

Bakerloo Line Extension Update

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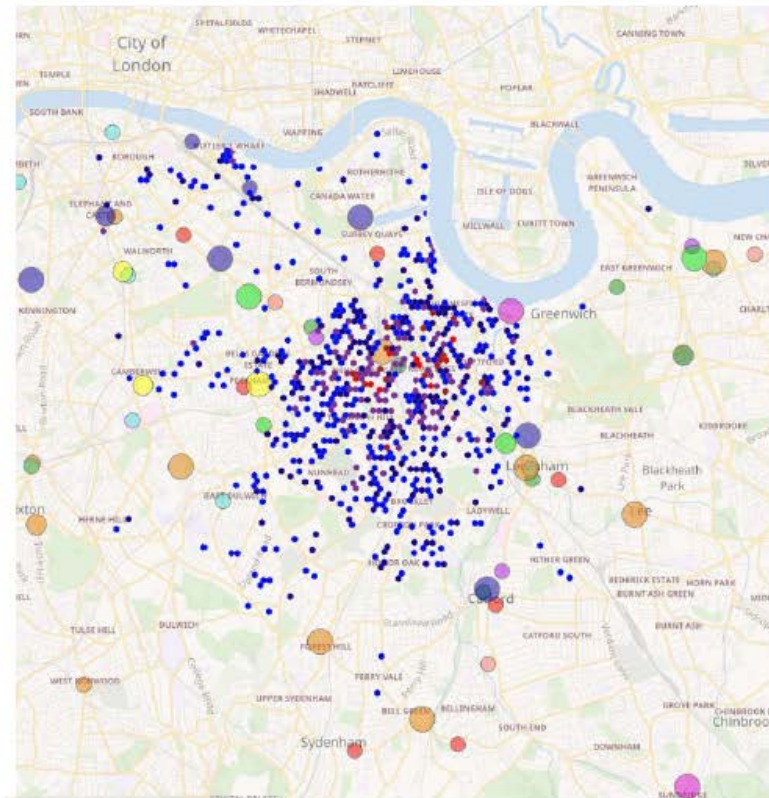
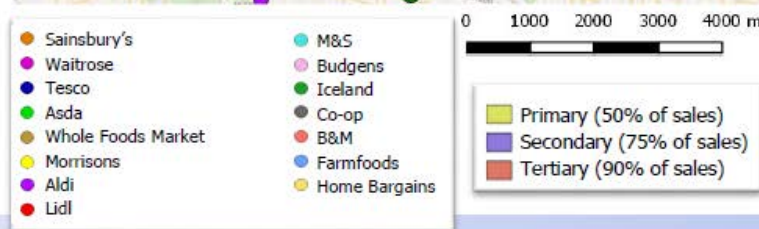
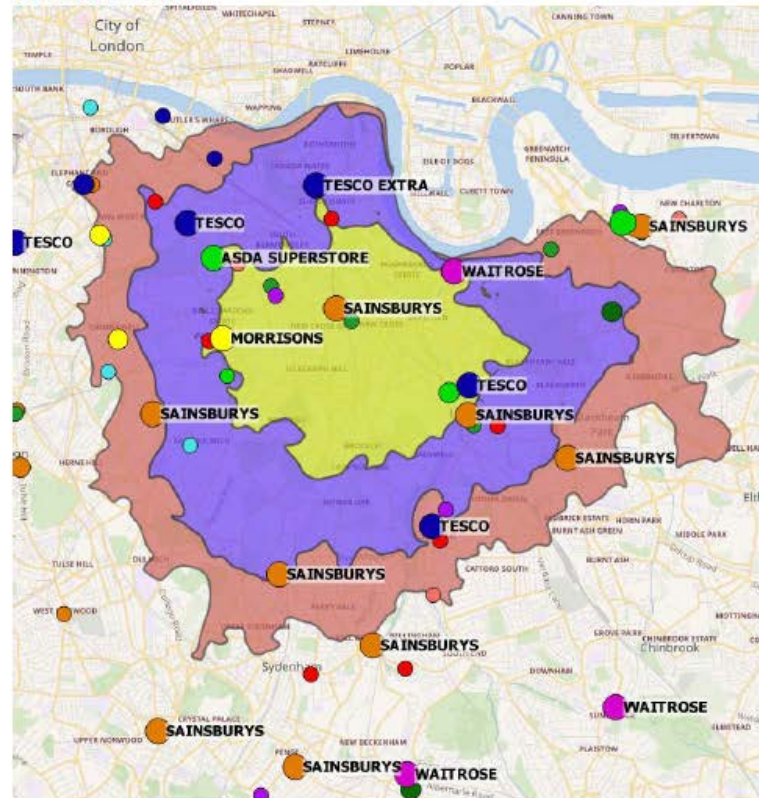
Retail Impacts Study - introduction

- Considered all scenarios of potential grocery store closures based on consulted and suggested station sites on route.
- Study explored effect of diverted consumer spend, including Petrol Filling Stations and also Pharmacy services, and infers effect on employment (loss of).
- The study considered a range of variables:
 - Drive times;
 - A range of factors within ORC's proprietary lifestyle and demographic model (LifePro);
 - Store size and range of goods offered;
- Undertaken at a detailed spatial level of 100 metre hex grid.



SUPERMARKET CATCHMENTS, 2018

SAINSBURY'S



Retail Impacts Study - findings

- Key conclusion is that the range of alternative grocers, their size and distance relative to Sainsbury's site means the impacts of BLE causing extinguishment are not disproportionate.
- It was noted that the catchment area for sales of the Sainsbury's store is relatively large compared to similar sized local competitors in Southwark and Lewisham.
- Consumer spend diverts locally to a range of other major stores, and a large portion of employment is forecast to divert to service that demand.
- Price points of alternatives suggests there should be no significant impact on the size of the basket of goods obtainable for their standard spend.
- PFS and Pharmacy is catered for by local alternatives.

