Bromley North Village Improvement Scheme Impact Review

A Final Report by Regeneris Consulting
Bromley North Village Improvement Scheme Impact Review

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Regeneris Consulting Ltd
www.regeneris.co.uk
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1. **Introduction**

1.1 Over the period 2012-2015, a series of capital and revenue interventions were delivered in Bromley North Village as part of a programme to enhance the vitality and vibrancy of Bromley Town Centre.

1.2 This independent report provides an update on how the interventions have bedded in, focusing on their impacts on town centre performance and on local perceptions and use of the area.

**Bromley North Village Improvement Scheme**

1.3 Bromley North Village forms part of Bromley Town Centre, one of London’s metropolitan centres. The village is located at the north end of the town centre, and, while not formally delineated, broadly comprises East Street, Widmore Street, West Street, Market Square and High Street (north of Market Square only).

1.4 LB Bromley was awarded £2.0 million from the Mayor of London’s Outer London Fund (OLF) Round 2 in early 2012, to deliver a series of capital and revenue interventions in Bromley town centre over the period of 2012-2014.

1.5 The aim of the project was to deliver a more vibrant and competitive town centre, improving accessibility, and making it more attractive and distinctive with better public spaces.

1.6 While the programme covered the town centre as a whole, a number of the interventions focused on Bromley North Village. These included significant public realm upgrades, a shop front improvement programme, and wayfinding and signage enhancements. The area also benefited from a wider programme of business support and from a town centre wide marketing and events programme.

**Purpose of this Report**

1.7 A full and independent evaluation of the full programme was undertaken soon after the completion of delivery in spring 2015.

1.8 This report has been commissioned by the London Borough of Bromley to provide an ‘18 months on’ perspective on the impact of the interventions, focusing specifically on the Bromley North Village elements of the programme.

1.9 The report draws on both secondary data on town centre performance and new primary research focusing on the experiences of town centre users and businesses:

- Chapter 2 – background to the Bromley North Village Improvement Scheme
- Chapter 3 – update on town centre performance and scheme impacts
- Chapter 4 – conclusions and next steps.
2. Bromley North Village Improvement Scheme

2.1 This chapter provides an overview of the background to the Bromley North Village Improvement Scheme, including objectives, projects delivered, and an overview of early findings on the success of the scheme from the evaluation undertaken immediately post-delivery in 2015.

Project Background and Objectives

2.2 Bromley town centre is classified as one of London’s metropolitan centres, reflecting the size of the town centre area and relative importance in London’s town centre hierarchy as a retail and leisure destination. While the town centre serves a catchment across south east London and north Kent, it faces strong competition from other retail centres in the sub-region, including Croydon town centre and Bluewater shopping centre.

2.3 In the face of increasing evidence that Bromley had been losing ground to these competitors in recent years, an area action plan for the town centre was developed in 2010, focused around ambitions to improve the image and perceptions of the town centre and providing a framework to manage development and change in the town centre over the coming decade.

2.4 Bromley town centre subsequently secured funding from Rounds 1 and 2 of the OLF, totalling around £300,000 and £2.0 million respectively. Both projects were targeted at working towards the objectives of the Area Action Plan, with the ultimate purpose of creating a more vibrant and prosperous high street which is economically sustainable into the medium and longer term.

2.5 Building on smaller scale revenue interventions delivered under the OLF Round 1 in 2011, delivery of the Round 2 project commenced in 2012, aiming to support Bromley to become:

- A more vibrant and competitive town centre with an extended offer as a place to shop, work, spend leisure time and live
- A high quality and safe environment especially in the evenings
- A successful day and night time centre
- An attractive & distinctive centre with high quality buildings, public spaces and connections
- An accessible and inclusive centre, promoting travel choice and supporting the need of all;
- A Bromley that looks to the future whilst protecting and enhancing the heritage of Bromley North Village and other important areas.

2.6 While the programme covered the town centre as a whole, particular focus was placed on the Bromley North Village area. This reflected a number of factors, including:

- Concerns that the area was underperforming compared to the wider town centre in terms of appearance and quality of the environment, footfall, vacancy and overall vibrancy
- Concerns that Bromley North Village did not form a coherent part of the wider town centre, in terms of both accessibility and identity
- An acknowledgment of the strong potential of the North Village area, given its historic environment and distinct character in relation to the core town centre area.

2.7 In this context, specific objectives for Bromley North Village focused on enhancing the environment of the area, creating a more diverse offer (focusing on the food and drink and evening economies), and improving wayfinding to and through the area. The ultimate aim was to create a more distinct identity for the North Village and in doing so enhance footfall and overall economic vitality.
# Projects Delivered

2.8 The project comprised a number of strands of delivery which are summarised below. Core place making and enhancement interventions focused in Bromley North Village are highlighted in green.

## Table 2.1 Bromley Outer London Fund Scheme: Projects Delivered

<table>
<thead>
<tr>
<th>Theme</th>
<th>Delivery Strand</th>
<th>Focus</th>
<th>Aims</th>
<th>Delivery</th>
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</table>
| **Public realm and Wayfinding** | North Village Public Realm Improvement Programme | Bromley North Village | • Lift the quality and appeal of the public realm in Bromley North Village and Market Square  
• Create better and more legible linkages between the North Village, Market Square and the rest of the town  
• Introduce improved infrastructure for town centre markets. | • Improved public realm across the area with consistent footpath treatment and street furniture design  
• Improved crossings and pedestrian links (eg Church Road / Widmore Street; link to the Hill Car Park)  
• Relocation of bus stops to encourage stronger footfall. |
| | Physical improvements, Bromley South to Market Square | Bromley central and south | • Lift the quality and visual appeal of the public realm, creating a consistent look throughout the town centre  
• Create a high-quality arrival environment at Bromley South  
• Create better and more legible linkages between Bromley South Station and the development at St. Mark’s Square. | • Improvements to pedestrian crossings  
• Improvements to Bromley South Station drop off area  
• Creation of links with green spaces and tree planting. |
| | Welcome Strategy and Way Finding | Town centre wide | • Create and enhance linkages between the high street and green spaces  
• Improve the overall legibility of the town through decluttering and the introduction of formal and informal way finding and improved lighting.  
• Enhance the character and sense of place of the town centre through the installation of high impact “Welcoming” sings at the two major gateways | • Installation of Legible London signs, a Bromley North sign and a Bromley North Village mural  
• Lighting of Churchill Theatre and St. Mark’s Church  
• The installation of additional bus stop seating with wayfinding features. |
| **Shopfront Improvements** | Bromley North Village Shop Front Improvements | Bromley North Village | • Reduce the negative visual impact of vacant & poor condition shopfronts  
• Complement wider programme of physical improvements of the public realm, resulting in a holistic uplift in appearance and attractiveness  
• Encourage private sector investment into the historic core of the town  
• Encourage consumer footfall and promote café culture. | • A shop front improvement scheme concentrated in priority areas in High Street North and East Street in Bromley North Village.  
• 28 improved shopfronts were delivered in total in Bromley North Village. |
| **Marketing and Events** | ‘Are You Bromley?’ marketing and events | Town centre wide | • To publicly highlight and celebrate both the heritage assets and the positive changes which are due to take place in the town centre  
• To create a sense of excitement and engagement in the change agenda  
• Create a sense of involvement with the local businesses | • A total of 8 high profile events held across Bromley town centre over the period May 2012 to December 2013 |
| **Business Support** | Business support for small high street firms | Town centre wide | • Assist local independent businesses to remove barriers to growth and plan/ implement strategies for growth  
• Provide specific advice to businesses to help them prepare for events  
• Encourage joint marketing under the ‘Are you Bromley?’ campaign. | • Business support scheme targeted at town centre businesses providing free seminars, one-to-one sessions with businesses and support for joint marketing initiatives. Around 80 businesses supported. |
Bromley North Village: Before the Improvement Scheme

Below: East Street prior to enhancements

Below: Market Square prior to enhancements

Below: High Street (north) prior to enhancements

Below: East Street prior to enhancements
Bromley North Village Improvement Scheme Impact Review

Bromley North Village: After the Improvement Scheme

Below: Public Realm Enhancements on East Street

Below: Signage and Wayfinding Enhancements in Bromley North

Below: Shopfront Improvements in Bromley North Village

Below: Public Realm Enhancements elsewhere in Bromley town centre
Delivery and Early Review of Scheme Success

2.9 Delivery of the Bromley OLF scheme commenced in 2012 and completed in early 2015. Soon after the completion of delivery, an initial evaluation was undertaken to assess the performance of the project in delivery terms, and to review early evidence on success of the project.

2.10 While it was too early to assess the impact of the project, early indications suggested that the interventions had been well received by town centre businesses and users, with both these groups of beneficiaries reporting that the projects have enhanced the overall quality and image of the town centre.

2.11 There were also positive signs in terms of overall town centre performance, with a strong Christmas 2014 trading period and evidence of positive trends in terms of new investment into the town centre. Particularly positive trends were reported in Bromley North Village, with increasing footfall levels and reduced vacancy rates in that part of the town centre.

2.12 More generally, the project demonstrated strong strategic added value through delivery, including partnership working with a range of partners, demonstration of leadership though the delivery of ‘best practise’ interventions, success in levering in additional funding to support delivery, and evidence of influence in terms of refocusing local and sub-regional priorities towards responding to the challenges faced by the town centre.

2.13 The evaluation identified a number of key achievements of the project:

- Building on existing momentum and additionality: the project helped to extend planned investments by TfL and bring forward a number of other public realm improvements along the high street which would not have happened otherwise
- Ambition and quality of delivery: a number of the interventions delivered were described as exemplary across the London wide OLF programme, most notably the shop front improvement scheme.
- Diversifying the town centre: consultees highlighted the public realm enhancements had helped to create a ‘European’ style and aspirational ‘café culture’ in the Bromley North Village part of the town centre.
- Changing perceptions and increasing confidence: there was early evidence that the investments were generating increased levels of confidence in the area among investors
- Increased profile of Bromley town centre within the council: the perceived success of the scheme had led to the allocation of new resource to enable the delivery of further public realm enhancements and the progression of planning for a Business Improvement District
- Partnership working: strong new links were forged between key town centre partners including the Intu Centre, the Cathedral Group, St Mark’s Church and the Churchill Theatre.

2.14 The evaluation concluded that in helping to generate a step change in the way the town centre is perceived by users, businesses and wider stakeholders alike, the project had provided a strong platform on which to build with future interventions.

Summary of Project Outputs Delivered

| Area of Public Realm Improved | 4,000 sqm |
| Junctions Improved            | 10 |
| New Pocket Parks              | 1 |
| Street Trees Planted          | 18 |
| New Way Finding and Other Signs Installed | 17 |
| Shop Fronts Improved          | 28 |
| Events Delivered              | 8 |
| Businesses Supported          | 50 |
| Business Workshops Delivered  | 5 |

Source: Bromley Council
3. **Review of Bromley North Village Performance and Scheme Impact**

3.1 This chapter provides an update on the impact of the Bromley North Village Improvement Scheme building on a review of town centre performance metrics and new consultation with local businesses and visitors to the area.

**Bromley North Village Characteristics and Performance**

3.2 As noted previously, Bromley North Village is broadly defined as the northern part of Bromley town centre encompassing Market Square and, branching of from here, High Street (north), East Street and Widmore Road.

**Bromley North Village: Overarching Characteristics**

3.3 Overall there are over 200 retail units in the Bromley North Village area providing in excess of 43,000m² of commercial floorspace across a range of uses.

3.4 Commercial activity is largely confined to the ground floors with a strong presence of leisure and service activity which makes up 66% of all business activity in Bromley North Village. Food and Drink premises alone make up 28% of Bromley North Village’s business activity – the largest proportion of any sector followed by Hairdressing, Health & Beauty (20%). Independent traders make up 35% of all business activity in Bromley North Village, 5% above the London average and 1% below the national average.

**Recent Performance**

3.5 In headline terms, there is evidence of recent improvements in the vitality of Bromley North Village, demonstrated by increasing footfall levels and new investment into the area. That said, the local vacancy rate has shown fluctuation, and has recently increased to close to the wider town centre average.

Evidence of increasing footfall...

3.6 The 2015 post-delivery evaluation reported early evidence of increasing footfall levels in the Bromley North Village area. Latest evidence further backs up this trend.
3.7 The Bromley North Village footfall camera registered over 2.5 million pedestrians in Q3 2016. The first three quarters of 2016 have seen footfall consistently higher than in 2015, with over half a million more visitors in total over that period.

3.8 Longer term footfall counts undertaken by Bromley Council also suggest that footfall has increased by 18% in the area since 2011.

Fluctuations in local vacancy levels...

3.9 The Bromley North Village vacancy rate currently stands at 8.8% - slightly below the average for Bromley town centre as a whole (9.0%), but slightly above the average for London (8.5%). Within the North Village, there are currently around 16 units vacant: 5 on east Street and 11 on High Street (north)

3.10 Vacancy rates in the area have fluctuated in recent years, from a high of nearly 12% in July 2011, to lows of 4.0% and 5.8% in May 2012 and May 2015 respectively. While there has been a rise in vacancy over the past year, based on footfall evidence and feedback from the surveys, it is thought likely that this reflects normal high street churn rather than any serious deteriation in performance.

Some high-profile investment into the area...

3.11 In the period since the completion of the Bromley North Village Improvement Scheme, the area has benefited from a number of new and high profile business investments which have strengthened and diversified the quality of the town centre offer.

3.12 A total of 11 businesses have been identified in Bromley North Village which have opened over the past two years. These are diverse in nature and include a jewellers, an estate agent and numerous multiple and independent food and drink businesses, such as Franco Manca, Gourmet Burger Kitchen, Benitos Hat, Barre and Horn and the refurbished Railway Tavern.
Employment Change...

3.13 The above investment into the town centre has supported the creation of new jobs: it is estimated\(^1\) that 92 full time equivalent jobs are supported within the eleven businesses that have opened in Bromley North Village over the past 2 years.

3.14 While in net terms the level of additional employment growth will have been offset to some extent by displacement effects and instances where other units have become vacant, wider employment intelligence confirms the recent growth in the food and drink sector in Bromley town centre. ONS data\(^2\) suggests that while the town centre experienced small contractions in a number of its employment sectors between 2012 and 2015 (including retail, public administration, professional services), over the same time period employment in food and drink activities across the town centre as a whole increased by around 15% (around 100 jobs) – a higher growth rate than seen across the Borough as a whole (+4%) and London (+12%).

**Perspectives of Businesses and Town Centre Users**

3.15 When businesses and town centre users were surveyed in the post-completion evaluation in 2015, there were early indications that the interventions had been well received, with both groups of beneficiaries reporting that the projects have enhanced the overall quality and image of the town centre.

3.16 This section provides an update on the perspectives of town centre users and businesses on the enhancements delivered and on the overall vitality of the Bromley North Village area. The section is based on analysis of two new bespoke surveys undertaken for this work:

- Business survey – just under 50 businesses were surveyed over a period of two days in October 2016. The survey covered businesses across the North Village area. All businesses in the area were spoken to and given the opportunity to engage; the eventual response rate of 25% represents a strong sample

- Town centre user survey – just under 50 town centre users were surveyed over the same time period in October 2016. The approach to sampling was random, with passers-by targeted at a number of higher footfall locations across the Bromley North Village area.

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\(^1\) Based on data taken from the Regeneris Business Survey

\(^2\) Employment estimates provided by the ONS Business Register and Employment Survey
The Perspective of Town Centre Users

At the headline level, town centre visitors were generally positive about the enhancements delivered and were well satisfied with the overall town centre environment.

Positive perceptions on the improvements overall ...

3.17 Headline visitor perspectives on the improvements were broadly positive. Over 60% of those surveyed agreed that the enhancements had improved their perception of the area, over 80% agreed that the enhancements had made the area more attractive, and 70% agreed that they had improved their overall satisfaction with the area.

3.18 Just over half of those surveyed agreed that the enhancements had strengthened the leisure / cultural offer of the Bromley North area – perhaps reflecting the recent investment by new food and drink operators into the area.

Some evidence of positive impact on town centre usage behaviours...

Whilst most visitors did not think that the enhancements had changed the way they use Bromley North Village, a small proportion of visitors reported positive impacts. Around a quarter of visitors reported that they were visiting the town centre (as a whole) more often, a fifth said they were coming to Bromley North Village more often, and 15% stated that they were spending more money when they visited Bromley North Village.
Impact of bus stop relocation largely negligible...

3.19 In overarching terms, the relocation of the bus stops as part of the Bromley North Village Improvement Scheme appears to have had limited impact: 77% of visitors stated that there has been no impact on how they use the area, 60% stated that there has been no impact on overall experience of the area, and 62% stated that there has been no impact on their overall satisfaction with the area.

3.20 Of those who reported an impact, perceptions were skewed towards the positive:
- Around 36% reported that the relocation has improved their satisfaction with the area (2% reported an adverse impact)
- Around 19% reported that the relocation has had a positive impact on how much they use the area, with 5% reporting negative impacts
- Around 23% reported a positive impact on overall visitor experience of the area, although in this instance negative sentiment was higher at 16%.

3.21 Users who noted a positive impact from the relocation of the bus stops suggested that the relocation had created more space for pedestrians and reduced congestion on the pavement at market square, reduced bus congestion and improved safety next to the ATM that previously abutted the bus stop.

3.22 Conversely, users that were unsatisfied with the bus stop repositioning cited a longer walk into the town for elderly passengers, with some users calling for the stop to be relocated back to its old Market Square location.

Strong overall satisfaction levels with Bromley North Village...

Overall visitor satisfaction with Bromley North Village was strong, with over 80% of visitors reporting that they were satisfied or very satisfied with the area. Of all users surveyed only one respondent registered dissatisfaction with the area.
3.23 Despite this, a number of suggestions were made to improve the area:

- While comments suggested there was satisfaction around the improved public realm and built environment of Bromley North Village, there was some suggestions that this needs to be better maintained as the new pavement is becoming tired looking through staining, chewing gum and litter.

- Aside from this there were broader comments around concerns of safety in the North Village area, focused around the dropped curbs creating confusion as to whether the area is fully pedestrianised. Several users believed that this could be improved by clearer signage and demarcation between the road and pavement.

- Several town centre users (referring to the whole town centre) suggested an appetite to bring a higher end department store to Bromley to broaden the current retail offer and offer a replacement to the now vacant BHS.

The Perspectives of Businesses

3.24 Generally speaking, business perspectives were more mixed than those of town centre users. While there was overarching satisfaction with the impact of the interventions on the town centre environment, limited impact on business performance was reported, and concerns were raised regarding a number of factors constraining business in the area.

Long Standing Businesses

3.25 Headline business perspectives on the improvements were broadly positive. Almost three quarters of the business surveyed agreed that the improvements had made Bromley North Village a more attractive environment, 69% agreed that the interventions had improved overall town centre vitality, and 59% agreed that the works had improved overall perceptions of Bromley North Village. This was reflected by broader comments made by businesses that the concentration of restaurants in the area had given Bromley North Village an identity and created more of a destination in the context of the town centre.

3.26 Conversely, business perceptions were skewed towards the negative in terms of impact on parking and loading arrangements and impact in terms of helping to reduce crime. Several businesses reported that whilst crime on the whole has decreased during day time hours, the increased evening economy has led to some adverse evening behaviour impacts in the night time. Furthermore, this increased vibrancy in the evenings has tended to reduce the attractiveness of the shopping area in the morning due to heightened levels of litter.

3.27 Perceptions were equally divided between positive and negative regarding the impact of the relocated bus stops.
Limited uplift in business performance...

3.28 Overall business performance over the last two years has been mixed:
- In terms of footfall, businesses were split almost evenly in terms of reporting increases, decreases and no change
- Around 42% of businesses reported an increase in turnover over the last 2 years, with a third reporting a decrease and 25% reporting they had experienced no change
- A stronger trend was reported in terms of employment: while around 59% of businesses reported no change, 35% reported a decrease and only 6% reported an increase.

3.29 Businesses were asked to what extent their business performance over the past 2 years had been influenced by the OLF interventions and again perspectives were mixed:
- Just over a half of businesses thought that there had been no impact on footfall. Of the remaining businesses, around a half reported a positive impact, and half reported a negative impact
- Just over two thirds reported no impact on turnover, and three quarters reported no impact on employment. Again, for businesses reporting an impact, responses were divided between positive and negative impacts.
Figure 3.10 Overall business performance over the past 2 years

Figure 3.11 Q. Did the OLF Interventions have any direct impact on performance?

Source: Regeneris Business Survey. Sample: 37

Source: Regeneris Business Survey Sample: 32

3.30 Comments by businesses suggested that the degree of impact of the interventions was particularly influenced by the location and positioning of the business in the town centre. This was particularly the case in relation to the repositioning of the bus stops in Bromley North Village, which had both positive and negative impacts upon certain businesses depending on location and type of business. Several businesses felt aggrieved as the removal of the bus stop away from their premises had reduced footfall, whilst other businesses benefitted from this relocation through an increase in footfall. Conversely, there was a number of businesses who believed that the repositioning of the bus stops adjacent to their store increased littering and antisocial behaviour directly outside their premises as well as creating a visual barrier to their shopfronts.

3.31 Outside the impact of the OLF interventions businesses cited several reasons for these changes, broadly relating to changes in the market, individual business actions and the general health of Bromley North Village and Bromley town centre. These Included:

<table>
<thead>
<tr>
<th>Positives</th>
<th>Negatives</th>
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<tbody>
<tr>
<td>Competitor stores closing</td>
<td>Difficulties for customer parking</td>
</tr>
<tr>
<td>Footfall increasing</td>
<td>Rise of online shopping</td>
</tr>
<tr>
<td>Concerted marketing and advertisement campaigns</td>
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Evidence of positive impact in terms of attracting new investment...

3.32 The survey findings suggest that the interventions have directly encouraged new businesses to locate in Bromley North Village. Of the businesses that have opened in Bromley North Village since the delivery of the OLF enhancements, around half indicated that the improvements played a role in their decision to invest in the area.

3.33 Businesses cited moving to Bromley North Village to benefit from the flow of footfall in the area and the improved environment/attractiveness of the area. Some new businesses commented on the appeal of locating in Bromley North Village being several well respected independent shops already trading in the area.
Overall good satisfaction levels but some commonly identified concerns...

3.34 Overall satisfaction with Bromley North Village as a place to do business is skewed towards the positive, with nearly two thirds of those questioned either satisfied or very satisfied. Despite this, just over a quarter of businesses stated that they were dissatisfied or very dissatisfied.

3.35 Wider comments by a number of businesses provided more detail to substantiate these figures:

- Improved attractiveness and cleanliness was the most cited reason for business satisfaction within Bromley North Village.

- There was mixed opinion amongst businesses regarding Bromley North Village’s concentration of restaurant provision. Several businesses believed that this gave them a unique identity and created a destination in the context of Bromley Town Centre, whilst others believed that this undermined the diversity of businesses in the area and detracted from the retail offer.

- The most consistent negative comment that hindered satisfaction with Bromley North Village was around parking. Several businesses noted a variety of issues in this regard; including parking enforcement being too punitive, parking being expensive particularly in comparison to outer town shopping centres such as Bluewater who offer free parking, as well as issues with loading goods into their facilities being an arduous task due to a lack of loading bay provision.

3.36 Businesses suggested a number of ways in which the town centre could be improved as a place to do business:

- Several businesses along High Street North cited the closure of the path adjacent to The Hill car park as an improvement that could drive footfall outside shopfronts. Businesses here noted a marked increase in footfall and revenue during the period that OLF construction was underway and the path was closed, with one business citing a 25% increase in profit during this period.

- Businesses mentioned improvements to parking that could be delivered in several areas. This centred around offering free short stay parking, clearer signage and more accessible loading bays.

- Maintaining the attractiveness of the area through increased bin provision, street cleaning, replacing dead trees along East Street and establishing more greenery in the area to further encourage the outdoor eating and drinking culture.
4. Conclusions and Legacy

Project Performance and Impact

4.1 The objective of the Bromley North Village Improvement Scheme was to enhance the vibrancy and vitality of Bromley North Village (and the wider town centre) by improving the quality and appearance of the town centre environment, diversifying the retail and leisure offer to accommodate a better mix of day and evening activities, improving connections to and through the area, and preserving and improving the heritage character of the area.

4.2 The initial evaluation of the scheme undertaken immediately after the completion of delivery in 2015 suggested that the interventions had been well received by town centre businesses and users, and identified some positive early signs in terms of overall town centre performance.

4.3 Research undertaken to inform this update report to a large extent perpetuates these early findings. At the headline level, there is evidence of further improvement to the vitality of Bromley North Village, and there is overall satisfaction from businesses and visitors with the enhancements delivered. Key successes in this respect include:

- **Improving footfall to and through the area** – evidence suggests that there has been a strong increase in footfall in Bromley North Village since 2011. Most recently this has equated to an additional half a million people passing through the area in the first three quarters of 2016 compared to the same period in 2015.

- **Diversifying town centre uses** – a key objective of the scheme was to support a more diverse offer in Bromley North Village. The evidence points to success in this regard: over a third of businesses in the area are independent, and the area is home to a large and growing cluster of food and drink businesses. A number of recent investments into the area by high profile food and drink businesses has strengthened the local offer considerably, and ONS evidence confirms recent growth in food and drink employment across the town centre. A strong proportion of new businesses in the area directly linked their investment decision to the recent improvement scheme.

- **Improving the appearance and perceptions of the area** – the 2015 evaluation found that the improvements delivered in Bromley North Village had been ‘transformational’ in terms of their impact on the quality of the environment across Bromley North Village. There was strong agreement from both businesses and town centre users that the improvements have improved the quality and appearance of the environment and perceptions towards it. Overall visitor satisfaction rates with the area are high at 80%.

4.4 That said, the research has also suggested that the improvements to town centre performance are not yet fully ‘embedded’ and cannot be taken for granted, and a number of concerns have been raised by businesses regarding trading conditions in the area:

- **Fluctuating vacancy** – despite the improvements in footfall, vacancy rates in Bromley North Village have fluctuated, and most recently has increased to a level which is similar to the town centre and London average. While this is likely to reflect typical churn rather than serious deteriation in performance, it demonstrates that ongoing work is needed to ensure the continued vitality of the North Village area.

- **Mixed impact on business performance** – despite the evidence of increased footfall through the area, the business survey work do not provide conclusive evidence that this is translating into improved business performance. While some businesses reported...
improving performance in recent years, other reported decreases in footfall and employment. While in many respects this is likely to reflect tough trading conditions for high street businesses generally, a number of businesses linked these adverse impacts directly back to the Improvement Scheme, and in particular the relocation of the bus stops

- **Lower levels of business satisfaction** – business satisfaction levels are comparatively low when compared to visitor satisfaction levels. While two thirds of businesses are satisfied with the area, around a quarter of businesses are dissatisfied. Many of these concerns appear to relate to parking and loading challenges, and wider trading conditions and are not linked directly to the improvement scheme. That said, it is important that these concerns are understood and where possible responded to, to ensure further enhancement to the vitality of Bromley North Village as a business location.

4.5 A largely mixed response has been provided to the relocation of the bus stops as part of the Improvement Scheme. A small number of businesses have been vocal in recording concerns that the bus stop relocations had resulted in adverse impacts for their businesses, relating to changes in footfall flows through the town centre. That said, these concerns are not representative of all businesses (more businesses were positive about the bus stop relocations than negative). While the majority of town centre users reported that the relocation has had no impact on how they use or experience the town centre, a small number reported a positive impact.

**Project Legacy and Next Steps**

4.6 In many respects, the legacy of the Bromley North Village Improvement Scheme should be measured in terms of its impact on town centre performance. While there is early evidence that the project has resulted in some early successes (most notably in terms of footfall and new investment), legacy will ultimately need to be measured over the long term, in terms of sustained improvement to the vitality and vibrancy of that part of the town centre.

4.7 Survey work has highlighted a number of potential areas of focus for the council and its partners in working to deliver a strong legacy:

- Ensuring that the quality and appearance of Bromley North Village continues to be maintained, both in terms of day to day street cleaning and maintenance but also wider streetscene enhancements (eg working with the BID to encourage and provide advice to businesses to invest in shop front upgrades)

- Exploring options to increase footfall flows down High Street (north) from the Hill Street car park

- Continuing to work with businesses and partners such as the BID to explore options to respond to trader concerns regarding parking.

4.8 Aside from direct impact on town centre performance, it should be noted that the wider project has also delivered a more strategic legacy:

- Bromley town centre public realm improvement – the successful delivery of the Bromley North Village scheme has encouraged Bromley Council to invest further in the area, extending the public realm improvements further south from Market Square, down High Street

- Bromley Business Improvement District (BID) – the delivery of the project also played a catalytic role in the establishment of the Bromley BID in 2015. The BID provides representation for the local business community and plays an active role in town centre management and marketing. The BID has an important role to play in supporting Bromley
businesses (including those in the North Village) and ensuring that a strong legacy of the project is realised and maintained.