pursuant to permission DA/09/01473/VCON) for erection of a 3-storey mixed use development comprising a Class A1 retail unit (91 sqm GIA), a Class A1/A3 coffee shop (116 sqm GIA), and Class B1 office units to the upper floors.

For the purpose of the economic capacity assessment it is assumed that the Class A1 floorspace (91 sqm gross) will be for convenience goods retailing only. A net/gross ratio of 80% has been applied to the gross floorspace to derive the net sales area.

# APPENDIX A11

**DARTFORD EBBSFLEET RETAIL LEISURE STUDY**

Convenience Goods Capacity

**TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON (CONSTANT) MARKET SHARE ANALYSIS (£m)**
*Excluding SFT & 'Inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£86.7	£93.3	£94.0	£97.5	£101.4	£102.1
BLUEWATER:	£14.6	£15.9	£17.2	£19.2	£21.3	£21.7
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£1.8	£1.9	£1.8	£1.8	£1.8	£1.8
Temple Hill Square	£1.6	£1.7	£1.7	£1.8	£1.8	£1.9
Dartford East	£2.4	£2.5	£2.5	£2.5	£2.6	£2.6
Dartford West	£2.2	£2.5	£2.7	£3.0	£3.4	£3.4
Longfield	£11.6	£12.3	£11.7	£11.8	£12.0	£12.0
Swanscombe	£1.8	£2.1	£2.6	£3.1	£3.6	£3.7
NEIGHBOURHOOD CENTRES:	£13.8	£14.9	£15.3	£16.5	£17.8	£18.0
OTHER SMALLER STORES IN BOROUGH:	£4.1	£4.8	£6.5	£8.2	£9.9	£10.2
ALL OUT OF CENTRE STORES IN BOROUGH:	£43.4	£47.2	£50.2	£54.5	£59.1	£59.9
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£183.9</b>	<b>£199.0</b>	<b>£206.1</b>	<b>£219.8</b>	<b>£234.6</b>	<b>£237.4</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£560.2</b>	<b>£603.5</b>	<b>£612.0</b>	<b>£648.2</b>	<b>£686.9</b>	<b>£694.2</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>	<b>34%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL CONVENIENCE GOODS FLOORSPACE IN DARTFORD BOROUGH - TOTAL TURNOVER**
*Including 'Inflow' from outside Study Area*

	Estimated 'Inflow'	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	5%	£91.3	£98.2	£98.9	£102.6	£106.7	£107.5
BLUEWATER:	70%	£48.6	£53.1	£57.4	£64.1	£71.0	£72.4
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	2%	£1.8	£1.9	£1.8	£1.8	£1.9	£1.9
Temple Hill Square	2%	£1.6	£1.7	£1.8	£1.8	£1.9	£1.9
Dartford East	2%	£2.4	£2.6	£2.5	£2.6	£2.7	£2.7
Dartford West	2%	£2.3	£2.5	£2.7	£3.1	£3.4	£3.5
Longfield	50%	£23.1	£24.6	£23.4	£23.6	£23.9	£24.0
Swanscombe	15%	£2.1	£2.4	£3.0	£3.6	£4.2	£4.3
NEIGHBOURHOOD CENTRES:	0%	£13.8	£14.9	£15.3	£16.5	£17.8	£18.0
OTHER SMALLER STORES IN BOROUGH:	0%	£4.1	£4.8	£6.5	£8.2	£9.9	£10.2
ALL OUT OF CENTRE STORES IN BOROUGH:	15%	£51.1	£55.6	£59.0	£64.1	£69.5	£70.5
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£242.2</b>	<b>£262.3</b>	<b>£272.4</b>	<b>£292.0</b>	<b>£312.8</b>	<b>£316.8</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

**TABLE 3: DARTFORD BOROUGH - CONVENIENCE GOODS CAPACITY - INCLUDING RETAIL FLOORSPACE COMMITMENTS IN DARTFORD TOWN CENTRE & EBBSFLEET**  
**Constant Market Share Approach**

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£262.3	£272.4	£292.0	£312.8	£316.8
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£262.3	£253.7	£257.5	£261.4	£262.2
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£18.7	£34.4	£51.4	£54.6
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£28.4	£51.3	£61.8	£65.7
<b>STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):</b>	-	<b>-£9.7</b>	<b>-£16.9</b>	<b>-£10.3</b>	<b>-£11.1</b>
<b>STEP 6: CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£9,673	£9,819	£9,967	£10,118
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>-1,000</b>	<b>-1,719</b>	<b>-1,037</b>	<b>-1,097</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,428	-2,456	-1,482	-1,567

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an average sales performance for the 'top 6' grocers (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and other supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).



# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)**  
Excluding SFT & 'Inflow' from outside Study Area

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£139.3	£120.5	£149.9	£173.8	£203.8	£210.7
BLUEWATER	£264.8	£231.9	£304.2	£371.5	£456.0	£475.5
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£0.4	£0.3	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	£0.5	£0.4	£0.5	£0.6	£0.7	£0.7
Dartford East	£1.2	£1.0	£1.2	£1.4	£1.6	£1.7
Dartford West	£1.2	£1.1	£1.3	£1.4	£1.6	£1.7
Longfield	£3.5	£3.0	£3.6	£4.1	£4.7	£4.8
Swanscombe	£1.3	£1.2	£1.5	£1.7	£1.9	£2.0
NEIGHBOURHOOD CENTRES:	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	£3.0	£2.7	£3.4	£4.2	£5.1	£5.3
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	£28.4	£24.9	£32.9	£40.1	£49.1	£51.1
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£446.6</b>	<b>£389.5</b>	<b>£501.8</b>	<b>£602.5</b>	<b>£728.8</b>	<b>£758.0</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£867.8</b>	<b>£755.3</b>	<b>£964.5</b>	<b>£1,152.3</b>	<b>£1,387.2</b>	<b>£1,441.5</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>52%</b>	<b>53%</b>	<b>53%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER**  
Including 'Inflow' from outside Study Area

	Estimated 'Inflow' <sup>(1)</sup>	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	10%	£154.8	£133.9	£166.5	£193.1	£226.4	£234.1
BLUEWATER	70%	£882.8	£773.0	£1,014.1	£1,238.3	£1,519.8	£1,585.0
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	5%	£0.4	£0.4	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	5%	£0.5	£0.5	£0.6	£0.6	£0.7	£0.7
Dartford East	5%	£1.2	£1.1	£1.3	£1.5	£1.7	£1.8
Dartford West	5%	£1.3	£1.1	£1.3	£1.5	£1.7	£1.8
Longfield	35%	£5.4	£4.6	£5.5	£6.3	£7.2	£7.5
Swanscombe	15%	£1.6	£1.4	£1.7	£2.0	£2.3	£2.3
NEIGHBOURHOOD CENTRES:	0%	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	0%	£3.0	£2.7	£3.4	£4.2	£5.1	£5.3
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	15%	£33.4	£29.3	£38.7	£47.1	£57.7	£60.2
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£1,087.3</b>	<b>£950.3</b>	<b>£1,236.5</b>	<b>£1,498.4</b>	<b>£1,827.1</b>	<b>£1,903.2</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 3: DARTFORD BOROUGH - COMPARISON GOODS CAPACITY - ALL RETAIL COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£950.3	£1,236.5	£1,498.4	£1,827.1	£1,903.2
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£950.3	£1,180.9	£1,354.4	£1,562.6	£1,607.9
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£55.6	£144.0	£264.5	£295.3
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£138.7	£177.2	£228.8	£239.7
<b>STEP 5:</b> NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£83.1	-£33.2	£35.7	£55.7
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£7,456	£8,551	£9,865	£10,151
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	-11,148	-3,879	3,623	5,483
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-15,926	-5,542	5,176	7,833

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

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance for new modern comparison goods floorspace trading in prime shopping locations

# APPENDIX A12

**DARTFORD EBBSFLEET RETAIL LEISURE STUDY**

Convenience Goods Capacity

**TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON (CONSTANT) MARKET SHARE ANALYSIS (£m)**
*Excluding SFT & 'Inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£86.7	£93.3	£94.0	£101.4	£108.4	£109.9
BLUEWATER:	£14.6	£15.9	£17.2	£19.6	£22.0	£22.5
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£1.8	£1.9	£1.8	£1.8	£1.8	£1.8
Temple Hill Square	£1.6	£1.7	£1.7	£1.9	£2.0	£2.1
Dartford East	£2.4	£2.5	£2.5	£2.6	£2.6	£2.7
Dartford West	£2.2	£2.5	£2.7	£3.1	£3.5	£3.6
Longfield	£11.6	£12.3	£11.7	£11.8	£12.0	£12.0
Swanscombe	£1.8	£2.1	£2.6	£3.1	£3.7	£3.9
NEIGHBOURHOOD CENTRES:	£13.8	£14.9	£15.3	£16.7	£18.2	£18.5
OTHER SMALLER STORES IN BOROUGH:	£4.1	£4.8	£6.5	£8.7	£11.0	£11.4
ALL OUT OF CENTRE STORES IN BOROUGH:	£43.4	£47.2	£50.2	£55.4	£61.0	£62.1
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£183.9</b>	<b>£199.0</b>	<b>£206.1</b>	<b>£226.1</b>	<b>£246.3</b>	<b>£250.4</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£560.2</b>	<b>£603.5</b>	<b>£612.0</b>	<b>£656.0</b>	<b>£702.1</b>	<b>£711.0</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>34%</b>	<b>35%</b>	<b>35%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL CONVENIENCE GOODS FLOORSPACE IN DARTFORD BOROUGH - TOTAL TURNOVER**
*Including 'Inflow' from outside Study Area*

	Estimated 'Inflow'	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	5%	£91.3	£98.2	£98.9	£106.7	£114.1	£115.7
BLUEWATER:	70%	£48.6	£53.1	£57.4	£65.3	£73.5	£75.1
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	2%	£1.8	£1.9	£1.8	£1.8	£1.9	£1.9
Temple Hill Square	2%	£1.6	£1.7	£1.8	£1.9	£2.1	£2.1
Dartford East	2%	£2.4	£2.6	£2.5	£2.6	£2.7	£2.7
Dartford West	2%	£2.3	£2.5	£2.7	£3.1	£3.6	£3.7
Longfield	50%	£23.1	£24.6	£23.4	£23.6	£23.9	£24.0
Swanscombe	15%	£2.1	£2.4	£3.0	£3.7	£4.4	£4.5
NEIGHBOURHOOD CENTRES:	0%	£13.8	£14.9	£15.3	£16.7	£18.2	£18.5
OTHER SMALLER STORES IN BOROUGH:	0%	£4.1	£4.8	£6.5	£8.7	£11.0	£11.4
ALL OUT OF CENTRE STORES IN BOROUGH:	15%	£51.1	£55.6	£59.0	£65.2	£71.7	£73.0
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£242.2</b>	<b>£262.3</b>	<b>£272.4</b>	<b>£299.4</b>	<b>£327.0</b>	<b>£332.6</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

**TABLE 3: DARTFORD BOROUGH - CONVENIENCE GOODS CAPACITY - ALL RETAIL COMMITMENTS**  
**Constant Market Share Approach**

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£262.3	£272.4	£299.4	£327.0	£332.6
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£262.3	£253.7	£257.5	£261.4	£262.2
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£18.7	£41.9	£65.6	£70.4
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£31.0	£54.0	£64.5	£68.5
<b>STEP 5:</b> NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£12.3	-£12.1	£1.1	£1.9
<b>STEP 6: CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£9,673	£9,819	£9,967	£10,118
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>-1,272</b>	<b>-1,235</b>	<b>115</b>	<b>193</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,817	-1,764	164	275

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

STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.

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

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2025.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an average sales performance for the 'top 6' grocers (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and other supermarket and Limited Assortment Discount (LAD) operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)**

*Excluding SFT & 'Inflow' from outside Study Area*

	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	£139.3	£120.5	£149.9	£177.4	£211.1	£219.1
BLUEWATER	£264.8	£231.9	£304.2	£377.4	£469.4	£490.9
DISTRICT CENTRES:						
Hawley Road/Lowfield Street	£0.4	£0.3	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	£0.5	£0.4	£0.5	£0.6	£0.7	£0.7
Dartford East	£1.2	£1.0	£1.2	£1.4	£1.6	£1.7
Dartford West	£1.2	£1.1	£1.3	£1.4	£1.6	£1.7
Longfield	£3.5	£3.0	£3.6	£4.1	£4.7	£4.8
Swanscombe	£1.3	£1.2	£1.5	£1.7	£1.9	£2.0
NEIGHBOURHOOD CENTRES:	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	£3.0	£2.7	£3.4	£4.2	£5.2	£5.4
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	£28.4	£24.9	£32.9	£40.8	£50.8	£53.1
<b>TOTAL EXPENDITURE RETAINED BY BOROUGH'S CENTRES/STORES:</b>	<b>£446.6</b>	<b>£389.5</b>	<b>£501.8</b>	<b>£612.8</b>	<b>£751.5</b>	<b>£783.9</b>
<b>TOTAL AVAILABLE EXPENDITURE:</b>	<b>£867.8</b>	<b>£755.3</b>	<b>£964.5</b>	<b>£1,166.1</b>	<b>£1,417.7</b>	<b>£1,476.3</b>
<b>TOTAL RETENTION LEVEL (%)</b>	<b>51%</b>	<b>52%</b>	<b>52%</b>	<b>53%</b>	<b>53%</b>	<b>53%</b>

**Notes:** Total expenditure allocated to main centres, stores and floorspace based on household survey results. Assume constant market shares over forecast period.

**TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER**

*Including 'Inflow' from outside Study Area*

	Estimated 'Inflow' <sup>(1)</sup>	2019	2020	2025	2030	2035	2036
DARTFORD TOWN CENTRE	10%	£154.8	£133.9	£166.5	£197.1	£234.6	£243.5
BLUEWATER	70%	£882.8	£773.0	£1,014.1	£1,258.0	£1,564.7	£1,636.2
DISTRICT CENTRES:							
Hawley Road/Lowfield Street	5%	£0.4	£0.4	£0.4	£0.5	£0.6	£0.6
Temple Hill Square	5%	£0.5	£0.5	£0.6	£0.6	£0.7	£0.7
Dartford East	5%	£1.2	£1.1	£1.3	£1.5	£1.7	£1.8
Dartford West	5%	£1.3	£1.1	£1.3	£1.5	£1.7	£1.8
Longfield	35%	£5.4	£4.6	£5.5	£6.3	£7.2	£7.5
Swanscombe	15%	£1.6	£1.4	£1.7	£2.0	£2.3	£2.3
NEIGHBOURHOOD CENTRES:	0%	£2.9	£2.5	£2.9	£3.3	£3.8	£4.0
OTHER PARADES / STORES:	0%	£3.0	£2.7	£3.4	£4.2	£5.2	£5.4
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	15%	£33.4	£29.3	£38.7	£48.0	£59.7	£62.5
<b>TOTAL ESTIMATED TURNOVER OF ALL CENTRES/FLOORSPACE</b>		<b>£1,087.3</b>	<b>£950.3</b>	<b>£1,236.5</b>	<b>£1,523.0</b>	<b>£1,882.3</b>	<b>£1,966.2</b>

**Notes:** Estimated 'inflow' (or trade draw) from outside the defined study area is based on informed judgements by LSH that take account of range of factors including: (i) location; (ii) existing critical mass and attraction of retail offer compared with competing centres and shopping locations/stores; and (iii) estimates of the level of retail spend likely to be generated by commuter (those working in centres, but living outside the study area), visitors and tourists; (iv) reference to other research and evidence-based documents, including previous retail and town centre studies prepared for the Council.

# DARTFORD EBBSFLEET RETAIL LEISURE STUDY

Comparison Goods Capacity

**TABLE 3: DARTFORD BOROUGH - COMPARISON GOODS CAPACITY - ALL RETAIL COMMITMENTS**  
Constant Market Share Approach

	2020	2025	2030	2035	2036
<b>STEP 1:</b> TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£950.3	£1,236.5	£1,523.0	£1,882.3	£1,966.2
<b>STEP 2:</b> TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) <sup>(1)</sup> :	£950.3	£1,194.8	£1,381.0	£1,593.2	£1,639.5
<b>STEP 3:</b> NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£41.7	£142.0	£289.1	£326.8
<b>STEP 4:</b> TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	£138.7	£177.2	£228.8	£239.7
<b>STEP 5:</b> NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£97.0	-£35.2	£60.3	£87.1
<b>STEP 6: CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:</b>					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£7,543	£8,719	£10,059	£10,351
<b>(ii) Net Floorspace Capacity (sq m):</b>	-	<b>-12,857</b>	<b>-4,037</b>	<b>5,993</b>	<b>8,416</b>
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-18,367	-5,766	8,562	12,023

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

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian *Retail Planner Briefing Note 18* (October 2020) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed average sales performance for new modern comparison goods floorspace trading in prime shopping locations

# APPENDIX A13



**TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2019 - 2036)**

	2019	2020	2025	2030	2035	2036
Zone 1	2,645	3,145	5,642	6,609	7,572	7,764
Zone 2	17,941	17,963	18,071	18,272	18,473	18,513
Zone 3	23,529	23,551	23,659	23,836	24,013	24,048
Zone 4	16,736	16,751	16,828	16,989	17,150	17,182
Zone 5	19,998	20,197	21,192	22,012	22,829	22,992
Zone 6	14,470	14,711	15,917	16,175	16,432	16,483
Zone 7	1,566	2,896	9,543	16,243	22,915	24,244
Zone 8	12,815	12,829	12,901	13,029	13,157	13,182
Zone 9	79,641	80,587	85,341	89,924	94,170	94,981
Zone 10	27,004	27,242	28,350	29,341	30,337	30,508
Zone 11	43,601	44,060	46,243	48,350	50,476	50,904
<b>STUDY AREA - TOTAL:</b>	<b>259,946</b>	<b>263,931</b>	<b>283,687</b>	<b>300,780</b>	<b>317,524</b>	<b>320,801</b>

Growth: 2019 30		Growth: 2019 36	
%	No.	%	No.
126.1%	3,964	162.8%	5,119
1.8%	331	3.2%	572
1.3%	307	2.2%	519
1.5%	253	2.7%	446
10.0%	2,014	14.8%	2,994
11.6%	1,705	13.7%	2,013
506.9%	14,677	783.2%	22,678
1.7%	214	2.9%	367
12.8%	10,283	19.0%	15,340
8.6%	2,337	12.9%	3,504
10.8%	4,749	16.6%	7,303
<b>15.5%</b>	<b>40,834</b>	<b>23.1%</b>	<b>60,855</b>

	2019	2020	2025	2030	2035	2036
Zones 1-5 DARTFORD EAST	80,849	81,606	85,392	87,718	90,037	90,499
Zones 6-8 DARTFORD WEST	28,851	30,436	38,361	45,447	52,504	53,909
Zones 9-11 OUTER BOROUGH AREA	150,246	151,889	159,934	167,615	174,983	176,393
<b>STUDY AREA TOTAL:</b>	<b>259,946</b>	<b>263,931</b>	<b>283,687</b>	<b>300,780</b>	<b>317,524</b>	<b>320,801</b>

Growth: 2019 30		Growth: 2019 36	
%	No.	%	No.
8.4%	6,869	11.8%	9,650
54.5%	16,596	82.3%	25,058
11.4%	17,369	17.2%	26,147
<b>15.5%</b>	<b>40,834</b>	<b>23.1%</b>	<b>60,855</b>

Source: Experian Business Strategies - MMG3 Geographic Information System (GIS) 'Retail Area Planner Population & Expenditure Datasets'  
 Notes: Base year population & projections for Zones 1-8 sourced from Darford Borough Council. Forecasts for Zones 9-11 have been sourced from LSH's Experian MMG3 datasets

**TABLE 2: TOTAL LEISURE EXPENDITURE PER CAPITA BY SERVICES (2017 price base)**

£ per capita:	Accomm Services (1)	Cultural Services (2)	Games of Chance (3)	Personal Grooming (4)	Recreation & Sporting Services (5)	Food & Beverage (6)	TOTAL
Zone 1	£154	£375	£194	£113	£147	£1,346	<b>£2,329</b>
Zone 2	£123	£392	£217	£112	£158	£1,222	<b>£2,223</b>
Zone 3	£136	£395	£206	£129	£184	£1,309	<b>£2,359</b>
Zone 4	£183	£421	£245	£151	£219	£1,458	<b>£2,677</b>
Zone 5	£145	£407	£210	£132	£176	£1,345	<b>£2,415</b>
Zone 6	£136	£414	£221	£140	£175	£1,336	<b>£2,422</b>
Zone 7	£255	£530	£200	£177	£280	£2,057	<b>£3,498</b>
Zone 8	£193	£439	£223	£158	£216	£1,446	<b>£2,675</b>
Zone 9	£154	£386	£239	£112	£201	£1,269	<b>£2,361</b>
Zone 10	£162	£432	£257	£140	£177	£1,338	<b>£2,506</b>
Zone 11	£121	£341	£201	£103	£140	£1,138	<b>£2,045</b>
<b>STUDY AREA AVERAGE:</b>	<b>£160</b>	<b>£412</b>	<b>£219</b>	<b>£133</b>	<b>£188</b>	<b>£1,388</b>	<b>£2,501</b>
<b>EXPRESSED AS % OF TOTAL AVERAGE SPEND:</b>	<b>6%</b>	<b>16%</b>	<b>9%</b>	<b>5%</b>	<b>8%</b>	<b>55%</b>	<b>100%</b>
<b>SOUTH EAST REGION AVERAGE:</b>							<b>£4,627</b>
<b>NATIONAL (UK) AVERAGE:</b>							<b>£3,551</b>

Source: Average spend per capita estimates (2017 prices) are derived from Experian MMG3 'Retail Area Planner' Reports.

- Notes:
- (1) Includes spend on hotels, bed & breakfast accommodation, etc.
  - (2) Includes spend on Museums, Theatres, Art Galleries, etc.
  - (3) Includes spend on Bookmakers, Amusement Arcades, Bingo, Casinos, etc.
  - (4) Includes spend on Hairdressers, Nail Parlours, Health & Beauty, etc.
  - (5) Includes spend on Gyms, Golf, etc.
  - (6) Includes spend on restaurants, cafés, takeaways, etc.

**TABLE 3: LEISURE EXPENDITURE PER CAPITA GROWTH FORECASTS (% per annum)**

	2018	2019	2020	2021	2022	2023-2027	2028-2040	HISTORIC TREND: 1997-2019
<b>LEISURE SPEND - GROWTH PER ANNUM (%):</b>	<b>-1.5%</b>	<b>-0.5%</b>	<b>-53.8%</b>	<b>64.7%</b>	<b>14.8%</b>	<b>2.9%</b>	<b>0.9%</b>	<b>-0.6%</b>

Source: Experian 'Retail Planner Briefing Note 18' (October 2020). Figures 1a and 1b.

**TABLE 4: TOTAL FORECAST GROWTH IN LEISURE SERVICES SPEND (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£2,282	£1,054	£2,172	£2,363	£2,471	£2,493
Zone 2	£2,179	£1,007	£2,074	£2,256	£2,359	£2,380
Zone 3	£2,312	£1,068	£2,200	£2,393	£2,503	£2,525
Zone 4	£2,624	£1,212	£2,497	£2,716	£2,841	£2,867
Zone 5	£2,367	£1,093	£2,253	£2,450	£2,562	£2,585
Zone 6	£2,374	£1,097	£2,260	£2,458	£2,570	£2,593
Zone 7	£3,428	£1,584	£3,263	£3,549	£3,712	£3,745
Zone 8	£2,622	£1,211	£2,496	£2,714	£2,839	£2,864
Zone 9	£2,314	£1,069	£2,202	£2,395	£2,505	£2,528
Zone 10	£2,456	£1,135	£2,337	£2,542	£2,659	£2,683
Zone 11	£2,005	£926	£1,908	£2,075	£2,170	£2,190
<b>STUDY AREA:</b>	<b>£2,451</b>	<b>£1,132</b>	<b>£2,333</b>	<b>£2,537</b>	<b>£2,654</b>	<b>£2,678</b>

**TABLE 4a: TOTAL FORECAST GROWTH IN SPEND ON ACCOMMODATION SERVICES (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£151	£70	£144	£156	£163	£165
Zone 2	£121	£56	£115	£125	£131	£132
Zone 3	£133	£62	£127	£138	£144	£145
Zone 4	£179	£83	£170	£185	£194	£195
Zone 5	£142	£66	£135	£147	£154	£155
Zone 6	£133	£62	£127	£138	£144	£145
Zone 7	£249	£115	£237	£258	£270	£273
Zone 8	£190	£88	£180	£196	£205	£207
Zone 9	£151	£70	£144	£156	£163	£165
Zone 10	£159	£74	£152	£165	£172	£174
Zone 11	£119	£55	£113	£123	£129	£130
<b>STUDY AREA:</b>	<b>£157</b>	<b>£73</b>	<b>£149</b>	<b>£163</b>	<b>£170</b>	<b>£172</b>

**TABLE 4b: TOTAL FORECAST GROWTH IN SPEND ON CULTURAL SERVICES (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£367	£170	£350	£380	£398	£401
Zone 2	£384	£177	£366	£398	£416	£420
Zone 3	£388	£179	£369	£401	£420	£423
Zone 4	£413	£191	£393	£427	£447	£451
Zone 5	£399	£184	£380	£413	£432	£436
Zone 6	£406	£187	£386	£420	£439	£443
Zone 7	£519	£240	£494	£538	£562	£567
Zone 8	£430	£199	£409	£445	£466	£470
Zone 9	£378	£175	£360	£392	£410	£413
Zone 10	£423	£195	£403	£438	£458	£462
Zone 11	£335	£155	£318	£346	£362	£365
<b>STUDY AREA:</b>	<b>£404</b>	<b>£187</b>	<b>£384</b>	<b>£418</b>	<b>£437</b>	<b>£441</b>

**TABLE 4c: TOTAL FORECAST GROWTH IN SPEND ON GAMES OF CHANCE (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£190	£88	£181	£197	£206	£208
Zone 2	£213	£98	£202	£220	£230	£232
Zone 3	£202	£93	£192	£209	£218	£220
Zone 4	£240	£111	£229	£249	£260	£262
Zone 5	£206	£95	£196	£213	£223	£225
Zone 6	£216	£100	£206	£224	£234	£236
Zone 7	£196	£91	£187	£203	£213	£215
Zone 8	£219	£101	£208	£226	£237	£239
Zone 9	£234	£108	£223	£242	£254	£256
Zone 10	£252	£116	£240	£261	£273	£275
Zone 11	£197	£91	£188	£204	£214	£215
<b>STUDY AREA:</b>	<b>£215</b>	<b>£99</b>	<b>£205</b>	<b>£223</b>	<b>£233</b>	<b>£235</b>

**TABLE 4d: TOTAL FORECAST GROWTH IN SPEND ON PERSONAL GROOMING (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£111	£51	£106	£115	£120	£121
Zone 2	£109	£50	£104	£113	£118	£119
Zone 3	£126	£58	£120	£131	£137	£138
Zone 4	£148	£69	£141	£154	£161	£162
Zone 5	£129	£60	£123	£133	£140	£141
Zone 6	£138	£64	£131	£142	£149	£150
Zone 7	£173	£80	£165	£179	£188	£189
Zone 8	£154	£71	£147	£160	£167	£169
Zone 9	£110	£51	£104	£114	£119	£120
Zone 10	£137	£63	£131	£142	£149	£150
Zone 11	£101	£47	£96	£104	£109	£110
<b>STUDY AREA:</b>	<b>£131</b>	<b>£60</b>	<b>£124</b>	<b>£135</b>	<b>£141</b>	<b>£143</b>

**TABLE 4e: TOTAL FORECAST GROWTH IN SPEND ON RECREATION & SPORTING SERVICES (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£144	£66	£137	£149	£155	£157
Zone 2	£154	£71	£147	£160	£167	£169
Zone 3	£180	£83	£172	£187	£195	£197
Zone 4	£214	£99	£204	£222	£232	£234
Zone 5	£173	£80	£164	£179	£187	£189
Zone 6	£171	£79	£163	£178	£186	£187
Zone 7	£274	£127	£261	£284	£297	£299
Zone 8	£212	£98	£202	£219	£229	£231
Zone 9	£197	£91	£188	£204	£213	£215
Zone 10	£173	£80	£165	£179	£188	£189
Zone 11	£138	£64	£131	£143	£149	£150
<b>STUDY AREA:</b>	<b>£185</b>	<b>£85</b>	<b>£176</b>	<b>£191</b>	<b>£200</b>	<b>£202</b>

**TABLE 4f: TOTAL FORECAST GROWTH IN SPEND ON FOOD & BEVERAGE (£ per capita)**

£ per capita:	2019	2020	2025	2030	2035	2036
Zone 1	£1,319	£610	£1,256	£1,366	£1,428	£1,441
Zone 2	£1,198	£553	£1,140	£1,240	£1,297	£1,308
Zone 3	£1,283	£593	£1,221	£1,328	£1,389	£1,401
Zone 4	£1,429	£660	£1,360	£1,480	£1,548	£1,561
Zone 5	£1,318	£609	£1,255	£1,365	£1,427	£1,440
Zone 6	£1,309	£605	£1,246	£1,356	£1,418	£1,430
Zone 7	£2,016	£931	£1,918	£2,087	£2,182	£2,202
Zone 8	£1,418	£655	£1,349	£1,468	£1,535	£1,549
Zone 9	£1,244	£575	£1,184	£1,287	£1,346	£1,358
Zone 10	£1,311	£606	£1,248	£1,357	£1,419	£1,432
Zone 11	£1,115	£515	£1,061	£1,155	£1,207	£1,218
<b>STUDY AREA:</b>	<b>£1,360</b>	<b>£628</b>	<b>£1,294</b>	<b>£1,408</b>	<b>£1,472</b>	<b>£1,486</b>

**TABLE 5: ALL LEISURE SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

	£ million:	2019	2020	2025	2030	2035	2036
Zone 1		£6.0	£3.3	£12.3	£15.6	£18.7	£19.4
Zone 2		£39.1	£18.1	£37.5	£41.2	£43.6	£44.1
Zone 3		£54.4	£25.2	£52.1	£57.0	£60.1	£60.7
Zone 4		£43.9	£20.3	£42.0	£46.2	£48.7	£49.3
Zone 5		£47.3	£22.1	£47.7	£53.9	£58.5	£59.4
Zone 6		£34.4	£16.1	£36.0	£39.8	£42.2	£42.7
Zone 7		£5.4	£4.6	£31.1	£57.6	£85.1	£90.8
Zone 8		£33.6	£15.5	£32.2	£35.4	£37.3	£37.8
Zone 9		£184.3	£86.1	£187.9	£215.4	£235.9	£240.1
Zone 10		£66.3	£30.9	£66.3	£74.6	£80.7	£81.8
Zone 11		£87.4	£40.8	£88.2	£100.3	£109.5	£111.5
<b>STUDY AREA - TOTAL:</b>		<b>£602.1</b>	<b>£283.1</b>	<b>£633.3</b>	<b>£737.0</b>	<b>£820.3</b>	<b>£837.5</b>

GROWTH (£m):		GROWTH (%):	
2019-30	2019-36	2019-30	2019-36
£9.6	£13.3	158.7%	220.7%
£2.1	£5.0	5.4%	12.7%
£2.6	£6.3	4.9%	11.6%
£2.2	£5.3	5.1%	12.1%
£6.6	£12.1	13.9%	25.6%
£5.4	£8.4	15.7%	24.4%
£52.3	£85.4	973.7%	1591.2%
£1.8	£4.2	5.2%	12.4%
£31.1	£55.8	16.9%	30.3%
£8.3	£15.5	12.5%	23.4%
£12.9	£24.1	14.8%	27.5%
<b>£135.0</b>	<b>£235.4</b>	<b>22.4%</b>	<b>39.1%</b>

	2019	2020	2025	2030	2035	2036
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£190.8	£88.9	£191.5	£214.0	£229.6	£232.8
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£73.3	£36.3	£99.3	£132.8	£164.6	£171.3
Zones 9-11 OUTSIDE BOROUGH	£338.0	£157.9	£342.4	£390.3	£426.1	£433.4
<b>STUDY AREA TOTAL:</b>	<b>£602.1</b>	<b>£283.1</b>	<b>£633.3</b>	<b>£737.0</b>	<b>£820.3</b>	<b>£837.5</b>

GROWTH (£m):		GROWTH (%):	
2019-30	2019-36	2019-30	2019-36
£23.2	£42.1	12.2%	22.1%
£59.4	£98.0	81.1%	133.6%
£52.3	£95.4	15.5%	28.2%
<b>£135.0</b>	<b>£235.4</b>	<b>22.4%</b>	<b>39.1%</b>

All Dartford Borough: £264.1 £125.2  
44.2%

**TABLE 5a: ACCOMMODATION SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

	£ million:	2019	2020	2025	2030	2035	2036
Zone 1		£0.4	£0.2	£0.8	£1.0	£1.2	£1.3
Zone 2		£2.2	£1.0	£2.1	£2.3	£2.4	£2.4
Zone 3		£3.1	£1.4	£3.0	£3.3	£3.5	£3.5
Zone 4		£3.0	£1.4	£2.9	£3.1	£3.3	£3.4
Zone 5		£2.8	£1.3	£2.9	£3.2	£3.5	£3.6
Zone 6		£1.9	£0.9	£2.0	£2.2	£2.4	£2.4
Zone 7		£0.4	£0.3	£2.3	£4.2	£6.2	£6.6
Zone 8		£2.4	£1.1	£2.3	£2.6	£2.7	£2.7
Zone 9		£12.0	£5.6	£12.3	£14.1	£15.4	£15.7
Zone 10		£4.3	£2.0	£4.3	£4.8	£5.2	£5.3
Zone 11		£5.2	£2.4	£5.2	£6.0	£6.5	£6.6
<b>STUDY AREA - TOTAL:</b>		<b>£37.8</b>	<b>£17.8</b>	<b>£40.0</b>	<b>£46.8</b>	<b>£52.3</b>	<b>£53.5</b>

GROWTH (£m):	
2019-30	2019-36
£0.6	£0.9
£0.1	£0.3
£0.2	£0.4
£0.2	£0.4
£0.4	£0.7
£0.3	£0.5
£3.8	£6.2
£0.1	£0.3
£2.0	£3.6
£0.5	£1.0
£0.8	£1.4
<b>£9.0</b>	<b>£15.7</b>

	2019	2020	2025	2030	2035	2036
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£11.5	£5.4	£11.6	£13.0	£14.0	£14.2
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£4.7	£2.4	£6.6	£9.0	£11.3	£11.7
Zones 9-11 OUTSIDE BOROUGH	£21.5	£10.0	£21.8	£24.8	£27.1	£27.6
<b>STUDY AREA TOTAL:</b>	<b>£37.8</b>	<b>£17.8</b>	<b>£40.0</b>	<b>£46.8</b>	<b>£52.3</b>	<b>£53.5</b>

GROWTH (£m):	
2019-30	2019-36
£1.5	£2.6
£4.2	£7.0
£3.3	£6.1
<b>£9.0</b>	<b>£15.7</b>

**TABLE 5b: CULTURAL SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

	£ million:	2019	2020	2025	2030	2035	2036
Zone 1		£1.0	£0.5	£2.0	£2.5	£3.0	£3.1
Zone 2		£6.9	£3.2	£6.6	£7.3	£7.7	£7.8
Zone 3		£9.1	£4.2	£8.7	£9.6	£10.1	£10.2
Zone 4		£6.9	£3.2	£6.6	£7.3	£7.7	£7.8
Zone 5		£8.0	£3.7	£8.1	£9.1	£9.9	£10.0
Zone 6		£5.9	£2.8	£6.1	£6.8	£7.2	£7.3
Zone 7		£0.8	£0.7	£4.7	£8.7	£12.9	£13.8
Zone 8		£5.5	£2.5	£5.3	£5.8	£6.1	£6.2
Zone 9		£30.1	£14.1	£30.7	£35.2	£38.6	£39.3
Zone 10		£11.4	£5.3	£11.4	£12.9	£13.9	£14.1
Zone 11		£14.6	£6.8	£14.7	£16.7	£18.3	£18.6
<b>STUDY AREA - TOTAL:</b>		<b>£100.2</b>	<b>£47.1</b>	<b>£105.0</b>	<b>£121.8</b>	<b>£135.3</b>	<b>£138.1</b>

GROWTH (£m):	
2019-30	2019-36
£1.5	£2.1
£0.4	£0.9
£0.4	£1.1
£0.4	£0.8
£1.1	£2.0
£0.9	£1.4
£7.9	£12.9
£0.3	£0.7
£5.1	£9.1
£1.4	£2.7
£2.2	£4.0
<b>£21.6</b>	<b>£37.8</b>

	2019	2020	2025	2030	2035	2036
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£31.9	£14.9	£32.0	£35.7	£38.3	£38.8
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£12.2	£6.0	£16.1	£21.3	£26.2	£27.3
Zones 9-11 OUTSIDE BOROUGH	£56.1	£26.2	£56.9	£64.8	£70.7	£72.0
<b>STUDY AREA TOTAL:</b>	<b>£100.2</b>	<b>£47.1</b>	<b>£105.0</b>	<b>£121.8</b>	<b>£135.3</b>	<b>£138.1</b>

GROWTH (£m):	
2019-30	2019-36
£3.8	£7.0
£9.1	£15.1
£8.7	£15.8
<b>£21.6</b>	<b>£37.8</b>

**TABLE 5c: GAMES OF CHANCE - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

£ million:	2019	2020	2025	2030	2035	2036
Zone 1	£0.5	£0.3	£1.0	£1.3	£1.6	£1.6
Zone 2	£3.8	£1.8	£3.7	£4.0	£4.3	£4.3
Zone 3	£4.7	£2.2	£4.5	£5.0	£5.2	£5.3
Zone 4	£4.0	£1.9	£3.8	£4.2	£4.5	£4.5
Zone 5	£4.1	£1.9	£4.1	£4.7	£5.1	£5.2
Zone 6	£3.1	£1.5	£3.3	£3.6	£3.9	£3.9
Zone 7	£0.3	£0.3	£1.8	£3.3	£4.9	£5.2
Zone 8	£2.8	£1.3	£2.7	£2.9	£3.1	£3.1
Zone 9	£18.7	£8.7	£19.0	£21.8	£23.9	£24.3
Zone 10	£6.8	£3.2	£6.8	£7.7	£8.3	£8.4
Zone 11	£8.6	£4.0	£8.7	£9.9	£10.8	£11.0
<b>STUDY AREA - TOTAL:</b>	<b>£57.5</b>	<b>£26.9</b>	<b>£59.5</b>	<b>£68.4</b>	<b>£75.4</b>	<b>£76.8</b>

**GROWTH (£m):**

2019-30	2019-36
£0.8	£1.1
£0.2	£0.5
£0.2	£0.6
£0.2	£0.5
£0.6	£1.1
£0.5	£0.8
£3.0	£4.9
£0.1	£0.3
£3.1	£5.6
£0.8	£1.6
£1.3	£2.4
<b>£10.9</b>	<b>£19.3</b>

2019	2020	2025	2030	2035	2036	
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£17.2	£8.0	£17.2	£19.2	£20.6	£20.9
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£6.2	£3.0	£7.7	£9.9	£11.8	£12.2
Zones 9-11 OUTSIDE BOROUGH	£34.1	£15.9	£34.5	£39.3	£42.9	£43.7
<b>STUDY AREA TOTAL:</b>	<b>£57.5</b>	<b>£26.9</b>	<b>£59.5</b>	<b>£68.4</b>	<b>£75.4</b>	<b>£76.8</b>

**GROWTH (£m):**

2019-30	2019-36
£2.0	£3.7
£3.6	£6.0
£5.3	£9.6
<b>£10.9</b>	<b>£19.3</b>

**TABLE 5d: PERSONAL GROOMING - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

£ million:	2019	2020	2025	2030	2035	2036
Zone 1	£0.3	£0.2	£0.6	£0.8	£0.9	£0.9
Zone 2	£2.0	£0.9	£1.9	£2.1	£2.2	£2.2
Zone 3	£3.0	£1.4	£2.8	£3.1	£3.3	£3.3
Zone 4	£2.5	£1.1	£2.4	£2.6	£2.8	£2.8
Zone 5	£2.6	£1.2	£2.6	£2.9	£3.2	£3.2
Zone 6	£2.0	£0.9	£2.1	£2.3	£2.4	£2.5
Zone 7	£0.3	£0.2	£1.6	£2.9	£4.3	£4.6
Zone 8	£2.0	£0.9	£1.9	£2.1	£2.2	£2.2
Zone 9	£8.7	£4.1	£8.9	£10.2	£11.2	£11.4
Zone 10	£3.7	£1.7	£3.7	£4.2	£4.5	£4.6
Zone 11	£4.4	£2.1	£4.4	£5.1	£5.5	£5.6
<b>STUDY AREA - TOTAL:</b>	<b>£31.4</b>	<b>£14.7</b>	<b>£32.9</b>	<b>£38.2</b>	<b>£42.5</b>	<b>£43.4</b>

**GROWTH (£m):**

2019-30	2019-36
£0.5	£0.6
£0.1	£0.2
£0.1	£0.3
£0.1	£0.3
£0.4	£0.7
£0.3	£0.5
£2.6	£4.3
£0.1	£0.2
£1.5	£2.6
£0.5	£0.9
£0.7	£1.2
<b>£6.9</b>	<b>£12.0</b>

2019	2020	2025	2030	2035	2036	
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£10.3	£4.8	£10.3	£11.5	£12.3	£12.5
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£4.2	£2.1	£5.6	£7.3	£8.9	£9.3
Zones 9-11 OUTSIDE BOROUGH	£16.8	£7.9	£17.1	£19.4	£21.2	£21.6
<b>STUDY AREA TOTAL:</b>	<b>£31.4</b>	<b>£14.7</b>	<b>£32.9</b>	<b>£38.2</b>	<b>£42.5</b>	<b>£43.4</b>

**GROWTH (£m):**

2019-30	2019-36
£1.2	£2.2
£3.1	£5.1
£2.6	£4.7
<b>£6.9</b>	<b>£12.0</b>

**TABLE 5e: RECREATION & SPORTING SERVICES - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

£ million:	2019	2020	2025	2030	2035	2036
Zone 1	£0.4	£0.2	£0.8	£1.0	£1.2	£1.2
Zone 2	£2.8	£1.3	£2.7	£2.9	£3.1	£3.1
Zone 3	£4.2	£2.0	£4.1	£4.4	£4.7	£4.7
Zone 4	£3.6	£1.7	£3.4	£3.8	£4.0	£4.0
Zone 5	£3.5	£1.6	£3.5	£3.9	£4.3	£4.3
Zone 6	£2.5	£1.2	£2.6	£2.9	£3.1	£3.1
Zone 7	£0.4	£0.4	£2.5	£4.6	£6.8	£7.3
Zone 8	£2.7	£1.3	£2.6	£2.9	£3.0	£3.0
Zone 9	£15.7	£7.3	£16.0	£18.4	£20.1	£20.5
Zone 10	£4.7	£2.2	£4.7	£5.3	£5.7	£5.8
Zone 11	£6.0	£2.8	£6.1	£6.9	£7.5	£7.7
<b>STUDY AREA - TOTAL:</b>	<b>£46.4</b>	<b>£21.8</b>	<b>£48.8</b>	<b>£56.9</b>	<b>£63.4</b>	<b>£64.7</b>

**GROWTH (£m):**

2019-30	2019-36
£0.6	£0.8
£0.2	£0.4
£0.2	£0.5
£0.2	£0.4
£0.5	£0.9
£0.4	£0.6
£4.2	£6.8
£0.1	£0.3
£2.7	£4.8
£0.6	£1.1
£0.9	£1.7
<b>£10.5</b>	<b>£18.3</b>

2019	2020	2025	2030	2035	2036	
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£14.4	£6.7	£14.4	£16.1	£17.2	£17.4
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£5.6	£2.8	£7.7	£10.3	£12.9	£13.4
Zones 9-11 OUTSIDE BOROUGH	£26.4	£12.3	£26.8	£30.5	£33.3	£33.9
<b>STUDY AREA TOTAL:</b>	<b>£46.4</b>	<b>£21.8</b>	<b>£48.8</b>	<b>£56.9</b>	<b>£63.4</b>	<b>£64.7</b>

**GROWTH (£m):**

2019-30	2019-36
£1.6	£3.0
£4.7	£7.8
£4.1	£7.5
<b>£10.5</b>	<b>£18.3</b>

**TABLE 5f: FOOD & BEVERAGE - TOTAL AVAILABLE EXPENDITURE FORECASTS (£ million)**

£ million:	2019	2020	2025	2030	2035	2036
Zone 1	£3.5	£1.9	£7.1	£9.0	£10.8	£11.2
Zone 2	£21.5	£9.9	£20.6	£22.7	£24.0	£24.2
Zone 3	£30.2	£14.0	£28.9	£31.7	£33.3	£33.7
Zone 4	£23.9	£11.1	£22.9	£25.1	£26.5	£26.8
Zone 5	£26.4	£12.3	£26.6	£30.0	£32.6	£33.1
Zone 6	£18.9	£8.9	£19.8	£21.9	£23.3	£23.6
Zone 7	£3.2	£2.7	£18.3	£33.9	£50.0	£53.4
Zone 8	£18.2	£8.4	£17.4	£19.1	£20.2	£20.4
Zone 9	£99.0	£46.3	£101.0	£115.8	£126.8	£129.0
Zone 10	£35.4	£16.5	£35.4	£39.8	£43.1	£43.7
Zone 11	£48.6	£22.7	£49.1	£55.8	£60.9	£62.0
<b>STUDY AREA - TOTAL:</b>	<b>£328.8</b>	<b>£154.7</b>	<b>£347.1</b>	<b>£404.8</b>	<b>£451.5</b>	<b>£461.1</b>

**GROWTH (£m):**

2019-30	2019-36
£5.5	£7.7
£1.2	£2.7
£1.5	£3.5
£1.2	£2.9
£3.7	£6.7
£3.0	£4.6
£30.7	£50.2
£1.0	£2.2
£16.7	£30.0
£4.4	£8.3
£7.2	£13.4
<b>£76.1</b>	<b>£132.4</b>

2019	2020	2025	2030	2035	2036	
Zones 1-5 DARTFORD WEST (incl Dartford Tov	£105.4	£49.2	£106.1	£118.5	£127.2	£129.0
Zones 6-8 DARTFORD EAST (incl Bluewater / E	£40.3	£20.0	£55.5	£74.9	£93.5	£97.4
Zones 9-11 OUTSIDE BOROUGH	£183.1	£85.5	£185.5	£211.4	£230.8	£234.7
<b>STUDY AREA TOTAL:</b>	<b>£328.8</b>	<b>£154.7</b>	<b>£347.1</b>	<b>£404.8</b>	<b>£451.5</b>	<b>£461.1</b>

2019-30	2019-36	2019-30	2019-36
£13.1	£23.6	12.4%	22.4%
£34.7	£57.1	86.1%	141.8%
£28.3	£51.7	15.5%	28.2%
<b>£76.1</b>	<b>£132.4</b>	<b>23.1%</b>	<b>40.3%</b>

