

Northfleet Harbourside
Retail Impact Assessment

Table 1 - Population

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2022	58,456	26,112	15,856	32,769	88,366	6,242	9,174	29,971	266,946
2027	62,267	28,355	16,241	33,326	89,198	6,259	9,200	30,588	275,434
2032	65,083	30,069	16,482	33,764	90,068	6,259	9,265	31,081	282,071

Notes

1. Population provided by Experian - 2021 mid-year estimates, projected forward using ONS 2018-based subnational population projections, which were released in March 2020.

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Table 2 - Per Capita Expenditure - Comparison Goods

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2022	£3,873	£4,101	£5,133	£4,971	£3,714	£5,026	£5,093	£4,326
2027	£4,117	£4,359	£5,456	£5,284	£3,947	£5,342	£5,391	£4,580
2032	£4,726	£5,004	£6,263	£6,066	£4,532	£6,133	£6,189	£5,258

Notes

- 1. 2020 figure provided by Experian
- 2. Price base adjusted to from 2020 to 2018 using Appendix 4B of Experian Retail Planner Briefing Note 19 (January 20202)
- 3. Grown in accordance with Figures 1a and 1b of Experian Retail Planner Briefing Note 20 (January 2023)
- 4. Does not exclude SFT

2018 Prices

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Table 3 - Total Available Expenditure - Comparison Goods (£m)

Zone	Zone 1	Minus SFT	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total	Total minus SFT	Growth
2022	£226.42	£165.29	£107.09	£81.39	£162.91	£328.18	£31.37	£46.72	£129.66	£1,113.75	£813.04	
2027	£256.34	£181.49	£123.60	£88.60	£176.09	£352.09	£33.43	£49.60	£140.09	£1,219.84	£863.64	6.22%
2032	£307.60	£212.55	£150.47	£103.23	£204.81	£408.15	£38.38	£57.34	£163.42	£1,433.42	£990.49	14.69%

Notes

- 1. Table 1 x Table 2
- 2. SFT deducted in accordance with Figure 5, Appendix 3 of Retail Planner Briefing Note 20 (February 2023)

2018 Prices

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Table 4 - Turnover of Proposed Development

	Gross External Area	Gross Internal Area	Net Retail Sales Floorspace	Net Comparison Floorspace	Sales Density	Turnover (£m)
	(sq. m)	(sq. m)	(sq. m)	(sq. m)	(£/sq. m)	
Retail	22,500	21,375	17,100	16,245	6,500	£106.86
F&B	9,500		7,600		6,500	£51.21
Other Local / Community Uses	1,100	1,045	836	418	4,000	£1.69

Notes

1. Net Retail Floorspace assumed to be 80% of GEA
2. Sales density as stated on Retail Scoping Note
3. 50% Local Community Use floorspace assumed to be for retail sales
4. GIA assumed to be 95% of GEA

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Table 5 - Pre-Development Turnover 2022 - Comparison Goods

Store / Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Gravesend Town Centre	£2.54	£2.93	£4.90	£0.50	£74.89	£1.63	£2.20	£0.00	£89.58
Gravesend Edge / Out-of-Centre	£1.27	£5.53	£8.52	£3.38	£45.61	£5.57	£3.60	£0.04	£73.53
Dartford Town Centre	£52.89	£8.90	£3.41	£7.81	£15.63	£0.45	£0.34	£9.13	£98.57
Dartford Edge / Out of Centre	£3.14	£0.06	£0.61	£0.53	£2.34	£0.09	£0.35	£1.68	£8.80
Bluewater Shopping Centre	£60.29	£36.41	£31.70	£34.56	£66.44	£7.94	£11.38	£28.12	£276.84
Other Centres in Catchment Area									
Longfield Villiage Centre	£0.11	£0.00	£1.80	£3.13	£0.00	£0.04	£0.01	£0.00	£5.10
Other Centres in Catchment Area	£2.47	£2.59	£0.87	£4.16	£2.89	£0.71	£2.00	£6.45	£22.15
Other Centres in Catchment Area Total	£2.58	£2.59	£2.67	£7.29	£2.89	£0.75	£2.01	£6.45	£27.25
Other stores in Catchment Area									
Other stores in Catchment Area	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£1.67	£1.73
Other stores in Catchment Area Total	£3.90	£10.96	£0.22	£4.53	£3.06	£0.00	£0.10	£12.39	£35.16
Catchment Area Total	£126.60	£67.38	£52.03	£58.61	£210.87	£16.43	£19.99	£57.81	£609.73
Other Centres Outside Catchment Area									
Sevenoaks Town Centre	£0.00	£0.00	£0.14	£12.02	£0.32	£0.00	£0.62	£2.14	£15.25
Orpington Town Centre	£0.67	£0.00	£1.16	£3.14	£0.41	£0.00	£0.05	£2.50	£7.92
Crayford Town Centre	£3.66	£0.96	£0.16	£0.00	£0.00	£0.00	£0.00	£2.14	£6.93
Royal Tunbridge Wells Town Centre	£0.00	£0.00	£0.00	£4.74	£0.00	£0.00	£0.12	£0.00	£4.87
Central London / West End	£0.11	£0.23	£0.16	£0.73	£5.79	£0.67	£0.31	£0.78	£8.77
Other Centres Outside Catchment Area	£2.59	£0.44	£0.69	£5.55	£4.02	£1.79	£0.50	£4.47	£20.06
Other Centres Outside Catchment Area Total	£7.03	£1.64	£2.31	£26.18	£10.54	£2.46	£1.60	£12.04	£63.80
Other Stores Outside Catchment Area									
Lakeside / Wrest Thurrock	£4.81	£2.20	£2.10	£3.17	£6.08	£0.30	£1.00	£0.96	£20.62
Nugent Shopping Park, Orpington	£0.00	£0.00	£0.00	£2.53	£0.00	£0.00	£0.00	£7.09	£9.62
Tower Retail Park, Crayford	£24.06	£6.25	£1.53	£2.30	£4.79	£0.00	£0.35	£2.40	£41.69
Springvale Retail Park, Orpington	£0.15	£0.00	£0.09	£5.67	£0.26	£0.30	£0.06	£7.85	£14.38
South Aylesford Retail Park, Aylesford	£0.00	£0.00	£0.00	£2.46	£0.00	£0.00	£1.17	£0.00	£3.63
Other Stores Outside Catchment Area	£2.63	£0.59	£0.83	£17.36	£7.02	£3.41	£1.22	£6.43	£39.49
Other Stores Outside Catchment Area Total	£31.66	£9.04	£4.53	£33.49	£18.16	£4.01	£3.80	£24.74	£129.44
TOTAL	£165.29	£78.06	£58.88	£118.28	£239.57	£22.90	£25.38	£94.59	£802.96

Notes

1. Based on results of household survey

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Table 6 - Commitments

Commitment	Comparison Net Sales Area	Estimated Survey Derived Comparison Turnover	Convenience Net Sales Area	Estimated Survey Derived Convenience Turnover
	sq. m	£m	sq. m	£m
Ebbfleet Central	9,675	£40.60	4,031	£28.20
Eastern Quarry	1,932	£9.30	2,292	£18.30
Total	11,607	£49.90	6,323	£46.50

Notes

1. Details of Comparison Turnover taken from Tables 7 and 10 of Retail Impact Assessment for Planning App Ref.EDC/22/0168
2. Details of Convenience Turnover taken from Tables 7 and 10 of Retail Impact Assessment for Planning App Ref.EDC/22/0168

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Table 7 - Comparison Trade Diversion - 2027 & 2032

Centre	Pre-Development Turnover £m			Total Diversion to Ebbsfleet Central and Eastern Quarry	Diversion to Proposal		Survey Derived Post Development Turnover £m		Direct Impact		Cumulative Comparison Impact		Change in Turnover	
	2022	2027	2032		2027	2032	2027	2032	2027	2032	2027	2032	2022 - 2027	2022 - 2032
Gravesend Town Centre	£89.58	£93.89	£102.53	3.62	£3.76	£3.76	£86.52	£95.15	4.00%	3.66%	7.86%	7.19%	-£3.07	£5.56
Gravesend Edge / Out-of-Centre	£73.53	£77.06	£84.15	1.40	£1.21	£1.21	£74.45	£81.54	1.57%	1.44%	3.39%	3.10%	£0.92	£8.01
Dartford Town Centre	£98.57	£103.31	£112.80	4.09	£2.43	£2.43	£96.79	£106.29	2.35%	2.15%	6.30%	5.77%	-£1.77	£7.73
Dartford Edge / Out of Centre	£8.80	£9.22	£10.07	0.59	£0.00	£0.00	£8.63	£9.48	0.00%	0.00%	6.42%	5.88%	-£0.17	£0.68
Bluewater	£1,165.64	£1,221.70	£1,334.02	29.94	£60.72	£60.72	£1,131.04	£1,243.36	4.97%	4.55%	7.42%	6.80%	-£34.60	£77.72
Other Stores / Centres in Catchment Area	£62.41	£65.41	£68.56	0.56	£2.20	£2.20	£62.65	£65.80	3.37%	3.21%	4.22%	4.02%	£0.24	£3.39
Other Stores / Centres Outside Catchment Area	£193.23	£202.53	£212.27	9.70	£9.78	£9.78	£183.05	£192.79	-	-	-	-	-	-

Notes

1. Trade Draw patterns based on Montagu Evans Assumptions
2. Direct Impact on Turnover from PCA only (apart from Bluewater, see note (3) below)
3. Expenditure from PCA assumed to be 25% of Bluewater's turnover from its own PCA (95% of its total turnover). An allowance for a further 5% inflow has been included in line with Retail Assessment for Dartford Application Ref. 16/01207/OUT (Table A4, Appendix 7)
4. Diversion to Ebbsfleet Central based on Table 13 of Appendix 4 of Retail Impact Assessment for Planning App Ref. EDC/22/0168
5. Diversion to Eastern Quarry based on Table 8 of Appendix 4 of Retail Impact Assessment for Planning App Ref. EDC/22/0168 and ME assumptions

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Table 8- Total Impact

Centre	Total Pre-Developmnet Turnover			Diversion to Proposal and Commitments		Total Post-Developmnet and Commitmemts Turnover		Total Impct of Proposal and Commitments		Change in Turnover	
	2022	2027	2032	2027	2032	2027	2032	2027	2032	2022 - 2027	2022 - 2032
Gravesend Town Centre	£110.92	£115.87	£124.95	£4.50	£4.50	£111.37	£120.45	3.89%	3.60%	£0.45	£9.53
Dartford Town Centre	£148.53	£154.78	£165.32	£4.50	£4.50	£150.28	£160.82	2.91%	2.72%	£1.75	£12.29
Bluewater	£1,251.12	£1,309.76	£1,423.86	£64.52	£64.52	£1,245.24	£1,359.34	4.93%	4.53%	-£5.88	£108.22

Notes

1. Includes convenience impact of commitments based on Tables 4, 8, and 14 of Appendix 5 of Retail Impact Assesmet for Planning App Ref.EDC/22/0168 and ME assumptions

2. Convenience imapcts assume some trade diversion from Easten Quarry to Ebbsfleet Central, in line with Table 14 of Appendix 5 of Retail Impact Assesmet for Planning App Ref.EDC/22/0168 and ME assumptions

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Table 9A - Per Capita Spend for F&B Floorspace

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2022	£1,449.84	£1,579.83	£1,788.14	£1,756.48	£1,366.52	£1,758.14	£1,743.14	£1,578.16	£13,020.25
2027	£1,416.25	£1,543.22	£1,746.70	£1,715.77	£1,334.85	£1,717.40	£1,702.75	£1,541.59	£12,718.55
2032	£1,484.07	£1,617.13	£1,830.36	£1,797.95	£1,398.78	£1,799.65	£1,784.30	£1,615.42	£13,327.66

Notes

1. Leisure Spend grown in line with Figures 1a and 1b of Retail Planner Briefing Note 20 (February 2023)
2. 2020 figure provided by Experian

Table 9B - Total Available Restaurant and Café Spend (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2022	£84.75	£41.25	£28.35	£57.56	£120.75	£10.97	£15.99	£47.30	£406.93
2027	£88.19	£43.76	£28.37	£57.18	£119.07	£10.75	£15.67	£47.15	£410.13
2032	£96.59	£48.63	£30.17	£60.71	£125.99	£11.26	£16.53	£50.21	£440.08
Growth 2022 - 2032	£11.84	£7.37	£1.82	£3.15	£5.23	£0.29	£0.54	£2.91	£33.14

Table 9C - Turnover of Proposed Development

	Gross External Area	Gross Internal Area	Net Leisure Floorspace	Sales Density	Turnover	Turnover from Study Area
	(sq. m)	(sq. m)	(sq. m)	(£/sq. m)	£m	£m
Food and Beverage	9,500	9,025	7,220	5,000	36.10	27.08

Notes

1. Sales density of leisure floorspace based on Montagu Evans assumptions
2. Experian Retail Planner Briefing Note 20 does not provide efficiency growth for leisure floorspace
3. GIA assumed to be 95% of GIA
4. Net floorspace assumed to be 80% of GIA