BROMLEY RETAIL & LEISURE STUDY 2024 — EXECUTIVE SUMMARY

FIRSTPLAN WITH URBA

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EXECUTIVE SUMMARY

Introduction

1 Firstplan have been instructed by the London Borough of Bromley ('LBB' / 'the Council') to provide advice on future retail and town centre needs of the Borough, including a quantitative assessment of floorspace need, and guidance on the current performance of its network of town centres. The study will form a critical part of the evidence base of the Council's new Local Plan, which will guide development in the Borough over the period to 2041. The study has been prepared in conjunction with the property consultants Urbá, who have provided commercial market advice and context as part of the primary evidence of the study and inputted into the development of the study's strategic recommendations.

2 The full report is referred to as the Bromley Retail & Leisure Study 2024; this report provides an Executive Summary of its key findings. The study acts as a full new evidence base study in respect of retail and town centres and is supported by new empirical evidence. The Council's last study was completed in 2012.

3 The study seeks to identify the current challenges facing town centres, and the opportunities which can deliver healthy, diverse and vibrant centres over the course of the new Local Plan period. It also identifies where residents in the Borough are currently undertaking their shopping and commercial leisure visits, and provides a quantitative and qualitative assessment of the future retail and commercial leisure needs which the Borough will need to plan for. The study aims to support the Council's strategic planning functions, and in particular to provide evidence for the Council's review of the current Local Plan that was adopted in 2019, as well as provide strategic advice on the future role and function of Bromley's town centres.

4 Our study has been informed by a mixture of on-site and desk-based information gathering, including site visits to Borough's network of town centres including Bromley metropolitan town centre and Orpington major centre, district centres (Beckenham, Penge, Petts Wood, West Wickham and Crystal Palace), and local centres (Biggin Hill, Chislehurst, Hayes, Locksbottom and Mottingham). We have also carried out a desktop assessment of Borough's 67 neighbourhood centres.

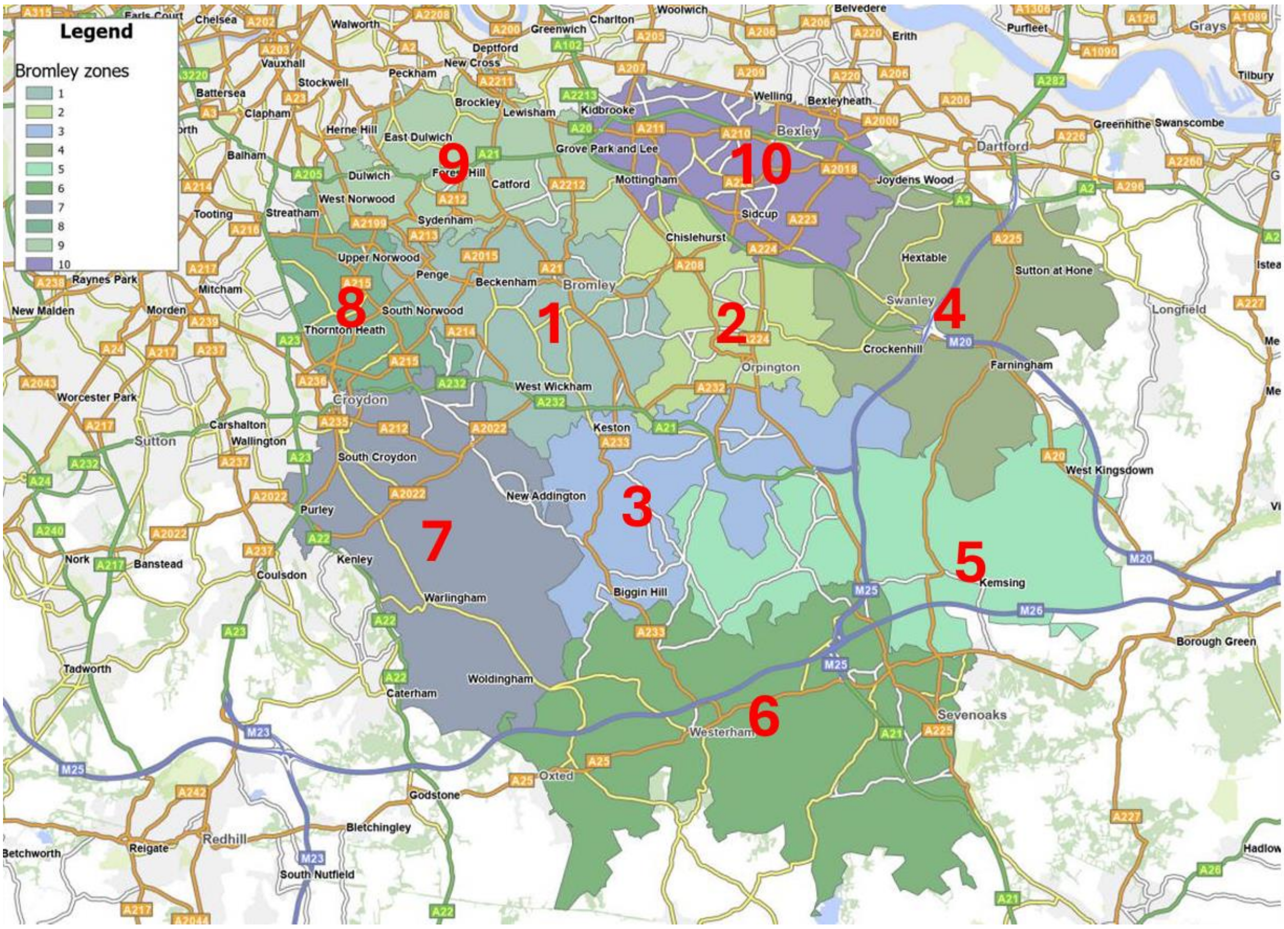
5 Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across the Borough, as well as adjacent surrounding areas where residents may look towards facilities in the Borough to meet their shopping and leisure needs. Firstplan have also engaged with a range of stakeholders as part of this study, including cross-departmental consultation with other relevant departments within the Council, discussions with neighbouring local planning authorities and other key stakeholders such as leaders of Business Improvement Districts.

The Household Telephone Survey

6 In order to accurately capture the impact of the key changes in the retail and commercial leisure sectors (discussed further below) and gain a clear understanding of where residents of LBB and its surrounding catchment are visiting for their shopping and leisure trips; a new household telephone survey has been undertaken in support of the study. The survey captures patterns of shopping for comparison goods, convenience (food) goods, different types of commercial leisure activity (such as dining out, visiting cinemas, entertainment venues and so on), as well as identifying how residents use the town and district centres in the Borough. The new survey also captures the proportion of local residents spend which is spent online. The survey was developed in collaboration with the Council and undertaken by a specialist market research consultancy, NEMS Market Research. The household survey is a critical component in informing both our qualitative understanding of how the Borough's network of town centres are performing, as well as the quantitative 'need' for new retail floorspace over the Council's new Plan period which this study seeks to identify.

7 The overall survey area, as shown in **Figure 1**, has been divided into ten different survey zones, in order to enable local patterns of shopping to be accurately captured across different parts of the survey area. LBB falls predominantly within zones 1, 2 and 3, with zone 1 covering the more urban north-western side of the Borough, zone 2 covering the eastern side of the Borough (Orpington and Petts Wood) and zone 3 covering the more rural southern side of the Borough. Approximately one hundred telephone surveys were undertaken in each of the ten zones (1,000 in total).

Figure 1 Household Telephone Survey Area



Map source: Experian with Firstplan annotations

Planning and Legislative Context for preparation of the Study

8 The study has had full regard to the relevant national and development plan context in its preparation, including the National Planning Policy Framework (NPPF) and adopted Bromley Local Plan (2019), together with the Supplementary Planning Documents which the Council has published for Bromley and Orpington town centres. We have also had regard to the findings of the LBB Evening and Night Time Economy Study, which was prepared by consultants concurrently alongside this study.

9 The study has also regard to major changes in planning legislation which have come forward in recent years, most significantly the amendments to the Use Classes Order which came into effect in September 2020. The most significant element of this been the introduction of three new use classes, class E, class F1 and class F2, which collectively have been designed to allow for a greater range of flexibility in the range of uses which can be accommodated in town centres without requiring planning permission.

10 The introduction of use class E can be considered highly significant not only for town centres but for all retail locations. It means that a commercial unit which was, for example, formerly in class A1 retail use, can now change to a cafe or restaurant use (formerly class A3) without requiring planning permission for change of use, unless a specific restrictive condition applies. This provides town centres and other retail locations with the opportunity to respond more flexibly to changes in demand from different types of uses/operators. However, the introduction of class E applies to all locations - i.e. it is not just applicable to town centres. This means there is scope for retail parks and other non-town centre locations to benefit from the additional flexibility afforded by class E.

11 Also of significance is an amendment which was made to Permitted Development Rights which allows for the change of use from Class E properties to residential from August 2021, known as 'Class MA'. However, LBB have made and confirmed 46 non-immediate Article 4 Directions to remove these Permitted Development Rights, in a number of strategic locations in the Borough including its Town Centres, Business Improvement Areas, Office Clusters and Strategic Industrial Locations, as well as the majority of Locally Significant Industrial Sites and a number of neighbourhood centres.

Retail and Commercial Leisure Market Context

12 The study sets out an appreciation of the wider retail and commercial leisure market context within which our study has been prepared, with specialist input from the property consultancy Urbá. This provides a snapshot of the market at the time of preparation of the study (early 2024), although it is advised that the retail and leisure market historically has been — and continues to be — fast moving and highly susceptible to wider economic circumstances and trends. The key wider market factors which are influencing town centres include the continued growth of e-commerce / online shopping; the cost of living crisis; the growth of the convenience sector; and reduced demand for physical representation by many national comparison goods retailers. The above considerations, aligned with the changes to the Use Classes Order (as described above), open the door to town centres becoming more mixed use, reducing reliance on retail and introducing a broader range of leisure, community, cultural and residential uses.

13 Key amongst the above considerations is the growth of online shopping. UK internet sales as a percentage of total retail sales has gradually increased since 2006, but the global pandemic significantly increased this growth. The data providers Experian identify that the UK average proportion of spending for comparison goods (non-food goods) shopping is 24.3% at 2024; however the household survey undertaken in support of this study identified however that the Borough and surrounding ‘survey area’ has significantly higher levels of online shopping for comparison goods, with an average of 52.5% in 2024. Therefore, over £1 in every £2 on comparison goods in the Bromley area is currently being spent online; this in turn can be expected to reduce the ‘need’ for additional physical retail floorspace in the Borough. Online spending on convenience (food) goods in the Bromley area is also noticeably higher than the UK average, accounting for 20.0% of available spending in the Bromley area compared to 5.2% as a UK average.

14 In terms of the convenience goods sector, the most significant trend since the Council’s last retail study has been the continued rise in popularity of the discount retail sector, headed by Aldi and Lidl. The success of these stores has increased significantly over the course of the last decade, with their popularity initially having been boosted during the 2008 financial crisis, but has become particularly amplified in recent years as both companies step up store expansion programmes and claim greater levels of ‘market share’ at a time when much of the population is becoming increasingly cost-conscious and switching to the use of these stores for at least an element of their shopping. Aldi has recently overtaken Morrisons to be the UK’s fourth largest supermarket in terms of market share, a significant moment given it has broken the long-standing ‘big four’ dominance of Tesco, Asda, Sainsbury’s and Morrisons. We would expect both Aldi and Lidl to be seeking additional foodstore representation in the Borough in the short to medium term.

15 In terms of the comparison goods sector, even prior to the global pandemic, the shift from “bricks to clicks” was being significantly felt in the comparison sector. Well-known names were being lost such as Austin Reed, BHS, Staples and Maplin. The global pandemic only sought to accelerate the decline and saw further changes within the comparison goods sector that included the shopping centre Intu and retailers such as House of Fraser, Debenhams, Arcadia Group (the owner of Topshop, Topman, Burton, Dorothy Perkins, Miss Selfridge, Wallis and Evans) and the budget homeware retail chain Wilko all entering administration in recent years; many of these had physical store representation in centres in the Borough (e.g. Debenhams, Wilko and Topshop in Bromley; and Wilko also in Orpington and Penge).

16 Other retailers are also continuing to re-shape their store estate: for example many branches of Argos are relocating inside large Sainsbury’s stores, and Marks & Spencer stated in 2022 that they would close 67 lower productivity stores by 2028, as part of a reprofiling of their store estate that will see investment in larger city centre stores, more stores on retail parks / out of centre sites, and continued growth of the food side of operation. Positively, a number of comparison goods retailers are continuing to expand their physical store estate, including Primark, Inditex (owners of Zara), Uniqlo and Frasers Group.

17 The commercial leisure sector has also faced cost pressures including the increase in the national living wage, energy bills, business rates and ingredients. In addition, the industry has faced staff shortages following Brexit and the Covid-19 pandemic. Nevertheless, the sector has recorded areas of growth, with ‘competitive socialising’, encompassing a mix of experiential leisure activities, including urban mini golf; darts; axe-throwing; ping-pong; breakout rooms; bowling; and virtual reality showing strong levels of growth over the past five years.

18 Elsewhere, Savills report that consumer spending on the Food & Beverage (F&B) and leisure market is currently (2024) polarising, with people seeking value that doesn’t necessarily mean “cheap eats”. The fast food sector is flourishing and driving growth in the sector with a rise of franchising and new entrants (particularly from the US) with the likes of Wingstop, Chick-fil-A, Raising Cane’s and Wingers all looking for sites. ‘Urban brands’ such as Rosa Thai, Dishoom, Comptoir Libonais and Mowgli are also all currently expanding. The coffee sector is also performing strongly for the most part, and relatively new market entrants such as Gail’s, Black Sheep Coffee and Blank Street are all expanding rapidly. Savills also identify that customers are responding positively to local and small chains that deliver on authenticity, sustainability and community. Local successes in this respect include Blackbird Bakery which has recently opened in Penge and Beckenham.

Findings of Town Centre Health Checks

19 The report sets out a comprehensive assessment of the performance of the network of centres in LBB against the ‘town centre health check’ indicators set out at paragraph 006 of the ‘Town Centres & Retail’ Planning Practice Guidance (‘PPG’) (as amended, 2020). These indicators are, collectively, designed to provide an understanding of the ‘vitality and viability’ of the Borough’s centres, covering matters such as the diversity of uses within a centre, retailer representation, vacancy rates, pedestrian flows, accessibility, perception of safety and occurrence of crime, state of town centre environmental quality, and customers’ experience and behaviour. In respect of the latter indicator, our assessment was informed by questions on residents’ views and usage of town centres in the Borough which were asked in the household telephone survey.

20 For each centre, our health check analysis identifies a summary of the strengths and weaknesses of each of the Borough’s town, district and local centres, as set out below. Our overall conclusions were that the Borough’s network of centres are generally displaying positive levels of ‘vitality and viability’, and whilst most centres have elements of their overall ‘health’ which could be strengthened and improved, none of the shortcomings we have identified can be considered critical to their overall levels of vitality. However, in order for the centres to perform at an optimum level moving forward, consideration should be given to targeting the areas of weaknesses which have been identified.

Bromley Metropolitan Town Centre

Strengths	Weaknesses
• Continues to have strong comparison goods offer which continues to be main footfall driver in centre • Presence of a large number of national retailers remaining at a time when many are curtailing their physical presence • Good and clear pedestrian circuit through centre • Excellent accessibility • Environmental quality is good in most of centre, some strong heritage assets • Supermarkets bookend either end of centre • Street market adds diversity and is footfall generator • Key leisure assets for the Borough within centre e.g. Churchill Theatre, Pavilion • Relocation of LBB offices to Bromley South will retain footfall and spend in centre	• High (but decreasing) vacancy rate • Appears to be limited market demand for larger footprint units – Debenhams and Wilko remain empty • Offer feels very chain-dominated, with independent offer pushed to periphery and possibly overlooked • Leisure offer feels somewhat secondary, limited “café culture” • Closure of Picturehouse will impact cultural offer • Poor integration of St Mark’s Square • Centre is elongated, arguably too big, for different types of offer in the centre to effectively “mesh”

Orpington Major Town Centre

Strengths	Weaknesses
• Meets day to day service needs well • Strong anchor store in Tesco Extra which helps pull footfall through centre • Odeon is a good leisure anchor • Walnuts Leisure Centre and Library both important attractors • Evidence of recent investment in centre • Southern half of centre has generally positive environmental quality	• Offer appears to have moved downmarket • Competing with strong offer at Nugent / other retail warehousing to north of centre • High number of charity shops indicates lack of demand • Walnuts Shopping Centre has poor offer and negatively impacts wider centre • Northern part of centre has low demand and poor environmental quality • Public realm could be improved in parts of centre.

Beckenham District Centre

Strengths	Weaknesses
• High quality foodstore anchors • Strong evening economy / café culture • Attractive setting • Well connected • Green spaces within and close to centre	• Proliferation of charity shops along central stretch of High Street • Some congestion issues particularly at periphery • Loss of Lidl has reduced breadth of convenience offer

• Evidence of recent investment, e.g. Travelodge site	• Investment in some heritage assets e.g. Odeon required

Crystal Palace District Centre (including parts of district centre within neighbouring LPA areas)

Strengths	Weaknesses
• Meets a range of day to day shopping needs • Diverse and 'boutique' retail mix - specialist retail offer has potential for inflow of spending from wider than a local catchment • Strong food & beverage sector • Independent cinema • Historic and unique feel • Proximity to Crystal Palace Park • Library of Things • Well connected	• Traffic congestion during daytime hours • On-street parking is limited and adds to congestion • Relatively high vacancy rate and some prominent vacant sites • Needs smartening up in parts • Public realm needs reviewing to ensure pedestrian movement through centre is not impacted • Linkages with Park need improving – will become more important as Park host more events

Penge District Centre

Strengths	Weaknesses
• Meets a range of day to day shopping needs • Sainsbury's (with Argos) a strong anchor store • Generally positive environmental quality • Independent sector emerging at western end of centre	• High vacancy rate • Recreational / open space assets not well linked to centre • food & drink offer is over-reliant on fast food / take-aways although there is a good independent sector.

Petts Wood District Centre

Strengths	Weaknesses
• Meets a range of day to day shopping needs • Morrisons a strong anchor to western side of centre • Strong café, dining, pub offer • Eastern side has strong environmental quality and noticeably strong retail offer • Station's location centrally within centre ensures good levels of footfall • Wide pavements present opportunities for food & beverage sector	• Disparity in quality of offer and overall town centre environment between western and eastern sides of centre • Railway lines segregate the centre and west-east connections across the railway are poor • Approach to railway station from west is particularly uninviting • Morrisons is a dated building which negatively impacts on environmental quality on western side of centre • Western side of centre has somewhat austere feel to public realm • Long term vacant units (former Barclays / HSBC banks) on eastern side of centre.

West Wickham District Centre

Strengths	Weaknesses
• Strong foodstore anchors, located throughout centre • Good supporting comparison goods mix, including specialisms in home goods sector • Centre has retained two banks, although long term future of these cannot be certain. • Library redevelopment will add footfall and linked trips and offers potential to enhance dwell time • Environmental quality of centre largely positive • Good levels of satisfaction amongst users of centre.	• Duplication in convenience offer (2x Sainsbury's), both stores appear dated compared to M&S and Lidl. • Charity shops along prime pitch may suggest softening demand from retail and leisure operators.

Biggin Hill Local Centre

Strengths	Weaknesses
• Strong anchor store in Waitrose • Good supporting retail offer including range of day to day services • Well maintained, wide pavements	• Public transport accessibility more limited due to rural nature • Some investment in pavements/ streetscene would be beneficial.

Chislehurst Local Centre

Strengths	Weaknesses
• Environmental quality • Sainsbury's is a strong anchor • Strength of offer means likely to have a catchment wider than a typical local centre • Less reliant on retail to support overall vitality	• High end shopping and leisure offer comes at expense of some day to day shopping facilities

Hayes Local Centre

Strengths	Weaknesses
• Meets a range of local / day to day shopping • Good anchor stores • Station contributes to overall vitality and footfall	• No significant weaknesses identified.

Locksbottom Local Centre

Strengths	Weaknesses
• Strong foodstore presence, likely to support linked trips • Good leisure offer for size of centre • North side of Crofton Road has good architectural interest / sense of place	• Possibly feels over-provided for in terms of car parking and may be some scope for rationalisation. Overall feels quite car-dominated. • Petrol station centrally located undermines architectural quality • No pharmacy – key gap in offer • Most of centre errs towards functional in terms of environmental quality

Mottingham Local Centre

Strengths	Weaknesses
• opening of Lidl provides the centre with a strong anchor and potential for other stores to capture linked trips • M&S within BP provides further top up shopping but less likely to cater to local residents • reasonable range of day to day needs • low vacancy • good environmental quality in northern part of centre	• location of the Lidl at northern end of the centre may have pulled 'centre of gravity' northwards • southern part of centre (LB Greenwich) appears more functional

Neighbourhood centres assessment

21 A further component of this study was to provide an analysis of the network of 69 neighbourhood centres and parades across the Borough; these are set out in Appendix 10 of the adopted Local Plan. The role and function of these centres is to meet essential day to day needs of a localised catchment, the majority of whom would be expected to walk to the centre. Given the small size of the neighbourhood centres (which in some cases comprise just one unit), the assessment was undertaken on a desktop basis.

22 The key objective of the neighbourhood centres analysis is to identify the ability which each of the centres has to respond to local residents' essential day to day shopping and service's needs. A total of 14 key facilities were applied into an scoring matrix, to establish the extent of representation of the following 'key facilities' in each centre, including the presence of a supermarket; small convenience store; newsagent/off licence; other convenience outlets (e.g. bakery, greengrocer, international foods); post office; pharmacy; ATM; laundrette/ dry cleaners; public house; café; take-away; hairdressers/beauty salon; GP surgery and dentist.

23 Each neighbourhood centre above five units was assigned to a category, informed by the number of facilities present within the centre itself, and also the proximity to other centres which may offer different / a larger range of services. This analysis identified:

- The Borough as a whole is well provided for in terms of local-scale neighbourhood shopping facilities, and most residents have access to either a good range of facilities at the local level, or a more limited range of facilities at a local scale with a greater range a short distance away in a higher-order centre i.e. a town, district or local centre. There are areas on the eastern side of the Borough (broadly speaking, between Orpington and Bexley, around St Mary Cray / St Paul's Cray) where residents' access to local facilities is less strong relative to the rest of the Borough. Accordingly, the Council should seek to enhance provision in these areas when appropriate opportunities exist.

- There are two neighbourhood centres at High Street, Green Street Green and Burnt Ash Lane, Sundridge Park which could be considered to be 'overperforming' in terms of their role and function. As both centres are anchored by large-format foodstores, and therefore have a wider shopping catchment than other neighbourhood centres in the Borough, there may be scope for these centres to be reconsidered in the centre hierarchy.

Comparison goods shopping patterns and identification of need

24 The second core component of the study is to identify the current shopping patterns for comparison and convenience goods for residents in the study area, and identify the level of 'need' for new floorspace in the Borough for the Council's new Local Plan period. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping.

25 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area.

Shopping patterns

26 In terms of comparison goods shopping patterns, the household telephone survey results allow us to see the proportion of total available spend which is retained within the survey area (known as its 'retention rate'), and the proportion which is spend in locations further afield (often referred to as 'leakage'). This indicator is a good reflection of both the strength of the retail offer of town centres and other retail destinations in a survey area, and also can be expected to take into account other factors such as accessibility and quality of experience for users of the centres. Overall, the survey results have identified that 55.0% of all available comparison goods spending is retained within the survey area, including 29.8% which is retained by centres and stores within LBB. The remaining 45.0% is spent at centres/stores outside the survey area, including Croydon, Bluewater and Central London. It is the LBB retention rate of 29.8% which is used to inform the outputs of our quantitative needs assessment for comparison goods.

27 The main locations for comparison goods shopping for residents in the survey area are shown in **Table 1.**

Table 1 Main locations for comparison goods shopping in survey area (destinations in LBB shown highlighted)

Rank	Centre / retail destination	Comparison goods spend from survey area, 2024 (£m)	% of total comparison goods spend available to survey area	Within survey area?
1	Bromley town centre	285.4	14.4%	Yes
2	Purley Way retail warehousing	190.2	9.6%	No
3	Bluewater	145.1	7.3%	No
4	Charlton / Greenwich retail warehousing	121.1	6.1%	No
5	Orpington retail warehousing	113.2	5.7	Yes
6	Croydon town centre	91.8	4.6%	No
7	Bell Green retail warehousing	90.7	4.6%	Yes
8	Central London (Oxford Street / West End)	80.4	4.1%	No
9	Lewisham town centre	67.8	3.4%	Yes
10	Crayford & Dartford	58.3	2.9%	No

Source: Table CM5a, Appendix 1 (Volume 1) of main report

28 Table 1 shows that Bromley town centre is the most popular destination for comparison goods shopping in the survey area, although the overall proportion of spend it captures from the survey area is, at 14.4%, relatively low, and points to the fact that residents of the survey area benefit from a wide number of comparison goods shopping opportunities both within and outside the survey area. Bromley town centre is the only defined town centre in LBB to fall within the top ten most popular destinations; Orpington as a second-tier 'major' town centre attracts £46.7m of comparison goods spend (equivalent to 2.4% of total available comparison goods spending), which places it as the 12th-most popular comparison goods shopping destination overall.

29 The second-most popular destination for comparison goods spending for the survey area is Purley Way in Croydon, which draws £190.2m of comparison goods spend. Purley Way is an established corridor of out-of-town retail warehousing, with one of the main draws being an IKEA store, but as our analysis has previously identified, there have been some enhancements of the retail offer in this area in recent years, including the opening of a full-line M&S store. The retail warehousing exerts a significantly greater pull on spending than Croydon town centre, despite the latter being a more accessible destination. Similarly, retail warehousing in the Charlton / Greenwich area, again anchored by the presence of an IKEA store, as well as large branches of M&S, Sainsbury's (including a substantial non-food offer), and a number of other retail parks, is also a popular shopping destination, drawing £121.1m of spend from the survey area.

30 Bluewater continues to remain a significant comparison goods shopping destination, drawing £121.1m of spend from the survey area, equivalent to 7.3% of total available comparison goods spending.

31 A further key significant takeaway from Table 1 is the strong performance of retail warehousing in Orpington, which collectively accounts for £113.2m of comparison goods spend – almost 2.5 times that of nearby Orpington

town centre[1]. This confirms the findings of our health check analysis that Orpington can be considered to be underperforming as a comparison goods shopping destination at the current time, and the relatively strong out of town offer (headed by Nugent Retail Park) is a more compelling proposition for many residents in the survey area.

Identification of comparison goods capacity

32 Having undertaken the assessment of shopping patterns and trading performance, we set out the quantum of comparison goods floorspace which the Council should seek to plan for over the period to 2041, summarised in **Table 2**. We have assumed that any new comparison goods floorspace would trade broadly in line with that of existing, with some allowances for improvements on account of modern floorspace generally being more ‘efficient’ in terms of turnover per sq.m. On this basis we have assumed that new comparison goods floorspace would trade at a base of £5,000 per sq.m at 2024, with these sales densities themselves improving in efficiency over the course of the Plan period. We consider these to represent appropriate sales densities to use having regard to the current trading performance of comparison goods floorspace in the Borough.

33 Capacity forecasts become increasingly open to margins of error over time and should be refreshed over the Plan period, and on this basis forecasts beyond 2034 should be considered indicative. The forecasts are based on a ‘constant market share’ approach, assuming that current patterns of comparison goods shopping (as identified by the household telephone survey) will remain unchanged over the course of the Plan period to 2041. We are, at the time of preparation of this study, not aware of any major development proposals within or surrounding the survey area which would indicate that these shopping patterns will materially change, although clearly that may change in the future.

Table 2 Estimated comparison goods floorspace need for LBB, 2024-41

Interval year	2029	2034	2041*
Estimated comparison goods floorspace requirement (sq.m net, rounded)	-1,500	-2,000	-200

*Source: Table CM8a, Appendix 1 of main report *forecasts for 2041 should be considered indicative. Please note that all figures are cumulative (e.g. the comparison goods ‘need’ decreases by an additional 500 sq.m net between 2029 and 2034).*

34 Table 2 shows that, at the Borough-wide level, there is no requirement to plan for additional comparison goods floorspace, and the negative numbers in fact identify a marginal ‘over provision’ of floorspace, which reduces over the course of the Plan period to 2041. However, the lack of comparison goods capacity should not mean that the council imposes a moratorium on new comparison goods floorspace in the Borough, particularly in instances where proposals are of an appropriate scale and have potential to enhance the vitality and viability of the network of centres. Applications should be considered on their merits and, where appropriate, compliance with the sequential and retail impact policy tests.

Convenience goods shopping patterns and identification of need

35 The approach to the calculation of convenience goods need largely reflects that used to calculate comparison goods need, as set out above. The quantitative need relates to larger-format foodstore convenience goods retail floorspace in LBB.

[1] The umbrella term ‘Orpington Retail Warehousing’ refers to the collection of retail warehousing along Cray Avenue in Orpington, e.g. Nugent Shopping Park, Springvale Retail Park, and standalone retail warehouse units.

Shopping patterns

36 Convenience goods shopping is a more localised activity – a type of shopping where residents are more likely to use the facilities close to their home, rather than actively seek to travel a longer distance to visit a particular store. Consequently, it means that catchments typically retain a greater proportion of convenience goods market share than for comparison goods. Unlike for comparison goods shopping, there is relatively little merit in looking at aggregate shopping patterns across the survey as a whole, given the more localised nature of convenience goods shopping. Therefore, we focus our analysis on the shopping patterns of the individual survey zones, and within this, the survey zones which falls wholly or partly within LBB (zones 1, 2, 3, 8 and 9). The most popular convenience goods shopping destinations by zone is shown below in **Table 3.**

Table 3 Most popular convenience goods shopping destinations by zone (LBB zones only)

Zone number	Zone name	Most popular convenience goods shopping destination (2024) (%)	2nd-Most popular convenience goods shopping destination (2024) (%)	3rd-Most popular convenience goods shopping destination (2024) (%)
1	Bromley MTC & Beckenham	Tesco, Bromley (10.5%)	Lidl, Sundridge Park (6.5%)	Sainsbury's, Bromley town centre (4.9%)
2	Orpington	Tesco Extra, Orpington (17.8%)	Sainsbury's, Chislehurst (11.5%)	Sainsbury's, Locksbottom (11.3%)
3	Biggin Hill	Tesco Extra, Orpington (15.2%)	Sainsbury's, Locksbottom (14.6%)	Waitrose, Biggin Hill (13.2%)
8*	Croydon North	Tesco, Thornton Heath (8.3%)	Sainsbury's, Crystal Palace (6.1%)	Tesco, Elmers End (5.5%)
9*	Lewisham	Sainsbury's, Lee Green (6.2%)	Sainsbury's, Bell Green (6.1%)	Lidl, Peckham (4.4%)

Source: household survey results

37 In the more urban areas of the Borough – zones 1, 8 and 9 – patterns of convenience goods shopping are extremely scattered with no one store or series of stores commanding a significant market share from residents. In zone 1, only one store attracts a market share of over 10% (the Tesco store on Homesdale Road, east of Bromley town centre); in zones 8 and 9 no store attracts a market share over 10%. This is broadly reflective of the urban grain of these zones and the fact that residents have access to a wide range of convenience goods shopping options. Indeed for zone 1, the household survey identifies that 17% of all convenience goods shopping is undertaken in local convenience stores, many of which are located across the Borough's network of neighbourhood centres.

Identification of need

38 Given the more localised nature of convenience goods shopping, it is important to pay particular attention to the quantitative need arising at a sub-area level. To this end, the convenience goods need forecasts are presented for three sub-areas[2]; the 'urban north' of the Borough which covers Bromley, Beckenham, Penge, West Wickham and Crystal Palace areas; Orpington and Petts Wood; and the rural south of the Borough. A summary of the quantitative need for additional larger-format foodstore floorspace at the sub-area level, sourced from the above tables, is shown in **Table 4.**

Table 4 Larger format foodstore convenience goods need by sub-area

Interval year	Household survey zone	2029	2034	2041*
Estimated convenience goods floorspace requirement (sq.m net, rounded) – larger format foodstores – urban north	1, 8 (part), 9 (part)	600	700	1,100
Estimated convenience goods floorspace requirement (sq.m net, rounded) – larger format foodstores – Orpington / Petts Wood	2	200	200	500
Estimated convenience goods floorspace requirement (sq.m net, rounded) – larger format foodstores – rural south	3	-500	-500	-400

*Source: Table CV8a, Appendix 2 of main report *forecasts for 2041 should be considered indicative. Please note that figures are cumulative (e.g. there is a requirement of an additional 200 sq.m net floorspace between 2029 and 2034).*

39 Table 4 shows that there is a positive need for additional convenience goods floorspace in both the urban north area, and the Orpington / Petts Wood area, taking into account existing commitments for new convenience goods floorspace:

- there is no quantitative need for the Council to plan for any additional convenience goods floorspace in the rural south part of the Borough;
- Broadly speaking, we consider the need for 700 sq.m net of additional floorspace at 2034 for the urban north of the Borough (zone 1, plus the parts of zones 8 and 9 in LBB) to be the equivalent to the provision of one small to medium additional foodstore to meet the larger-format food shopping needs of residents in this area over the period to 20342 In the main report, comparison goods need is also identified at the sub-area level for completeness.
- The figure of 200 sq.m net for zone 2 (the Orpington / Petts Wood area) equates to a relatively low need (the size of a small convenience store); we consider the need in this area is likely to have been largely captured by the extant consent for a new Aldi store at Locksbottom.

[2] In the main report, comparison goods need is also identified at the sub-area level for completeness.

Commercial leisure assessment

40 Commercial leisure uses are making an increasingly important contribution to the vitality and viability of town centres at all levels in the retail hierarchy. As demonstrated in the 'health check' assessments included in this study, commercial leisure uses, in particular 'evening economy' uses such as bars, clubs, music venues and cinemas, make an active contribution to the overall vitality and viability of the some of the Borough's larger centres.

41 We have identified the patterns of commercial leisure visits which residents in the survey area are currently undertaking, based on the findings of the household telephone survey undertaken in support of this study. The findings of the household telephone survey confirm the following patterns of commercial leisure activity for residents in the survey area:

- 68% of residents in the survey area visit restaurants;
- 59% of residents in the survey area visit cafes;
- 49% of residents in the survey area visit cinemas;
- 46% of residents in the survey area visit pubs/bars;
- 40% of residents in the survey area visit arts & cultural venues;
- 29% of residents in the survey area visit health & fitness clubs; and
- 26% of residents in the survey area visit entertainment venues.

Identification of leisure catchments

42 The main report undertakes analysis of the commercial leisure catchment of each of the Borough's town and district centres, which identifies that:

- **Bromley town centre's** primary leisure catchment extends across the widest area in respect of its cinema provision, where the town centre attracts a market share of over 30% from zones 1, 2 and 3, plus a secondary market share from zone 7 and a tertiary market share from each of the remaining survey area zones except zone 5. The town centre also performs well in terms of having a reasonably wide catchment for entertainment uses, although it does not draw a market share of over 30% from any zone in respect of this activity.
- Bromley town centre's primary catchment for restaurants and cafes does not extend beyond its local zone, zone 1, and in respect of both sectors its catchment drops off quite significantly beyond zone 1. This suggests that Bromley is not viewed as a 'destination' for these type of leisure activities by residents in the survey area. As a metropolitan town centre, it would be expected that higher order catchments would be seen across adjacent zones, including zones 2, 3 and 9.
- The use of leisure facilities within **Orpington town centre** are particularly concentrated within zones 2 and 3 which is reflective of the centre's small retail catchment which predominantly comprises local residents rather than consumers who travel significant distances. Notwithstanding this, the Odeon Cinema located adjacent to the Walnuts Shopping Centre does draw some residents from further afield, including zones 4 (7.3%) and 5 (26.8%), and draws good market shares from zones 2 and 3 where it faces competition from the Vue which is easily accessible on the southern edge of Bromley town centre.
- Given that Orpington is classified as a major town centre, trips to both restaurants and pubs/bars are possibly lower than expected, particularly within zone 2 which is its local zone, although the centre does not have an extensive offer in either of these sectors. Chislehurst local centre is strongly represented in terms of trips to restaurants and pubs/bars within zone 2, and it is likely the case that the smaller centre is

drawing trade away from Orpington due its more upmarket offer. There is also considered scope for Orpington to grow market share in the health and fitness sector.

- **Beckenham district centre** does not achieve a primary catchment for any of the leisure uses included in this study. It was identified that Beckenham has a particularly strong food and beverage offer, including the provision of several nationally operated restaurant chains, however this does not translate into a significant market share; likely as a consequence of other centres within and close to zone 1 also competing for market share in this respect.
- The representation of **Crystal Palace district centre** in terms of visits to cafes, pubs/bars and restaurants are particularly concentrated within its local zone (zone 8) and zone 9 which is found adjacent to the north of the centre. The market shares attracted to the centre for these uses can, in the context of its role and function as a district centre, be considered to be relatively strong. Our health check assessments have identified that the breadth of the independent café and restaurant offer is one of the key strengths contributing to the overall vitality of the district centre.
- Crystal Palace also benefits – unusually for a district centre – a cinema, operated by Everyman, which helps diversify the leisure offer and makes an important contribution to the evening and night time economy. The cinema achieves a secondary catchment across zones 8 and 9 and offers a more 'premium' offer with a higher associated price point. The centre does not attract significant market shares in the remaining sectors due to a lack of facilities of this nature within the centre.
- **Penge district centre** does not account for a significant market share for the various leisure types in both its local zone (zone 1) and well as the wider survey area. Our health check assessments have identified the range of leisure uses in the centre to be limited, with the food and beverage offer predominantly restricted to fast food and take-away uses. Notwithstanding the competition from nearby centres which perform well across a number of commercial leisure sectors, it is considered there is a clear opportunity for Penge to grow market share from its local catchment in terms of restaurants, cafes and pubs/bars.
- **Petts Wood district centre** achieves a secondary catchment for restaurants, cafes and pubs/bars in its local zone (zone 2). As a district town centre, this concentrated representation can be expected, as the centre predominantly serves the needs of local residents rather consumers that are located nearer to other town centres within the borough. The market shares can be considered reasonable, and may increase in the future as we have identified the food & beverage offer in the centre to have benefited from a number of recent openings, and there may be momentum for further growth of these uses.
- **West Wickham district centre** does not account for a significant proportion of the market share within its local zone (zone 1), however does draw trade from zone 7 for which is found adjacent to zone 1 to the south. In terms of zone 7, West Wickham achieves a secondary catchment for restaurants and cafés in addition to a tertiary catchment for pub/bars. Likewise, the district town centre also achieves a tertiary catchment for trips to cafés for respondents from zone 3. We would expect the market shares for restaurant and café sectors from the local zone (zone 1) to be higher, indicating the centre could be better provided for in this respect.
- **Chislehurst local centre** attains a secondary catchment for restaurants, cafes and pubs/bars in its local zone (zone 2). Given its status as a local centre, it is considered that Chislehurst is performing exceptionally strongly in respect of the market shares for these types of leisure activities, particularly within the restaurant sector which falls just below primary catchment categorisation. The centre also draws trade for the aforementioned leisure uses from respondents within zone 10, and some more limited market share from zones 1 and 9.

Commercial leisure expenditure projections

43 By applying the Experian population projections we have adopted for the retail capacity forecasts to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure

spending available to residents of the survey area. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it provides an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above. The results of this exercise are summarised in **Table 5** for the periods 2024-34 and 2023-41. As with the retail capacity forecasts, we advise that figures beyond 2034 are considered as indicative.

Table 5 Expenditure growth in key commercial leisure categories

Sector	Expenditure growth in survey area, 2024-34 (£m)	Expenditure growth in survey area, 2024-41 (£m, indicative)
Cultural services	+73.8	+131.9
Recreation & sporting services	+57.6	+102.9
Restaurants and cafes	+340.2	+607.9
Total	+471.7	+842.8

Source: Table L4d, Appendix 3 (Volume 1) of main report. Figures for 2041 are indicative. Please note, figures are cumulative

44 Overall, Table 5 shows that spending growth in the commercial leisure sector is expected to increase by £471.7m in the survey area between 2024 and 2034, and indicatively by £842.8m between 2024 and 2041. 72% of this spending growth will be in the restaurants and cafes sector, suggesting there is considerable expenditure capacity to support additional facilities of this nature across the Borough and indeed as retail demand decreases, aligned with introduction of class E, it may be reasonable to expect further strong demand for this type of floorspace moving forwards, building on what appears to be considerable recent growth in this sector in many of the Borough's centres. It is emphasised that long term forecasts should be considered indicative. Growth in the other key commercial leisure sectors is more limited but still substantial, and points to the need that additional facilities in these categories can be supported in the survey area, where market demand exists.

Conclusions & overarching recommendations

45 The following overarching headlines and conclusions can be identified from our analysis, and it is considered that these recommendations should form the broad approach to the strategic direction for retail, commercial leisure and main town centre uses development in the Council's new Local Plan. In the main report, these overarching conclusions are taken forward into a number of Borough-wide and centre-specific recommendations which provide a greater level of detail.

46 The study's recommendations can be couched in the following overarching strategic conclusions:

- **The network of town centres in the Borough are largely performing strongly, with no significant concerns over the 'vitality and viability' of any of the centres. That said, for most centres, there are clear areas where improvements can come forward to enable the network of centres to fulfil their optimum potential.**
- **The role and function of town centres is evolving, and the Borough's network of town centres will need to have a balanced mix of uses in order to be successful. Recent national and legislative updates provide the market with flexibility to do this, but it needs to be informed by strategic policy where necessary.**

- A balanced mix of uses, offering interest and activity at different times of the day, will not only help increase footfall and patronage to a town centre, but also mean that people may spend longer in the centre, or visit more frequently. The ultimate aim for the Borough's network of centres should be to meet the day to day and higher-order shopping needs of residents in a sustainable manner.
- It is also important not to overlook the fact that retail does still drive footfall in the Borough's town centres, and also acts as a catalyst for linked trips with other In Bromley town centre for example, over one-third of respondents stated that non-food shopping was the main reason for visiting the centre. However, it is likely that this proportion has decreased as the role of online shopping has increased.
- There will be a need for continued investment in Bromley's network of town, district, local and neighbourhood centres throughout the new Plan period to ensure they continue to remain vital and viable locations. This could include investment in public realm, paving, landscaping / planting and general placemaking to help provide centres with a sense of place and enable local residents to want to visit and spend time in their centres.
- Investment should be secured through appropriate mechanisms such as legal agreements associated with new development, where relevant and justifiable. We have identified a number of more place-specific interventions where additional investment may be required. However, it is acknowledged that interventions will be dependent on funding being available and future council decisions, and recommendations set out in this section should not be seen as firm commitment that these will take place.
- With the exception of addressing a need for additional larger-format foodstore provision in the urban north of the Borough there is not considered to be a quantitative case for significant additional retail floorspace in the Borough over the period to 2041, and at a strategic level the focus should be on working with existing floorspace to ensure it is able to meet modern occupiers needs. However, floorspace needs should be kept under regular review as economic and market circumstances can fluctuate.
- It should also be remembered that need forecasts are not a 'ceiling' for development and planning applications for retail and other main town centre uses should be considered on individual merits and, where necessary, demonstrate compliance retail policy (sequential and retail impact) tests.
- Our analysis has forecast significant growth in the commercial leisure sector over the new Plan period. Whilst it is not possible to directly translate this into floorspace requirements, we expect there to be a need to plan for additional provision of this nature. Accordingly, proposals which seek to deliver additional floorspace of this nature should be supported in principle provided amenity, retail policy and other relevant considerations are met.
- The Council should consider a strategy for each of its town centres in its new Local Plan. Town centre strategies need to be considered holistically, across LBB departments, and it is important that plan-making does not come forward in a silo. Strategies should have regard to initiatives across economic development, regeneration, open space, and arts & culture
- In terms of market demand, our commercial property assessment has identified limited demand for larger footprint units in the Borough; perhaps evidenced most clearly by the difficulty in securing re-lets to the vacant Debenhams and Wilko units in Bromley town centre. With the possible exception of a retailer such as John Lewis & Partners (who are not expanding their physical store portfolio), most big retailers who would have an appetite for larger format spaces are now represented in the Borough.
- The Borough has a comprehensive network of neighbourhood centres and local shopping parades which play a highly important role in meeting many residents' day to day shopping needs. There are parts of the Borough where additional small-scale convenience facilities would be beneficial to improve residents' access.

47 Recommendations are also provided on the proposed hierarchy of centres, and defined town centre boundaries and Primary Shopping Areas on a centre-by-centre basis. It is recommended that the Council consider the reclassification of two neighbourhood centres in Green Street and Sundridge Park as local centres, and a number of minor changes to town centre frontages across the network of centres. To bring the Council's approach to mapping its town centre boundaries and frontages in line with the current NPPF approach, and having regard to the flexibility promoted under class E, it is recommended the adopted Local Plan approach of defining primary and secondary shopping frontages is replaced by the definition of a 'primary shopping area' within each centre (with primary frontages also recommended to be retained in Bromley town centre, to protect its district-wide scale shopping offer).

REPORT ENDS. For and on behalf of Firstplan, May 2025