BROMLEY RETAIL & LEISURE STUDY 2024 (VOLUME 1 – MAIN REPORT)

FIRSTPLAN WITH URBÁ

23 MAY 2025

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DOCUMENT CONTROL

Project Title	Bromley Retail & Leisure Study 2024
Client Name	London Borough of Bromley
Site Address	—
Report Title	Volume 1 Main Report
Firstplan Ref	24018
Prepared by	AB – JH – AM (FIRSTPLAN) / SC (URBA)
Version	Final Report
Date	23 May 2025
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Please refer to separate document (Volume 3)

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SECTION 1 | INTRODUCTION & STRUCTURE OF REPORT

Introduction

1.1 **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.

1.2 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. As our report sets out, in the intervening period there have been fundamental changes to the sector. Town centres at all levels of the retail hierarchy, and all across the country, have had to adapt — and will continue to have to adapt — to these changes, in order to ensure they remain vital and viable destinations which are able to meet the needs of local residents in a sustainable manner.

1.3 The study fully articulates this wider context within which our findings have been prepared. For example, the Covid-19 pandemic brought about a significant upturn in online shopping (which was already increasing prior to the Covid-19 pandemic), but has also changed how people live and work, with potential opportunities for local high streets and town centres arising from increased levels of homeworking in some locations.

1.4 The upturn in online shopping in turn reduces the demand by many operators for physical floorspace, meaning that town centres have had to diversify in order to attract footfall and spend. Changes to national planning legislation, and in particular the introduction of the class E use class, since the last study, will also impact on the strategic planning of town centres moving forward. Recent years have also seen many town centres affected by national retail closures such as Arcadia Group (Topshop, Topman, Burton), Debenhams and Wilko, and the downsizing of other retailers such as House of Fraser and John Lewis. Further details of the policy and legislative context within which the study has been prepared is set out in **Section 2** of this report.

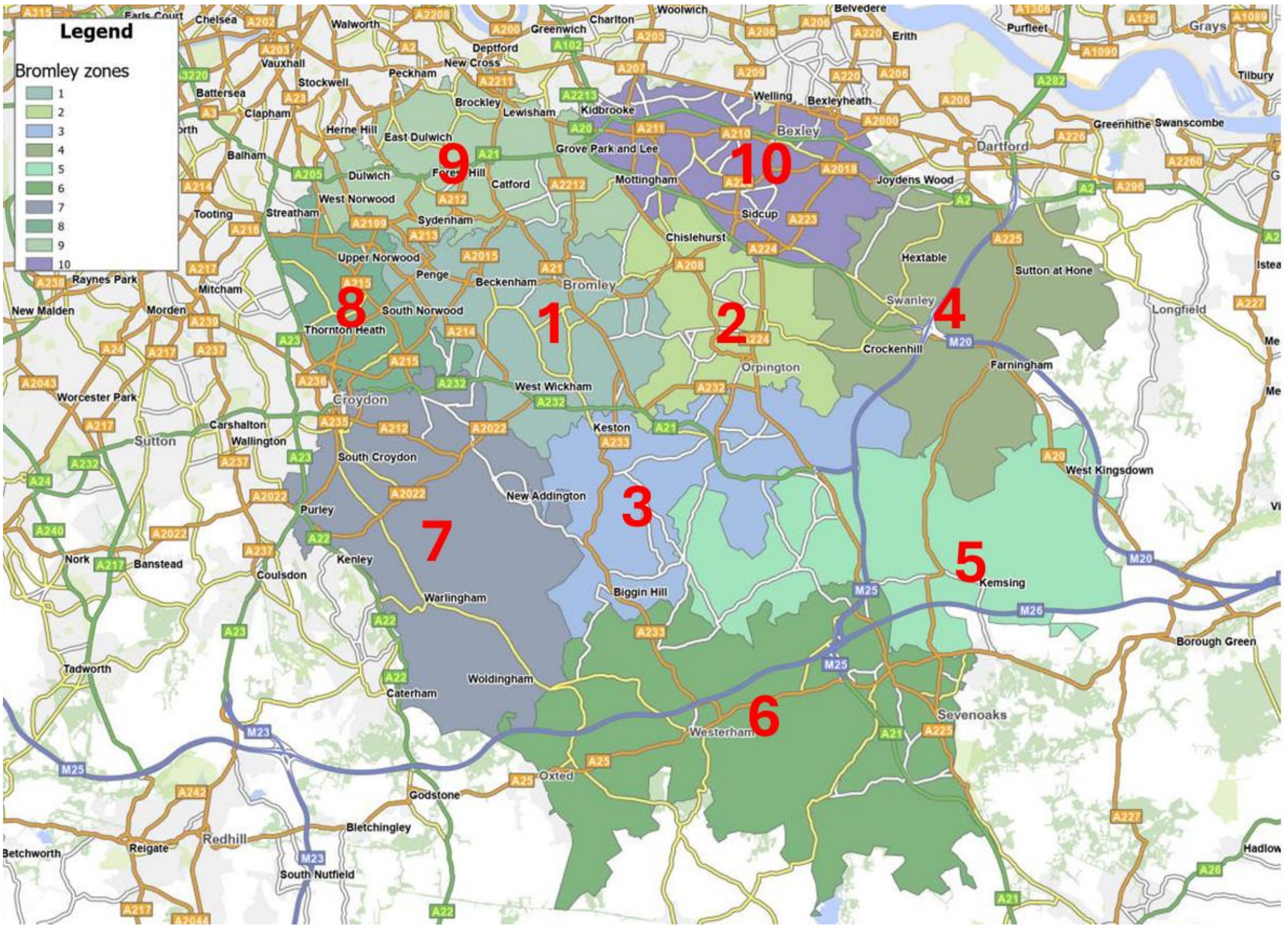
Household telephone survey

1.5 In order to accurately capture the impact of the above changes 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 amount 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.

1.6 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.

1.7 The overall survey area, as shown in **Figure 1.1,** 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 and zone 3 covering the more rural southern side of the Borough.

Figure 1.1 Household Telephone Survey Area



Map source: Experian with Firstplan annotations.

1.8 Approximately one hundred telephone surveys were undertaken in each of the ten zones (1,000 in total). Respondents were contacted across a variety of days at the week and at different times, and respondents' key demographics (e.g. age bracket and gender) were recorded in order to ensure a robust sample of the local population was captured. All respondents surveyed were asked to confirm they were the principal shopper in the household.

1.9 The new household telephone survey sought to identify the shopping patterns of residents in the survey, for convenience goods, questions were asked on patterns of visits for 'main' food shopping (i.e. weekly/ bulk food shopping trips),'top up' food shopping (basket/small but frequent purchases) and 'small shops' (visiting specialist local retailers). Regarding comparison goods shopping, questions were asked about shopping patterns about types of goods (i.e., electrical items, recreational goods, clothing and footwear). The telephone survey also identified pattern commercial leisure activity, asking respondents where they travel to attend cafes, restaurants, drinking establishments, amongst others. Whilst identifying patterns of shopping and usage of commercial leisure facilities, the new household telephone survey also incorporated qualitative questions about their usage of town centres in the Borough, their likes and dislikes in order to ascertain how town centres could potentially be improved.

Stakeholder engagement

1.10 As part of the study, we have undertaken discussions with a number of key local stakeholders, and we wish at the outset to provide our thanks to the stakeholders who gave up their time to inform our study and its recommendations. Those we spoke to as part of our work included:

- Other LBB departments including property, regeneration and economic development.
- Business Improvement Districts (BIDs) in Bromley, Orpington and Penge.
- Neighbouring local planning authorities, who have provided details on planned development in their own authority areas which may influence shopping and leisure patterns in the future.
- Consultants working on other overlapping studies currently being commissioned by LBB, e.g. a night-time economy study for the Borough's town centres.

Structure of report

1.11 The study can essentially be split into four parts, which together form **Volume 1** to this report.

1.12 **Part 1** sets out the context within which the study is being prepared, considering the local and national policy context. **Part 2** sets out the evidence of the current performance of the network of town centres in the Borough. **Part 3** considers the need for new retail and town centre uses floorspace, informed by the findings of the household survey, and **Part 4** draws together the findings of Parts 1-3 to provide a series of strategic conclusions and recommendations for the Council to take forward into future strategic planning documents. Our report is thus structured accordingly:

Part	Section number	Description
Part 1 — Study context	2	**Planning policy context** — sets out the national and local planning policy context within which this study has been prepared, as well as overview of current planning policy legislation in respect of class E, and an overview of the current development plan position of surrounding authorities.
	3	**Market context** — Sets out the market context within which this study has been prepared, focussing on key trends in the retail and town centres sector which have come about since the Council's last retail study in 2012, informed by commercial market input provided by Urbá.
	4	**Development in competing centres** — provides a summary of the recent and planned development in centres surrounding LBB, to establish whether there is any development which may influence patterns of shopping and leisure of LBB residents in the future.
Part 2 — Town centre performance	5	**Bromley town centre health check** — assessment of current performance of Bromley Metropolitan town centre.
	6	**Orpington town centre health check** — assessment of current performance of Orpington major town centre.

	7	District centres (urban northwest) health checks — assessment of the current performance of the district centres in the urban northwestern part of the Borough, namely Beckenham, Crystal Palace and Penge.
	8	District centres (central & east) health checks — assessment of the current performance of the remaining district centres in the Borough, Petts Wood and West Wickham.
	9	Local centres health checks — health checks of the network of local centres in the Borough.
	10	Neighbourhood centres key services assessment — audit of key facilities in each of the Borough's neighbourhood centres and local shopping parades.
Part 3 — Identification of needs	11	**Approach to household survey** — sets out the background to the household telephone survey, the survey area and zones, and methodological approach.
	12	**Comparison goods shopping patterns & identification of need —** Identifies the quantitative need for additional comparison (non-food) goods floorspace which the Council will need to plan for over its new Local Plan period.
	13	**Convenience shopping patterns & identification of need —** Identifies the quantitative need for additional convenience (food) goods floorspace which the Council will need to plan for over its new Local Plan period.
	14	**Commercial leisure needs assessment** — Sets out analysis of current provision of leisure and other main town centre uses in the Borough and analysis of potential future needs.
Part 4 — Strategy & recommendations	15	**Strategic recommendations —** Draws together findings of preceding chapters to create a series of strategic recommendations to inform LBB development plan preparation.

1.13 The main report is supported by a series of appendices which together form **Volume 2** to this report. The appendices are as follows:

- **Appendix 1 -** comparison goods need tables.
- **Appendix 2 -** convenience goods need tables.
- **Appendix 3 -** leisure expenditure tables
- **Appendix 4 -** household survey area map
- **Appendix 5 -** household survey questions summary
- **Appendix 6 -** commercial assessment (Urba Consulting)
- **Appendix 7** - summary of consultation and engagement
- **Appendix 8 -** neighbourhood centres audit
- **Appendix 9 -** neighbourhood centres summary

- **Appendix 10 –** neighbourhood centres mapping of scoring.
- **Appendix 11** - town centre boundaries review
- **Appendix 12** – Article 4 maps for town, district and local centres
- **Appendix 13** – comparison and convenience goods need summary tables and leisure expenditure tables – scenario test.

1.14 Full household survey results are set out as **Volume 3** to the study.

About the authors

- **Firstplan** are an established and growing independent planning consultancy who work on a wide range of public and private sector projects across London and the country, including extensive experience in town centres, retail needs assessments and the provision of strategic planning advice.
- **Urbà** are a property consultancy regulated by the Royal Institution of Chartered Surveyors (RICS) that specialises in development feasibility, viability and delivery. Urbá have acted as sub-consultants to Firstplan on this study.
- **NEMS Market Research** was established in 1981 and is a dedicated full-service market research consultancy. They are highly experienced in both quantitative and qualitative methods, and analytical and interpretative skills. NEMS Market Research have acted as sub-consultants to Firstplan on this study.

SECTION 2 | PLANNING POLICY CONTEXT

2.1 In this section we summarise the key features of national and local planning policy guidance which provides the context and framework under which this study has been prepared.

National Policy Context

National Planning Policy Framework (NPPF) (2024)

2.2 The most up-to-date iteration of the National Planning Policy Framework (NPPF) was published in December 2024 and sets out the Government's planning policies for England and how these should be applied (paragraph 1). The NPPF must be taken into account in preparing the development plan and is a material consideration in planning decisions (paragraph 2). At the heart of the Framework is a presumption in favour of sustainable development (paragraph 10).

2.3 The NPPF is clear that Local Plans, including neighbourhood plans where relevant, are the starting point for the determination of any planning application (paragraph 12). Thus, in terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise (paragraph 48).

2.4 LPAs should ensure that the preparation and review of all policies is underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and consider relevant market signals. (paragraph 32). Local plans and spatial development strategies are examined by an independent planning inspector to assess whether they have been prepared in accordance with legal and procedural requirements, and whether they are sound. Plans are 'sound' if they are (paragraph 36):

a) ***'Positively prepared*** *– providing a strategy which, as a minimum, seeks to meet the area's objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;*

b) ***Justified*** *– an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence;*

c) ***Effective*** *– deliverable over the plan period, and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and*

d) ***Consistent with national policy*** *– enabling the delivery of sustainable development in accordance with the policies in this Framework and other statements of national planning policy, where relevant.'*

2.5 The NPPF further advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should (paragraph 90):

a) *'define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;*

b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

2.6 As set out in Section 7 of the NPFF, local planning authorities are required to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Paragraph 92 explains that main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered. The NPPF also requires that when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (the current threshold for LB Bromley is 2,500 sq.m).

Planning Policy Guidance (PPG) 'Town Centres & Retail' (2014 and updated)

2.7 In March 2014 the then Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). The document is a 'live' web-based resource that is updated as necessary, and indeed most of the guidance in respect of town centres and retail was subject to a comprehensive update in 2019.

2.8 Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base, how to monitor the vitality and viability of town centres, and how to assess the impact of proposals for main town centre uses which fall outside of town centres. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

2.9 The Town Centres & Retail PPG identifies that the following indicators, and their changes over time, may be relevant in assessing the health of town centres, and planning for their future. The range of indicators used for assessing town centre vitality and viability was broadened following an update to this section of the PPG in 2019 to include factors such as opening hours, and evidence of whether there are considered to be any identifiable barriers in place which may prevent the expansion of existing businesses/ opening of new ones.

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' experience and behaviour;

- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements;
- perception of safety and occurrence of crime;
- state of town centre environmental quality;
- balance between independent and multiple stores;
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
- opening hours/availability/extent to which there is an evening and night time economy offer.

National Legislative Context

Changes to the Use Classes Order

2.10 Since the Council's last retail study, a significant change in respect of the Use Classes Order has come into legalisation, via the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (which came into force on 1 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.

2.11 Use Class E covers, in broad terms, uses which were previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and 'indoor sport' from D2(e):

- E(a) Display or retail sale of goods, other than hot food
- E(b) Sale of food and drink for consumption (mostly) on the premises
- E(c) Provision of:
    - E(c)(i) Financial services,
    - E(c)(ii) Professional services (other than health or medical services), or
    - E(c)(iii) Other appropriate services in a commercial, business or service locality
- E(d) Indoor sport, recreation or fitness (not involving motorised vehicles or firearms or use as a swimming pool or skating rink,)
- E(e) Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
- E(f) Creche, day nursery or day centre (not including a residential use)
- E(g) Uses which can be carried out in a residential area without detriment to its amenity:
    - E(g)(i) Offices to carry out any operational or administrative functions,
    - E(g)(ii) Research and development of products or processes
    - E(g)(iii) Industrial processes

2.12 The new use class F is split into two parts covering uses previously defined in the revoked classes D1, 'outdoor sport', 'swimming pools' and 'skating rinks' from D2(e), as well as newly defined local community uses:

- F1 Learning and non-residential institutions – Use (not including residential use) defined in 7 parts:
    - F1(a) Provision of education

  - F1(b) Display of works of art (otherwise than for sale or hire)
  - F1(c) Museums
  - F1(d) Public libraries or public reading rooms
  - F1(e) Public halls or exhibition halls
  - F1(f) Public worship or religious instruction (or in connection with such use)
  - F1(g) Law courts

- F2 Local community – Use as defined in 4 parts:
  - F2(a) Shops (mostly) selling essential goods, including food, where the shop's premises do not exceed 280 square metres and there is no other such facility within 1000 metres
  - F2(b) Halls or meeting places for the principal use of the local community
  - F2(c) Areas or places for outdoor sport or recreation (not involving motorised vehicles or firearms)
  - F2(d) Indoor or outdoor swimming pools or skating rinks.

2.13 The above changes have also resulted in a number of additional uses being added to the schedule of what are considered 'sui generis' uses. Most notably, these include public houses, wine bars or drinking establishments (formerly use class A4), drinking establishments with expanded food provision (also formerly use class A4), hot food takeaways (formerly use class A5). Live music venues, cinemas, concert halls, bingo halls and dancehalls are also now all considered as sui generis uses.

2.14 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, it is important to note 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, although it is often (but not always) the case that non-town centre retailing is subject to more restrictive historic planning restrictions in terms of ranges of goods which can be lawfully traded.

Permitted Development Rights ('PDR') in town centres

2.15 Also of significance is an amendment which was made to the General Permitted Development (England) Order 2015 ('GPDO') in March 2021 which allows for the change of use from Class E properties to residential from August 2021, known as 'Class MA'. Class MA PDRs came into force on 1st August 2021, and, subject to Prior Approval, allow for the change of use of a building and any land within its curtilage from a use falling within Class E (Commercial, Business and Service) to residential (Use Class C3). Class MA replaces the previous commercial to residential PDRs including Class O (Office to Residential) and Class M (A1 shops and A2 financial and professional services to Residential), which have since expired. A number of exemptions and limitations were applied to the legislation, including requirements for a subject property or building to be vacant for three months prior to any application for prior approval, and a floorspace cap of 1,500sq.m GIA, above which Class MA was not applicable.

2.16 These significant provisions were seen to provide wide-ranging opportunities for under-used or vacant town centre and strategic sites following the introduction of class E. The PDR allows for a more streamlined process with greater planning certainty and was intended by Government to support economic recovery, rejuvenate and diversify high streets through better use of vacant premises, and to encourage sustainable use of brownfield sites.

2.17 On 14th February 2024, following a public consultation undertaken last year, the Government further loosened the requirements by scrapping the three-month vacancy requirement and the 'cap' of 1,500sq.m for any application for prior approval submitted on or after 5th March 2024. There is now no cap to the floorspace which can be converted under Class MA, and no requirement for the building to be vacant for three months prior to the application being submitted. The intention of removing these restrictions is to allow more under-used Class E buildings to be converted to residential use, in turn providing a boost to the supply of homes. The remainder of the Class MA prior approval requirements and tests will still apply, and the changes will not affect properties that are currently the subject of Article 4 Directions (see below), which prevent the use of buildings for Class MA or where restrictive planning conditions are in place.

Article 4 Directions

2.18 Article 4 Directions are a mechanism by which local authorities can remove or restrict one or more permitted development rights from a site or area, meaning planning permission is required. However, the NPPF resists their application, stating at paragraph 54 (NPPF 2024):

'The use of Article 4 directions to remove national permitted development rights should:

a) where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)

b) in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)

c) in all cases, be based on robust evidence, and apply to the smallest geographical area possible. Similarly, planning conditions should not be used to restrict national permitted development rights unless there is clear justification to do so. '

2.19 Following the above changes to the GPDO, LBB have made and confirmed 46 non-immediate Article 4 Directions to remove PD rights granted under Part 3, Class MA of the Town and Country Planning (General Permitted Development) (England) Order 2015 (as amended). These Article 4 Directions cover Bromley's 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.

2.20 The introduction of the 'Article 4s' across the town centre and other employment locations were the subject of intervention by the Secretary of State who has made directions for the modification of these Article 4 Directions (in respect of the extent of their geographical scope), nevertheless the majority of commercial frontage within the Borough's network of centres remains under Article 4 Direction following this review. The Modified Directions come into effect on 27th September 2023. A schedule of the extent of Article 4 coverage in respect of the Borough's network of town, district, local and neighbourhood centres is provided at Appendix 12 of Volume 2 of this report.

Regional Policy Context

The London Plan (2021)

2.21 The London Plan was published in March 2021 and sets out a spatial strategy that plans for London's growth and a basis upon which London Boroughs produce their Development Plan Documents.

2.22 **Policy SD6** 'Town centres and high streets' states that the vitality and viability of London's varied town centres should be promoted and enhanced by:

1. *'encouraging strong and inclusive hubs with a diverse range of uses that meet the needs of Londoners, including main town centre uses, night-time economy, civic, community, social and residential uses*

2. *identifying locations for mixed-use or housing-led intensification to optimise residential growth potential, securing a high-quality environment and complementing local character and heritage assets*

3. *delivering sustainable access to a competitive range of services and activities by walking, cycling and public transport*

4. *strengthening the role of town centres as a main focus for Londoners' sense of place and local identity in the capital*

5. *ensuring town centres are the primary locations for commercial activity beyond the CAZ and important contributors to the local as well as London-wide economy*

6. *supporting the role of town centres in building sustainable, healthy and walkable neighbourhoods with the Healthy Streets Approach embedded in their development and management*

B. *The adaptation of town centres should be supported in response to the challenges and opportunities presented changes in technology and consumer behaviour, including improved management of servicing and deliveries.*

C. *The potential for new housing within and on the edges of town centres should be realised through mixed-use or residential development that makes best use of land, capitalising on the availability of services within walking and cycling distance.*

D. *The particular suitability of town centres to accommodate a diverse range of housing should be considered and encouraged, including smaller households, Build to Rent, older people's housing and student accommodation.*

E. *The redevelopment, change of use and intensification of identified surplus office space to other uses including housing should be supported, taking into account the impact of office to residential permitted development rights.*

F. *The management of vibrant daytime, evening and night-time activities should be promoted to enhance town centre vitality and viability, having regard to the role of individual centres in the night-time economy supporting the development of cultural uses and activity.*

G. *Tourist infrastructure, in town centre locations, especially in outer London, should be enhanced and promoted.*

H. *The delivery of a barrier-free and inclusive town centre environment that meets the needs of all Londoners, including disabled and older Londoners and families with young children, should be provided.*

I. *The varied role of London's high streets should be supported and enhanced.*

J. *The provision of social infrastructure should be enhanced, particularly where it is necessary to support identified need from town centre Facilities should be located in places that maximise footfall to surrounding town centre uses.*

K. *Safety and security should be improved, and active street frontages should be secured in new development'.*

2.23 **Policy SD7** 'Town centres: development principles and Development Plan Documents' states that boroughs should take a town centres first approach, discouraging out-of-centre development of main town centre uses in accordance with Parts A1 - A3, with limited exceptions for existing viable office locations in outer London Boroughs should:

1. *'apply the sequential test to applications for main town centre uses, requiring them to be located in town centres. If no suitable town centre sites are available or expected to become available within a reasonable period, consideration should be given to sites on the edge-of-centres that are, or can be, well integrated with the existing centre. Out-of-centre sites should only be considered if it is demonstrated that no suitable sites are (or are expected to become) available within town centre or edge of centre locations. Applications that fail the sequential test should be refused.*

2. *require an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre development for retail, leisure and office uses that are not in accordance with the Development Plan. Applications that are likely to have a significant adverse impact should be refused.*

3. *realise the full potential of existing out-of-centre retail and leisure parks to deliver housing intensification through redevelopment and ensure such locations become more sustainable in transport terms, by securing improvements to public transport. This should not result in a net increase in retail or leisure floorspace in an out-of-centre location unless the proposal is in accordance with the Development Plan or can be justified through the sequential test and impact assessment requirements in Parts A(1) and A(2) above.*

B Boroughs should support the town centres first approach in their Development Plans by:

1) *assessing the need for main town centre uses, taking into account capacity and forecast future need*

2) *allocating sites to accommodate identified need within town centres, considering site suitability, availability and viability, with limited exceptions for existing viable office locations in outer London. If suitable and viable town centre sites are not available, boroughs should allocate appropriate edge-of-centre sites that are, or can be, well integrated with the existing centre via public transport.*

3) *reviewing town centre boundaries where necessary*

4) *setting out policies, boundaries and site allocations for future potential town centres to accommodate identified deficiencies in capacity*

C In Development Plans, borough should:

1) *define the detailed boundary of town centres in policy maps including the overall extent of the town centre along with specific policy-related designations light of demand/capacity assessments for town centre uses and housing*

2) *consider the protection of out-of-centre high streets as local parades or business areas and develop appropriate policies to support and enhance the role of these high streets, subject to local evidence, recognising the capacity of low-density commercial sites for housing intensification and mixed-use redevelopment*

3) *develop policies through strategic and local partnership approaches to meet the objectives for town centres to support the development and enhancement of each centre, having regard to the current and potential future role of the centre in the network*

4) *develop policies for edge-of-centre areas, revising the extent of shopping frontages where surplus to forecast demand and introducing greater flexibility*

5) *identify centres that have particular scope to accommodate new commercial development and higher density housing, having regard to the growth potential indicators for individual centres in Annex 1. Key criteria includes assessments of demand for retail, office and other commercial uses amongst others*

6) *identify sites suitable for higher density mixed-use residential intensification capitalising on the availability of services within walking and cycling distance and current and future public transport provision.*

7) *support flexibility for temporary or 'meanwhile' uses of vacant properties.*

D *Development proposals should:*

1) *ensure that commercial floorspace relates to the size and the role and function of a town centre and its catchment*

2) *ensure that commercial space is appropriately located having regard to Part A and B above, and is fit for purpose, with at least basic fit-out and not compromised in terms of layout, street frontage, floor to ceiling heights and servicing*

3) *support efficient delivery and servicing in town centres including the provision of collection points for business deliveries in a way that minimises negative impacts on the environment, public realm, the safety of all road users, and the amenity of neighbouring residents.'*

4) *support the diversity of town centres by providing a range of commercial unit sizes, particularly on larger-scale developments'.*

2.24 **Policy SD8** 'Town centre network' sets out a series of principles:

- *'The changing roles of town centres should be proactively managed in relation to the town centre network as a whole This process should support sustainable economic growth across the Greater London boundary to enhance the vitality and viability of London's centres and complement those in the Wider South East.*

- *Identified deficiencies in the London town centre network can be addressed by promoting centres to function at a higher level in the network, designating new centres (see Annex 1) or reassessing town centre boundaries (see Policy SD7 Town centres: development principles and Development Plan Documents). Diversification in centres with current or projected declining demand for commercial, particularly retail, floorspace should be supported.*

- *These centres may be reclassified at a lower level in the hierarchy through a coordinated approach with local planning authorities.*

- *The classification of International, Metropolitan and Major town centres can only be changed through the London Plan. Changes to District, Local, Neighbourhood centres and CAZ Retail Clusters can be brought forward through Local Plans where supported by evidence in development capacity assessments and town centre health checks and subject to assessments of retail impact where appropriate.*

- *International, Metropolitan and Major town centres should be the focus for the majority of higher order comparison goods retailing, whilst securing opportunities for higher density employment, leisure and residential development in a high quality environment.*

- *District centres should focus on the consolidation of a viable range of functions, particularly convenience retailing, leisure, social infrastructure, local employment and workspace, whilst addressing the challenges* *of new forms of retailing and securing opportunities to realise their potential for higher density mixed-use residential development and improvements to their environment.*

- *Local and neighbourhood centres should focus on providing convenient and attractive access by walking and cycling to local goods and services needed on a day-to-day basis.*
- *Boroughs and other stakeholders should have regard to the broad policy guidelines for individual town centres in Annex 1 including:*

  1) *indicative growth potential (commercial and residential)*
  2) *centres associated with the Areas for Regeneration (see Policy SD10 Strategic and local regeneration)*
  3) *night-time economy roles (see Policy HC6 Supporting the night-time economy)*
  4) *viable office locations including those with strategic office development potential and/or need to retain existing office functions in light of office to residential permitted development rights (see Policy E1 Offices).'*

Local Policy Context

Bromley Local Plan (2019)

2.25 The Bromley Local Plan (2019) was formally adopted in January 2019 and provides the statutory Development Plan for Bromley. Paragraph 6.2.2 sets out a hierarchy of the Borough's town centres, as listed below and shown spatially on **Figure 2.1**. This hierarchy of centres forms the basis of the town centre health check assessments set out in **sections 5-11** of this report.

- **Metropolitan Centre – Bromley**
- **Major Centre - Orpington**
- **District Centres – Beckenham, Crystal Palace, Penge, Petts Wood, West Wickham**
- **Local Centres – Biggin Hill, Chislehurst, Hayes, Locksbottom, Mottingham**
- **Neighbourhood Centres and Local Parades – 67 across the Borough**

Figure 2.1 Retail centres in LBB

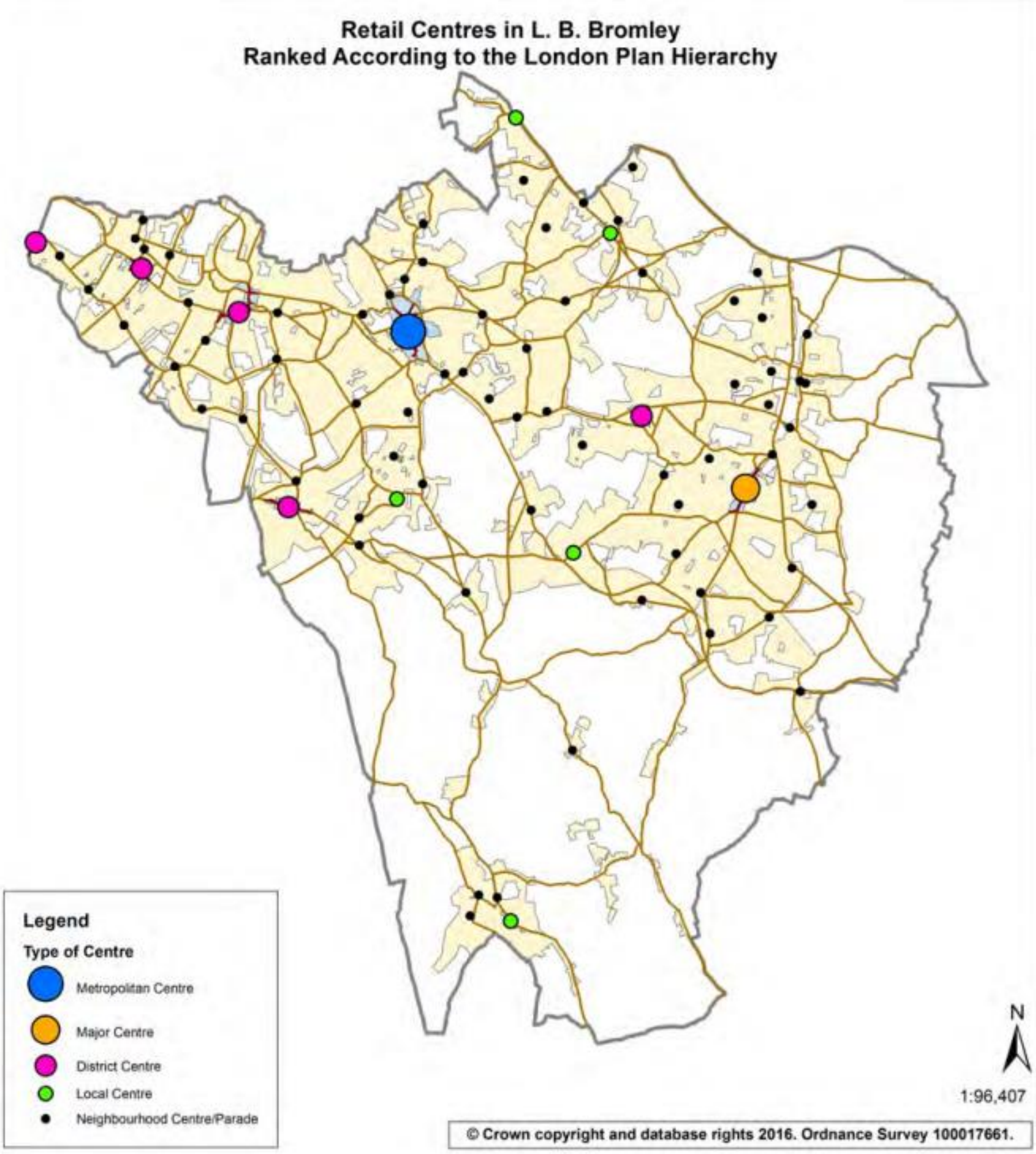


Image source: Bromley Local Plan 2019

<u>Crystal Palace</u>

2.26 As shown in the text box at **paragraph 2.26** and on the map at Figure 2.1, one of the district centres in LBB is at Crystal Palace. Somewhat unusually, Crystal Palace is a cross-authority centre and parts of the district centre fall within the London Borough of Croydon and the London Borough of Lambeth[1]. The administrative boundary with the London Borough of Southwark also sits a short distance to the north of the district centre. Crystal Palace is, in broad terms, a triangular district centre, meaning that LB Bromley, Lambeth and Croydon are each responsible for one main commercial street in the district centre. This is shown visually on **Figure 2.2** which is a 'composite' of the defined boundaries of the district centre taken from each authority's Local Plan proposals map. It is also noted that the boundary of Mottingham local centre falls between LB Bromley and RB Greenwich, with the majority of the centre falling within the former.

Figure 2.2 Composite map of Crystal Palace district centre

[1] Please see Section 4 of report for discussion of policy approach of the adjacent LPAs in respect of Crystal Palace.

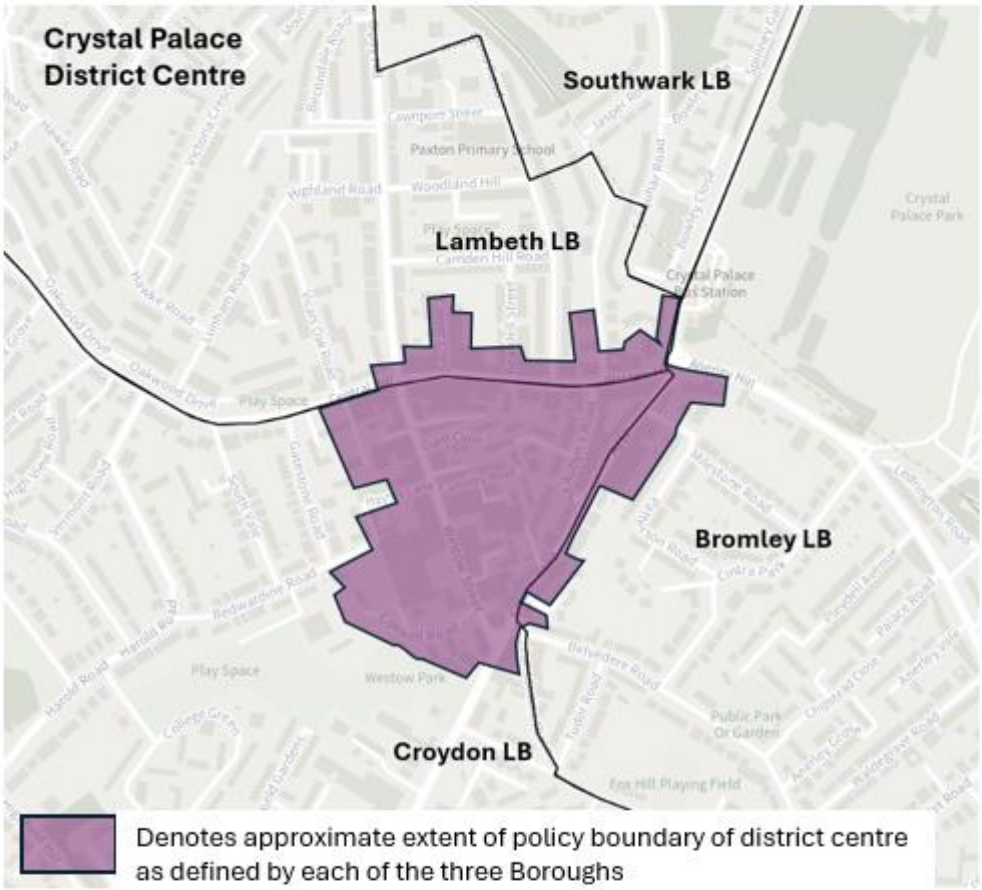


Image source: Firstplan

<u>Other relevant Local Plan policies</u>

2.27 **Policy 90** 'Bromley Town Centre Opportunity Area' states that the Council will prepare an Opportunity Area Planning Framework for Bromley Town Centre to deliver a minimum of 2,500 homes and an indicative 2,000 jobs. This will form an early review of the Bromley Town Centre Area Action Plan and implementation of the Bromley Town Centre Housing Zone, as agreed by the Mayor in 2016, to promote Bromley's strategic role as a Metropolitan Town Centre and the Opportunity Area.

2.28 **Policy 91** 'Proposals for Main Town Centre Uses' stipulates that main Town Centre uses are to be located within designated Town Centres or, if no in-centre sites are available, sites on the edge of centres. Only if suitable sites are not available in Town Centres or in edge of centre locations should out of centre sites be considered. Proposals for new main Town Centre uses outside of existing centres will be required to meet the sequential test as set out in the NPPF. Proposals for retail, leisure and office development outside of the Town Centres, over 2,500 sqm should include an assessment of:

'a - the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal, and

b - the impact of the proposal on Town Centre vitality and viability, including local consumer choice and trade in the Town Centre and wider area, up to five years from the time the application is made.'

2.29 **Policy 92** 'Metropolitan & Major Town Centres' explains that new development within Bromley Town Centre will be required to contribute positively to the town's status as an Opportunity Area and Metropolitan Centre. Likewise, Orpington Town Centre is expected to provide a range of uses in line with its role as a Major Centre. Regarding primary frontages in both centres, change of use application away from Class A1 (Class E) will only be permitted if a proposal meet a number of criteria. The council also provides a set of criteria that must be met for change of use proposals contained within secondary frontages.

2.30 **Policy 93** 'Bromley Shopping Centre' states that Council will only permit a change of use away from retail (Class A1) within the main shopping centre provided that the centre's primary retail function is not adversely affected.

2.31 **Policy 94** 'District Centres' stipulates that the council will consider a change of use away from Class A1 (Class E) of both primary and secondary frontages within defined districts centres provided a set a criteria is met, with specific criteria set for primary and secondary frontages.

2.32 **Policy 95** 'Local Centres' details that proposals for change of use away from Class A1 (Class E) will only be permitted provided a set of criteria is met.

2.33 **Policy 96** 'Neighbourhood Centres, Local Parades and Individual Shops' emphasises that need to retain Class A1 shops, to support the provision of essential daily goods and services. In more rural parts of the borough, the council will only permit changes away from Class A1 where:

'a - it would not harm the vitality and viability of the surrounding community, and

b - the use is appropriate and serves the local community.'

2.34 **Policy 97 '**Change in Use of Upper Floors' explains that the conversion of upper floors of shops or commercial premises to residential, community, office accommodation, or leisure within Town Centre areas will be permitted, provided that a set of criteria is met including design considerations and residential amenity.

Supplementary Planning Documents

Bromley Town Centre Supplementary Planning Document (2023)

2.35 The Bromley Town Centre Supplementary Planning Document (SPD) (2023) provides guidance on the interpretation of adopted planning policies as they relate to the Bromley town centre area. The SPD assesses the varied characteristics of Bromley town centre by reference to character areas which include 'development opportunities' including allocated and non-allocated sites. As emphasised by the council, guidance on non-allocated sites does not equate to a site allocation. The SPD separates the town centre into 'character areas' which also include sub character areas which are considered helpful to summarise as they are considered to remain an effective summary of the different parts of the town centre, as shown on **Figure 2.3.** Discussion of each of the character areas is then provided beneath Figure 2.3.

Figure 2.3 Bromley town centre character areas map

Source: Bromley Town Centre Supplementary Planning Document (2023)

<u>Bromley North Character Area</u>

2.36 Bromley North is divided into three separate Sub Character Areas including Bromley North Gateway, North Village and North High Street. Bromley North Gateway is centred around Bromley North Railway Station and is identified as having a high development potential. North Village is characterised as a predominantly fine grain area between the High Street and the A21, comprises a mixture of residential, commercial and social uses. North High Street which includes the area north of Market Square and includes commercial and office space up to London Road. This area is identified as having low development potential.

<u>Bromley West Character Area</u>

2.37 Bromley West is divided into two separate sub character areas; High Street and Church House. The High Street includes part of the Bromley High Street south of Market Square, up to Bromley South Station. This area sees a significant concentration of retail, cultural and leisure uses and has medium to high development potential.

Church House is the area to the west of the High Street and is characterised by low density housing. This area is classified as having low development potential.

Bromley East Character Area

2.38 This Character Area is divided into The Glades & Elmfield Road along with the Civic Centre / Bromley Palace. The Glades & Elmfield Road sub character area includes the Glades Shopping Centre, retail units at the Mall, the Pavilion leisure centre and various office buildings. This area has identified as having high development potential. Civic Centre / Bromley Palace is located in the former estate of Bishop's Palace and contains a number of council offices including the Civic Centre. This area deemed to have medium development potential.

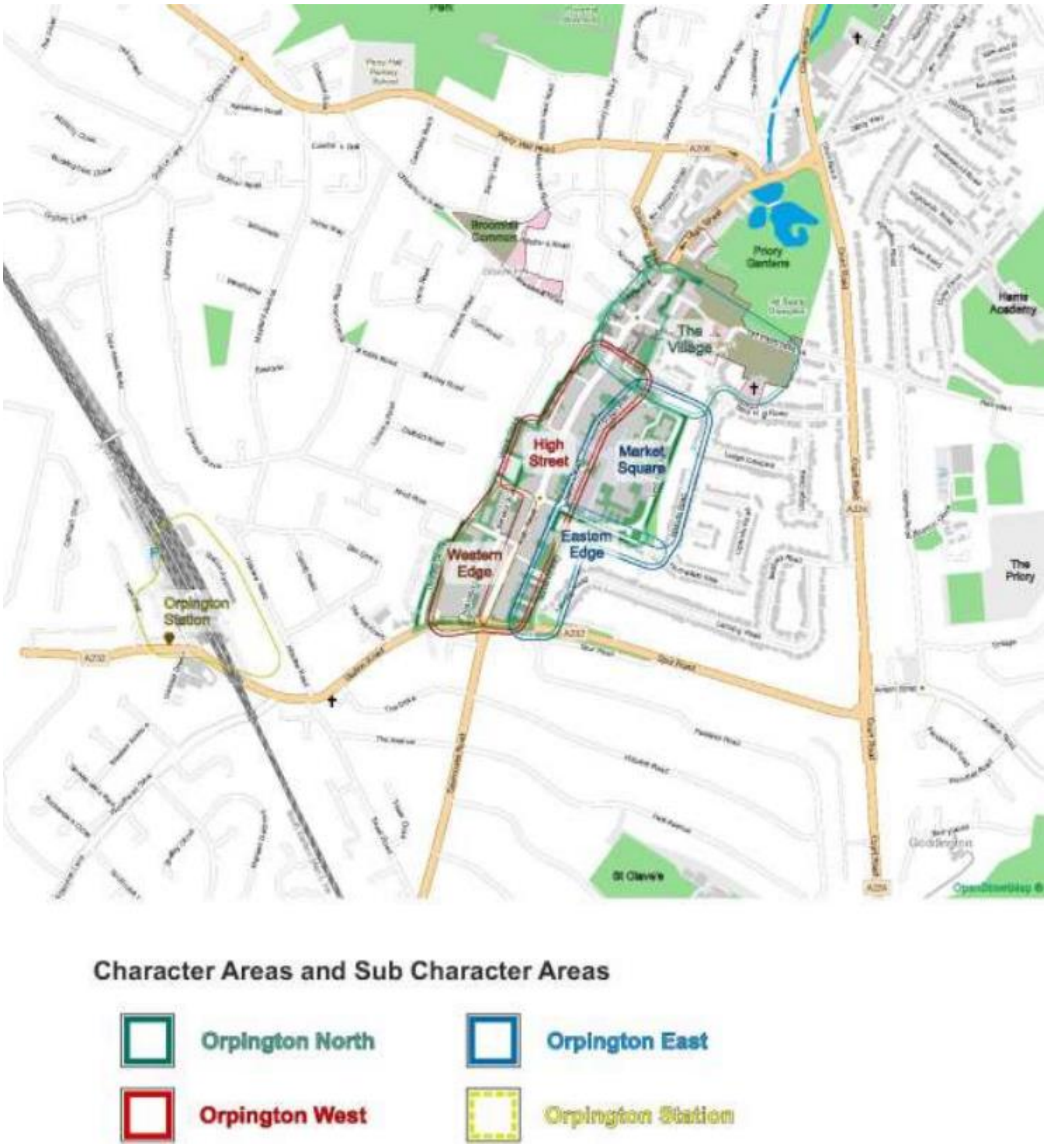
Bromley South Character Area

2.39 Bromley South comprises the land around Bromley South Railway Station at the bottom of the High Street, containing a mix of commercial, retail and residential uses. Within this area, buildings heights range from three to six storeys whilst two buildings extend to 17 and 19 storeys. This area is assessed to have high development potential.

Orpington Town Centre Supplementary Planning Document (July 2023)

2.40 The Orpington Town Centre Supplementary Planning Document (July 2023) provides guidance on the interpretation of adopted planning policies as they relate to the Orpington Town Centre area. Similar to the Bromley Town Centre SPD, character areas are identified which include 'development opportunities' but for non-allocated sites, the guidance does not equate to a site allocation. These are shown on **Figure 2.4.**

Figure 2.4 Orpington Town Centre Character Areas Map



Orpington North Character Area

2.41 This area is the historic centre of Orpington which contains the oldest and most significant historic buildings. The land use is predominantly residential with some commercial uses on the High Street. Given the wealth of heritage assets including several listed buildings and the Priory Conservation Area, the area has low development potential.

Orpington West Character Area

2.42 Orpington West is divided between two sub character areas; Orpington High Street and Western Edge. Orpington High Street contains a mix of retail, leisure, cultural and office uses, this area is classified as having medium development potential. Western Edge is located to the west of the High Street and contains significant areas of office space. This area is assessed to have low to medium development potential.

Orpington East Character Area

2.43 The sub character areas within Orpington East includes the Market Square, Orpington College & the Walnuts Shopping Centre and Leisure Centre sub character area as well as the Eastern Edge sub character area. The Market Square sub-character area and adjacent areas comprise a mix of uses including retail, leisure, education and social infrastructure, which are identified as having 'high development potential'. The Eastern Edge sub-character area is characterised as being a largely underdeveloped backland area between the High Street and the suburban areas to the east of the town centre. This area is considered to have 'medium development potential'.

Orpington Station Character Area

2.44 This area is centred around the station and is made up of an area between the railway and the established suburb of Crofton. The supporting text sets out that due to its location, the station currently feels slightly detached from the town centre but should not be conceived of in design terms as being a separate or unrelated entity. This area is identified as having medium development potential.

Relevant other Evidence Base studies

London Borough of Bromley Evening & Night Time Evidence Base Study

2.45 In parallel with the preparation of this study, LBB have instructed Avison Young, in association with MAKE Architects, to prepare an Evening & Night Time Economy Evidence Base Study. The study provides a comprehensive review of evening and night time activity across the Borough's centres, setting out strengths, weaknesses, opportunities and threats, and sets out potential interventions and strategic recommendations which LBB can consider. There is clear overlap between Avison Young's study and this report in terms of assessing the contribution which the evening and night time economy can make to the overall vitality and viability of the Borough's network of centres and, accordingly, considering of the key findings and recommendations of both studies is recommended when developing strategic recommendations.

2.46 The study articulates the value of the evening and night time economy, noting that evening and night time activity can '*support a broad range of local policy objectives such as regeneration, place making, tourism, inclusion, personal wellbeing, and local business growth ' and that a well-managed night-time economy can 'help to reduce or overcome some of the costs and negative perceptions associated with more traditional evening and night-time activity'.* The economic benefits of a night time economy are also set out, with the report noting that '*Evening and night time activity is also important for local economies across London but is more prominent in some boroughs than others. Night time activity contributes significantly to Gross Value Added in Westminster (£986m each year), Hackney (£111m) and Lambeth (£179m) for example. These figures are also likely to be an underestimation as they focus on entertainment and leisure uses only*.'

2.47 Crucially, it also notes that '*Evening and night time activity also provides a unique atmosphere and experience. Museums, events, bars, clubs, restaurants, community centres and other assets allow people to relax, unwind, socialise and enjoy their leisure time in a different way to during the day. This brings a range of intangible and difficult-to-quantify benefits related to wellbeing and quality of life.'*

2.48 It is understood that that the evidence base study focussed on Bromley, Beckenham, Orpington, Penge and Biggin Hill. The following observations were made on these centres:

- *'Penge Town Centre's defining feature versus the borough's other town centres is its diversity of pubs – it has traditional pubs (e.g. the Moon & Stars and The Crooked Billet), gastropubs (e.g. The Alexandra and Goldsmith Arms) and craft beer taprooms (e.g. Southey Taproom, Craft Metropolis and BR3WERY).*

- *Orpington Town Centre's main evening and night time strength is its diversity, range and quality of restaurants. It boasts a number of options including Italian (e.g. Dolce Italia), Turkish (e.g. Ephesus), Mexican (e.g. Fiesta Mexicana), Chinese (e.g. Xian), Japanese (e.g. Simply Sushi), Pan Asian (e.g. Miso Noodle Bar) and British (e.g. Scott's Pie and Mash). It is also a major civic hub – home to Orpington Library, London South East College's Orpington Campus, the Walnuts Leisure Centre and Orpington Village Hall.*

- *Beckenham Town Centre's main differentiator its strong evening and night-time economy — it is well-known for its offer and its pubs, bars and nightclubs attract people from across South London.*

- *Unlike the borough's other town centres Bromley has good 'non-traditional' assets as well as a more 'traditional' mix of pubs, bars, clubs and restaurants. Notable characteristics include a mix of cultural venues (e.g. Churchill Theatre and Bromley Picturehouse), family friendly leisure activities (e.g. Rhino Boulder and New Wave Academy) and active leisure options (e.g. Pavilion Leisure Centre and F45).*

- *Biggin Hill's defining feature is that its offer is highly localised and is targeted at its local catchment.'*

2.49 The study also identifies that, whilst not considered in full by the study, Chislehurst also has a prominent evening/night time economy. It also highlights the easy accessibility to central London and its associated world-class evening and night time offer for many residents in the Borough, as well as other locations surrounding the Borough including Brixton, Peckham, Lewisham, Bexleyheath and Croydon.

2.50 The study identifies the following priorities for improving the evening/night time economy offer in Penge:

- *'Encouraging food and beverage businesses to cluster in certain areas (i.e. Maple Road and Penge Green) to build on emerging concentrations and support the growth of local evening and night time specialisms.*

- *Supporting local cultural anchors and services to open later and engage more with the night (i.e. Penge Library, National Sports Centre, Tension Art Gallery and Matico Dance Studio).*

- *Extending day time events longer into the evening (e.g. Penge Festival) and organising more family-friendly events at night similar to those already taking place (e.g. Halloween Trail).*

- *Leveraging opportunities and spend from major events happening in nearby areas (e.g. music and sporting events in Crystal Palace Park).*

- *Capitalising on major development projects (e.g. re-development of Blenheim Centre) to create a stronger evening and night time by addressing gaps in the offer and strengthening existing evening and night time specialisms.'*

2.51 For Orpington, the following priorities were identified:

- *'Promoting the area for its food and beverage offer.*

- *Supporting later opening and activation of civic assets.*

- *Utilising public spaces through temporary or permanent activities.*

- *Leveraging forthcoming development (i.e. Walnuts Shopping Centre) to address gaps in the evening and night time offer and encourage local specialisms.*

- *Encouraging station users to 'turn left' and use the Town Centre on their way to and from the station.'*

2.52 For Beckenham, the following priorities were identified:

- *‘Improving the management of the late night to reduce conflicts and other externalities.*
- *Building an event offer that makes the Town Centre more welcoming to more people at night.*
- *Encouraging local health, fitness and wellbeing assets to open later into the evening.*
- *Enhancing the public realm to encourage late night activity, improve navigability and improve feelings of safety.*
- *Building local capacity so businesses and community groups can take a leadership role in managing the Town Centre in the absence of a BID.’*

2.53 For Bromley, the following recommendations were made:

- *‘Enabling diverse uses in the core Town Centre that build on existing cultural, family and leisure specialisms through proactive planning and licensing.*
- *Harnessing and building on the successful NTEZ programme.*
- *Utilising public and green spaces better to build on existing cultural, family and leisure specialisms.*
- *Encouraging retailers to stay open later into the evening, including those in the Glades Shopping Centre.*
- *Prioritising areas for improved lighting, CCTV and public realm investments.’*

2.54 And finally for Biggin Hill, the following recommendations were made:

- ‘Extending the operational hours and activity schedule of the Swimming Pool at weekends.
- Encouraging cafes and beauty salons to open later into the evening.
- Introducing better lighting and CCTV to improve perceptions of safety at night.
- Harnessing the opportunities presented by the high-quality recreation ground.
- Supporting supermarkets to open car parks later into the evening, and to allow people to park for longer after 6pm.’

2.55 Avison Young concluded that looking across all of the town centres which were assessed by the study, the following common topics to address or capitalise on could be identified. It is noted by the study that the challenges identified below are not unique to Bromley but reflect those experienced by many authorities across the country.

- ‘*Encouraging ‘non-traditional’ assets and services to open later into the evening.*
- *Improving perceptions of and actual safety through tactical public realm investments.*
- *Making better use of public and green spaces.*
- *Better managing the negative impacts of ‘traditional’ evening and night time activities.*
- *Diversifying the offer to encourage more evening and night time uses.*
- *Leveraging forthcoming development to support evening and night time activity.’*

SECTION 3 | RETAIL & LEISURE MARKET CONTEXT

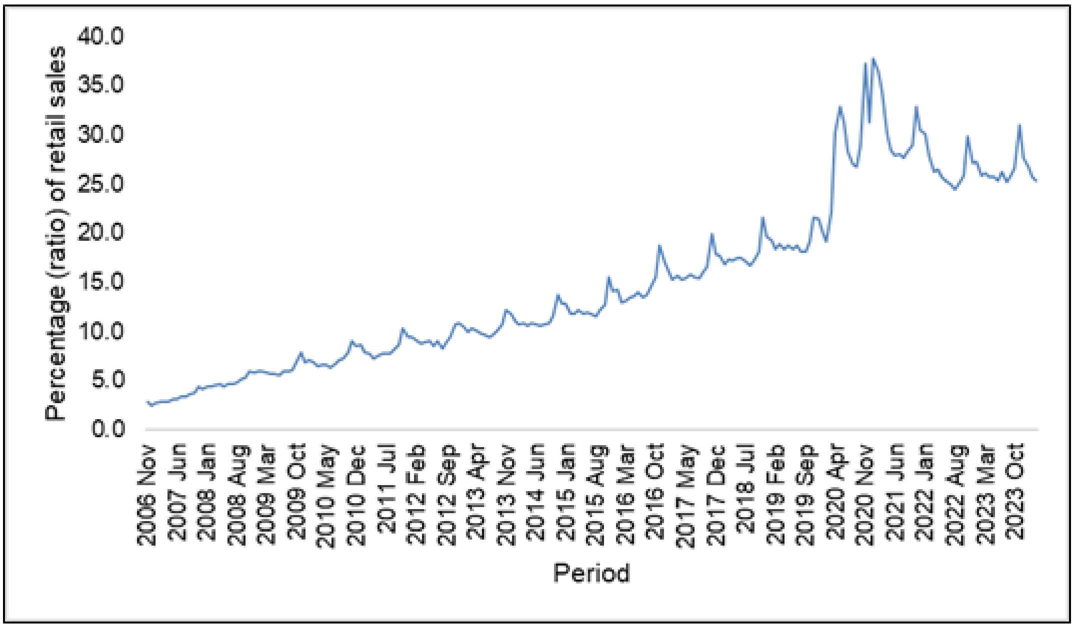
3.1 In this section, to provide context to the LBB-specific analysis in later sections of the report, we set out an appreciation of the wider retail and commercial leisure market context within which our study has been prepared. This provides a snapshot of the market at the time of preparation of the study (early 2024); it is advised from the outset that the retail and leisure market historically has been — and continues to be — fast moving and highly susceptible to wider economic circumstances and trends. Therefore, the analysis below should be considered a ‘snapshot’ and regular monitoring of the trends and issues identified, and their potential implications for centres in LBB, should be undertaken throughout the course of the Council’s new Local Plan period.

3.2 The analysis in this section has been prepared by **Urbá**, and forms part of a detailed property market report for LBB which is enclosed as **Appendix 1.** The discussion in this section should be read alongside Urbá’s report, which also contains commentary on levels of retail and leisure demand and market sentiment for the Borough’s main centres, which is also drawn on in our health check analysis in subsequent sections of our report.

Retail & Leisure Market Overview

3.3 Before the global pandemic, the retail market was going through a structural change. The structural changes in the retail market were caused by the growth in online sales and declining footfall in town centres. As shown in Figure 3.1 throughout the UK this was a relatively gradual increase year-on-year but the global pandemic significantly accelerated the growth. Following the lifting of the Covid-19 restrictions internet sales have fallen from their pandemic peak, but they are still around 25% higher than their pre-pandemic level.

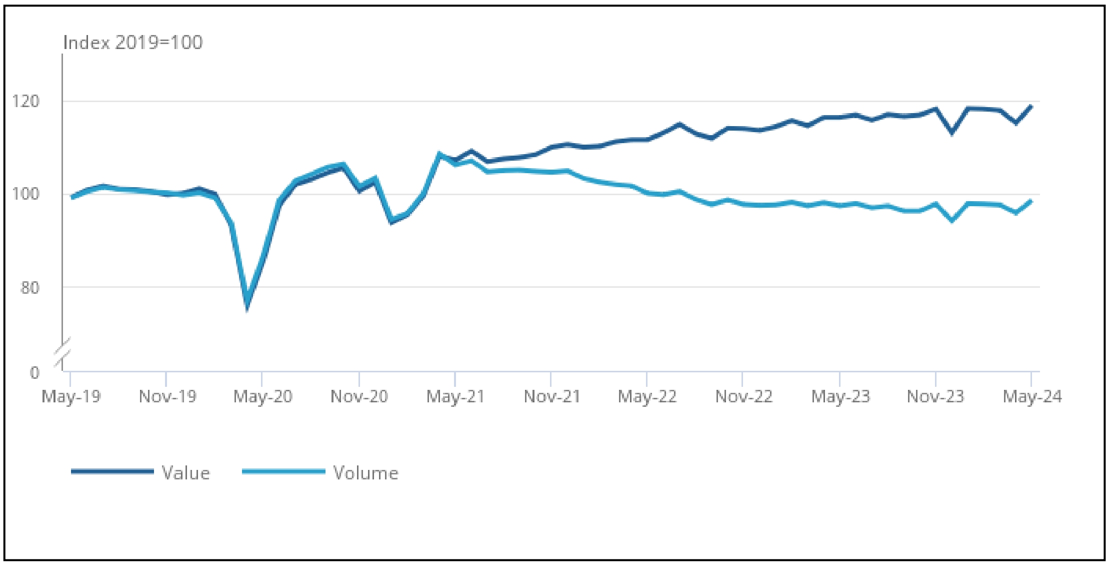
Figure 3.1 UK Internet sales as a percentage of total retail sales (ratio) (%)



Source: ONS (19 April 2024). Data provided via Urbá.

.3.4 As we emerged from the global pandemic there were different challenges faced by the sector, most notably inflation and the wider “cost of living crisis.” Inflation has been caused by higher fuel costs and raw materials such as wheat, barley, maize, rapeseed and rapeseed oil, sunflower seed and sunflower oil being more scarce following the Russian war in Ukraine. To try and control inflation the Bank of England has raised interest rates (from a historic low of 0.1% to 5.25%, recently reduced to 5.0%), adding further costs to households and businesses. Overall, businesses have had to increase prices and households have less disposable income. As we see in Figure 3.2 this is impacting the retail sector with the volume of sales below the pre-pandemic level.

Figure 3.2 Retail volume and value sales, seasonally adjusted, Great Britain, May 2019 to May 2024



Source: Monthly Business Survey, Retail Sales Inquiry from the ONS. Data provided via Urbá.

3.5 Due to the weakening of physical format retail combined with the weaker market, this has led to a fall in development activity. Construction News reported[2] that no major projects (classified as £100 million or more) started on site during the three months to March 2024, this was unchanged from the previous three months. They also indicate that detailed planning approval for retail also fell by 3% compared to the previous three months, to stand 13% down on the previous year. However, the London market appears more robust than the regional markets, with Construction News reporting that the capital has the highest proportion of retail planning approvals, during the three months to March 2024, with a 36% share, having increased 42% against last year's levels.

Convenience retail

3.6 The convenience retail sector has seen a significant change since the global financial crisis in 2008. In the years following 2008, supermarkets appeared to have weathered the economic storm with most operators aggressively expanding (commonly referred to as the "race for space"). Operators were able to competitively bid for sites as they were taking advantage of other sectors in the property market being much weaker. During this period of growth, there was a strong appetite from operators to open large-format / hypermarket-sized stores of up to circa 11,150 sq m. This format provided a mixture of convenience and comparison retail, including extensive clothing, electronic goods, and homewares ranges for example.

3.7 Following this we have since seen a change in shopping patterns, with more of a reliance on online shopping for "main" food shops combined with customers supplementing a "big" shopping trip with regular smaller "top up" shops during the week. This led to operators shifting away from seeking to develop further large format stores and opening more c-stores (units of less than 280 sq m, which allows them to trade all day on a Sunday) with stores such as Tesco Express and Sainsbury's Local significantly growing in numbers over the last decade. More recently Asda has started to roll out its Express store format and online retailer Amazon has cautiously grown their Amazon Fresh brand.

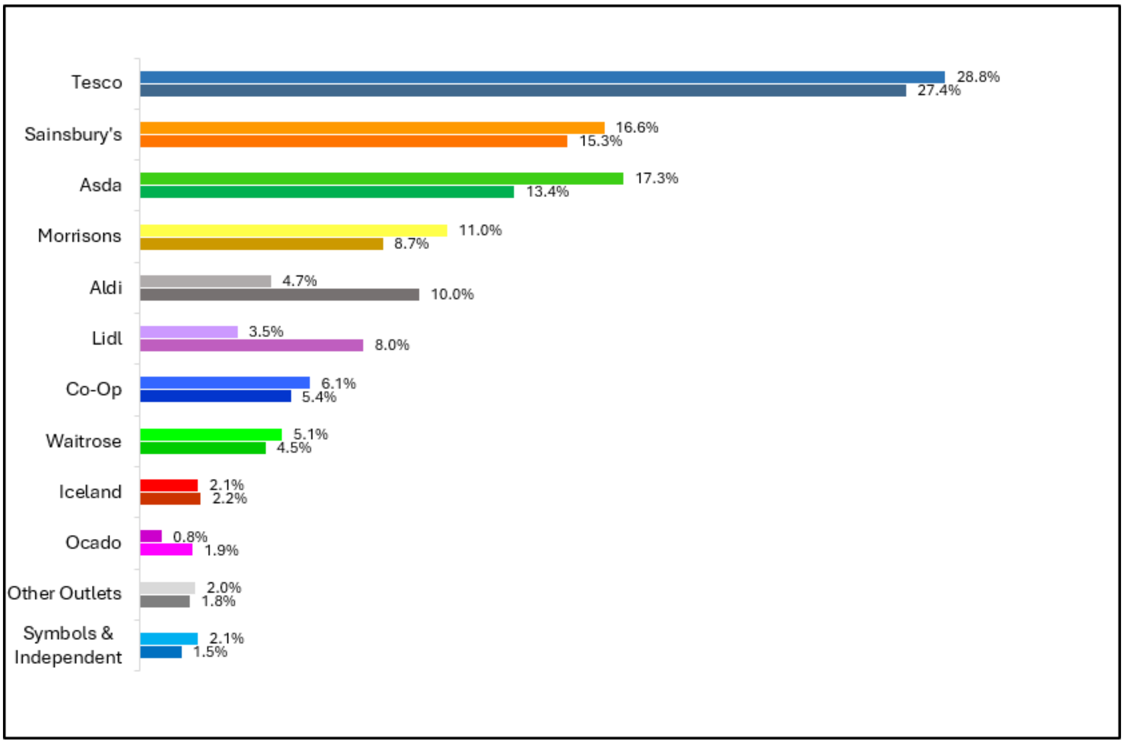
[2] UK construction activity March 2024: Retail | Construction News

3.8 The most significant trend in the convenience goods sector 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.

3.9 Significantly, 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. Lidl are currently only marginally behind Morrisons in terms of market share, and Lidl and Aldi combined now have 18%[3] of the market share in the grocery sector. In addition to securing additional sites for new stores, both companies are also in some cases seeking to enlarge or redevelop existing facilities to provide larger sales area to accommodate the additional numbers of customers which their stores now attract. **Figure 3.3** shows the market share of main grocery retailers at April 2014 and April 2024, showing how the traditional 'big four' supermarket operators (Tesco, Sainsbury's, Asda and Morrisons have all lost market share over the past decade (Asda and Morrisons most significantly), and Aldi and Lidl have both seen market share grow significantly — from 4.7% to 10.0% for Aldi and from 3.5% to 8.0% for Lidl.

3.10 Aldi currently operate stores in Bromley at St Paul's Cray and on the western edge of the borough at Anerley. Lidl are more strongly represented across the Borough with stores in a number of town and local centres, namely Bromley town centre; West Wickham district centre; Locksbottom and Mottingham local centres; and out of centre at St Paul's Cray. They have also in recent years acquired a former Waitrose at Sundridge Park. We would anticipate both Lidl and Aldi to seek to expand their presence in the Borough further in the forthcoming years.

Figure 3.3. Grocery market share, comparison between 2014 and 2024 (figures for Great Britain)



Source: Kantar WorldPanel (April 2024). Note: top row within each operator denotes grocery market share at April 2014. Bottom row within each operator denotes grocery market share at April 2024.

[3] As of April 2024

Comparison retail

3.11 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 we saw further changes within the comparison goods sector that included:

- **Intu** – one of the UK's largest shopping centre owners, with the likes of Trafford Centre and Lakeside (and a former owner of The Glades Shopping Centre, at the time known as Intu Bromley) entered administration in September 2020.
- **House of Fraser** – the fashion retailer entered administration in August 2018 and was bought by Sports Direct International (now Frasers Group) on a pre-packaged insolvency basis which involved the stores, brand and stock. Since the purchase of House of Fraser, the Frasers Group has reduced the number of stores from 59 to 28. House of Fraser have not historically had representation in LBB.
- **Debenhams** – entered administration in April 2020, despite previously agreeing to a CVA in March 2020, which led to closing all of the stores in 2021. Debenhams was represented in LBB through a large store in Bromley town centre and a smaller store at Nugent Shopping Park in Orpington.
- **All Saints –** the fashion retailer agreed to a Company Voluntary Arrangement (CVA) which resulted in them changing to turnover rents rather than fixed rents.
- **HMV –** in 2018 the music store entered administration for the second time in 6 years. It was bought by Sunrise Record owner Doug Putman in 2019. It is now trading well and is expending its store estate, including reopening a store on Oxford Street that was closed as part of the 2018 administration. HMV has a store in Bromley town centre which remained trading throughout the 2018 administration.
- **Arcadia Group –** the owner of Topshop, Topman, Burton, Dorothy Perkins, Miss Selfridge, Wallis and Evans entered into administration in November 2020, this was following a CVA in June of the same year. Following the administration, online fashion retailer ASOS bought Topshop, Topman and Miss Selfridge brands and another online fashion retailer BooHoo bought the Dorothy Perkins, Wallis and Burton brands. Neither deal involved the purchase of the physical stores, which therefore all closed. The former Topshop/ Topman unit on High Street in Bromley remains a prominent vacant unit, although there are proposals to relocate Bromley Library into this premises.
- **Wilko –** the budget homeware chain entered administration in August 2023 which led to all the stores closing. B&M Stores bought 51 of their stores but many of the circa 400 stores were left vacant. The business was subsequently purchased by The Range who have reopened a small number of stores (retaining the Wilko name); however most units remain vacant. Wilko's large store in Bromley town centre remains a prominent vacant unit; a smaller former Wilko store in Orpington has been re-let to Poundstretcher.
- **Oasis and Warehouse** – entered administration in April 2020 with all of its 92 stores closed and 400 concessions terminated. The brands and e-commerce platforms were sold in June 2020 to online fashion retailer Boohoo.

3.12 The comparison retail sector remains challenging due to spending constraints caused by high living costs. The sector has also faced cost pressures including rising business rates, an increase in living wage, and disruption to shipments from the Far East via the Red Sea. The British Retail Consortium reported that non-food sales decreased by 1.5% over the three months to December 2023, which was a steeper decline than the 12-month average for the year of 2023. This has resulted in some retailers seeking to reduce their physical footprint largely (but not exclusively) in town centres, for example:

- **Argos** will close 100 stores in 2024 – this is part of an estate rationalisation by its owner Sainsbury, with some of the standalone Argos stores being relocated into excess space in their supermarkets.

- **Boots** said it will close 300 stores between 2023 and 2024, which mostly appear to be stores where the retailer has duplications with other stores nearby.
- **M&S** said 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 operations.
- **New Look** closed 17 stores in 2023 as part of a restructuring to cut their real estate portfolio in half.

3.13 Despite the challenges, some retailers are performing better, with:

- **Primark** reported a 7.9% increase in sales for quarter 1 2024 and announced in February 2024 that it will invest more than £100 million in its UK stores in 2024.[4] This investment includes new stores in Bury St. Edmunds (opened in March 2024), Teesside Park and Glasgow Fort, along with store expansions in London's Westfield Stratford (almost doubling the size to more than 7,500 sq m) and the Metrocentre in Gateshead (increase to around 7,400 sq m).[5]
- **Next** reported record profits ahead of expectations as sales increased in the full year ending January 31, 2024 uplift in its half-year figures to March 2023.[6]
- **Zara** – the fashion retailer has recently (May 2024) opened a new larger store in the Meadowhall Shopping Centre, Sheffield of 3,400 sq m, and are expanding their store at Liverpool ONE from 2,500 to 3,900 sq m.
- **Uniqlo** – the Japanese high street fashion brand has opened new stores on Oxford Street (May 2024) and Edinburgh (April 2024) and is due to open in Coal Drops Yard in King's Cross.
- **Frasers Group** – reported an 8% increase in its half-year pre-tax profits in December 2023.[7] As part of their growth, they opened "elevated" stores in 2023 of Flannels and Sports Direct stores in Gateshead Metrocentre, as well as a Sports Direct and Frasers flagship in Norwich.[8]
- **Søstrene Grene –** the Danish homeware store announced in July 2023 that they are looking to open 100 new stores across the UK

3.14 Due to the uncertainties in the retail market investors, developers and local authorities are working together across many town centres to "re-purpose" the offer, with less reliance on retail and bringing in other uses. In addition, retailers are rethinking the purpose of their physical stores by improving the in-store experience – with the current buzzword being "hybrid shopping" – through creating a store that serves multiple purposes such as a showroom, a distribution hub, a customer service centre, an entertainment venue and whatever else the consumer needs it to be. The hybrid retail concept also provides customers with a variety of options when it comes to fulfilling their orders such as curb side/in store pick-up, localised (products ordered at local store hours after delivering online), and traditional courier.

Leisure market

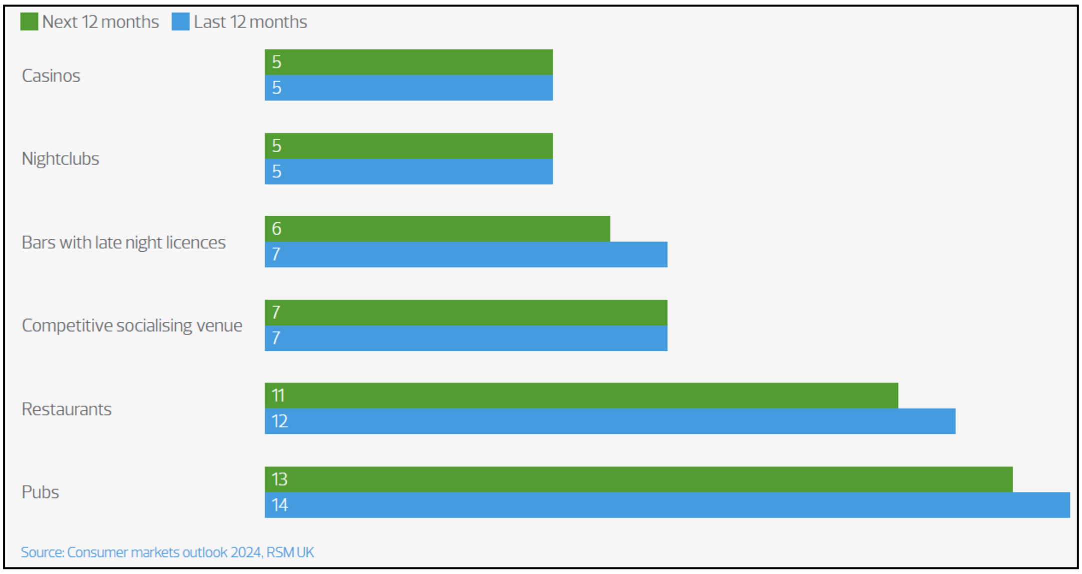
3.15 As with the retail market, the leisure market has also faced cost pressures including the increase in the national living wage, energy bills, business rates and ingredients. In addition, the industry has faced staff shortages following Brexit and the Covid-19 pandemic.

3.16 RSM report the average number of visits to hospitality venues 2023 vs potential in 2024 - see **Figure 3.4.** The data shows on average there were five visits by consumers to Casinos and Nightclubs in 2023 and the same number is predicted in 2024 – therefore the number of visits is forecasted to be stagnant, the same is true for

[4] Primark To Invest More Than £100 Million In Its UK Stores In 2024
[5] Ibid
[6] Retail Week, 21 March 2024, Next beats expectations to post record profits as sales soar
[7] https://www.retailgazette.co.uk/blog/2023/12/frasers-profits-jump/
[8] Ibid

competitive socialising with a fall in the potential number of visits to bars, restaurants, and pubs. Overall, RSM report that the outlook is not too positive for the sector.

Figure 3.4 Average number of visits to hospitality venues 2023 vs potential in 2024



Source: Consumer markets outlook 2024, RSM UK. Data provided via Urbá.

3.17 The flatlining of competitive socialising is against a backdrop of a boom in the industry. Savills report[9] that competitive socialising, which they described as encompassing a mix of experiential leisure activities, including urban mini golf; darts; axe-throwing; pin-pong; stop the clock, including breakout rooms; bowling; and virtual reality has grown at unparalleled levels over the past five years. Savills highlights that the key to future proofing the sector is either bringing multiple concepts together under one roof as a cluster of brands or via a "combo" style operator or having a clear brand identity backed up with a high quality offer.

3.18 Savills report[10] that consumer spending on the Food & Beverage (F&B) and leisure market is currently (2024) polarising, with people seeking value but that doesn't necessarily mean "cheap eats". This is echoed by Cushman & Wakefield who state[11] that people still want to go for dinner, but they will not settle for a sub-par experience. Overall, there is a mixed market:

- **Fast food** - Savills report[12] that these are flourishing and are 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 – this demand is resulting in rental growth. In October 2023, it was reported that burger restaurant Five Guys is seeking to increase their number of restaurants from 160 to 300 in the next few years,[13] and Bakery chain Greggs is seeking to expand from 2,330 shops to 3,000 including trailing a 24 hour drive-thru concept.[14]
- **Middle market brands** – these are having a varied performance:
    - Mitchells & Butlers (brands such as All Bar One, Miller and Carter, Toby Carvery) and Azzurri Group (ASK Italian, Zizzi, Coco di Mama and Boojum) appear to be performing reasonable.
    - Boparan Restaurant Group (BPR) - following the administration of Carluccio's it was bought by BPR in May 2020, which resulted in the closure of 40 restaurants and keeping 30 open. BPR which also

[9] Savills, 03 April 2024, Competitive Socialising: A Booming Sector Revolutionising Leisure Experiences
[10] Savills UK | Spotlight: UK Leisure – 2024
[11] Cushman & Wakefield, N.s, The UK F&B Sector is Serving Up Reasons to be Cheerful
[12] Savills UK | Spotlight: UK Leisure – 2024
[13] https://qsrmedia.co.uk/franchising/news/five-guys-build-140-restaurants-in-uk
[14] https://www.independent.co.uk/business/greggs-to-roll-out-150-new-stores-a-year-and-trial-24hour-drivethru-b2295569.html

owns brands such as Giraffe, Slim Chickens, and Gourmet Burger Kitchen reported an increase in turnover by £110.3million in the 52 weeks to 01 January 2023. In May 2024, BPR announced that it was entering a new agreement with CKE Restaurants to bring the American burger chain brand Carl's JR (burger chain) to the UK and Ireland.

  - TGI Friday's – reported flat revenue for the second half of 2023, and has announced they will not open any more sites until 2025, it is in money-saving mode as it grapples with financial restructuring.
  - The Restaurant Group (owner of Frankie & Benny's and Wagamama) was sold to Apollo Global Management in December 2023, this was after it paid £7.5 million to the Big Table Group (owner of Café Rogue, Las Iguanas, Banana Tree and Bella Italia) to take on the remaining Frankie & Benny's and Chiquito units.

- **Urban brands –** typically grown out of London, there are many brands that seek to provide an authentic dining experience based on a single country of origin. Many of these restaurants offer a more tailored dining experience therefore ensuring a sub-par experience is not delivered. In this category, we see Mowgli (Indian) intending to build out about four to five sites a year[15] and Comptoir Libonais (Lebanese and Middle Eastern) opened a new restaurant in Ealing High Street in October 2023 and a new flagship restaurant at the South Bank, London. In addition, Dishoom (Indian) have expanded this year (2024) to Cambridge and Oxford and it was reported[16] in May 2023 that Rosa's (Thai) has secured a £10 million bank facility to help fund new openings.
- **Coffee shops** – Savills report[17] that the larger brands such as Starbucks have been performing well but some brands have lost their place in the market, such as Le Pain Quotidien collapsing into administration in the summer 2023, its second administration since 2020, as well as poor-quality independents and cafés. Whereas in contrast brands such as Black Sheep Coffee are aggressively expanding, Gail's Bakery are targeting 35 new stores in 2024 [18] and Blank Street and seeking to increase their stores from 24 to 30 in London.[19]
- **Independents** – Savills report[20] that consumers have flocked towards local and small chains that deliver on authenticity, sustainability and community. Driving loyalty through social media is often key to these brands' success, as well as agility and fast decision-making through (mostly) organic growth. Successes include Blackbird Bakery which has recently opened in Penge and Beckenham.

LBB Market Overview

3.19 As we go on to demonstrate most centres in the Borough are performing well with low vacancies. Most centres provide a mix of national and independent retailers and have core offers catered towards meeting day to day shopping needs such as supermarkets and chemists. The leisure activity varies across all centres. The main risk to the centres is the ability of the larger units to be re-occupied when they become vacant.

3.20 **Table 3.1** shows that in the five years to 2023, the take-up of retail and leisure space in the Borough averaged 12,280 sq m per annum, over an average of 74 units. We see in 2023 the number of transactions significantly fell below the five year annual average, but the total floorspace was only slightly down on the five year annual average, which indicates those occupiers that were taking space were taking larger floorplates. Furthermore, it is not possible to tell from the data whether the reduction in the number of transactions in 2023 was a "one off blip" or a start of a longer term trend, and this is something the Council should seek to monitor moving forwards.

[15] Mowgli CEO outlines global expansion plans | Insider Media
[16] https://www.restaurantonline.co.uk/Article/2023/05/11/Rosa-s-Thai-secures-funding-from-Barclays-as-it-plots-further-expansion
[17] Savills UK | Spotlight: UK Leisure – 2024
[18] https://bakeryinfo.co.uk/retail/gails-bakery-managing-director-reveals-expansion-plans-for-2024/690504.article
[19] Blank Street: How the New York coffee chain plans to takeover London (cityam.com)
[20] Savills UK | Spotlight: UK Leisure – 2024

Table 3.1 Retail & leisure floorspace take-up, 2019- May 24, London Borough of Bromley

Calendar year	No. of transactions	Total take-up sq m	Minimum take up sq m	Maximum take up sq m
2019	107	13,972	20	829
2020	70	12,263	24	4,091
2021	85	13,667	23	880
2022	67	10,109	16	1,161
2023	39	11,386	27	3,024
2024*	6	1,130	69	325
Total	374	62,528	-	-
Annual Average 2019 - 2023	74	12,280	-	-

*Source: EGi Radius Exchange (May 2024) *until 03 May 2024. Data provided via Urbá.*

SECTION 4 | DEVELOPMENT IN COMPETING CENTRES

4.1 Bromley and its network of town centres do not exist in isolation, and the Borough is surrounded by a number of authority areas each with their own network of defined town centres. Bromley is surrounded by authorities including Croydon to the west; Lambeth and Lewisham to the north; Dartford and Bexley to the east; and Sevenoaks to the South. Residents in some parts of LBB are in closer or equally-close proximity to larger town centres outside the LBB as within; for example residents in the central-western part of the Borough benefit from easy access to Croydon town centre and the out-of-town retail offer along Purley Way; residents to the east of the Borough are in close proximity to Sidcup and Bexley; and some residents in the north-eastern corner of the Borough are close to centres such as Eltham and Lewisham. A plan of surrounding authorities and centres is shown in **Figure 4.1.**

Figure 4.1 Plan of network of LPAs and key town centres within and surrounding LBB

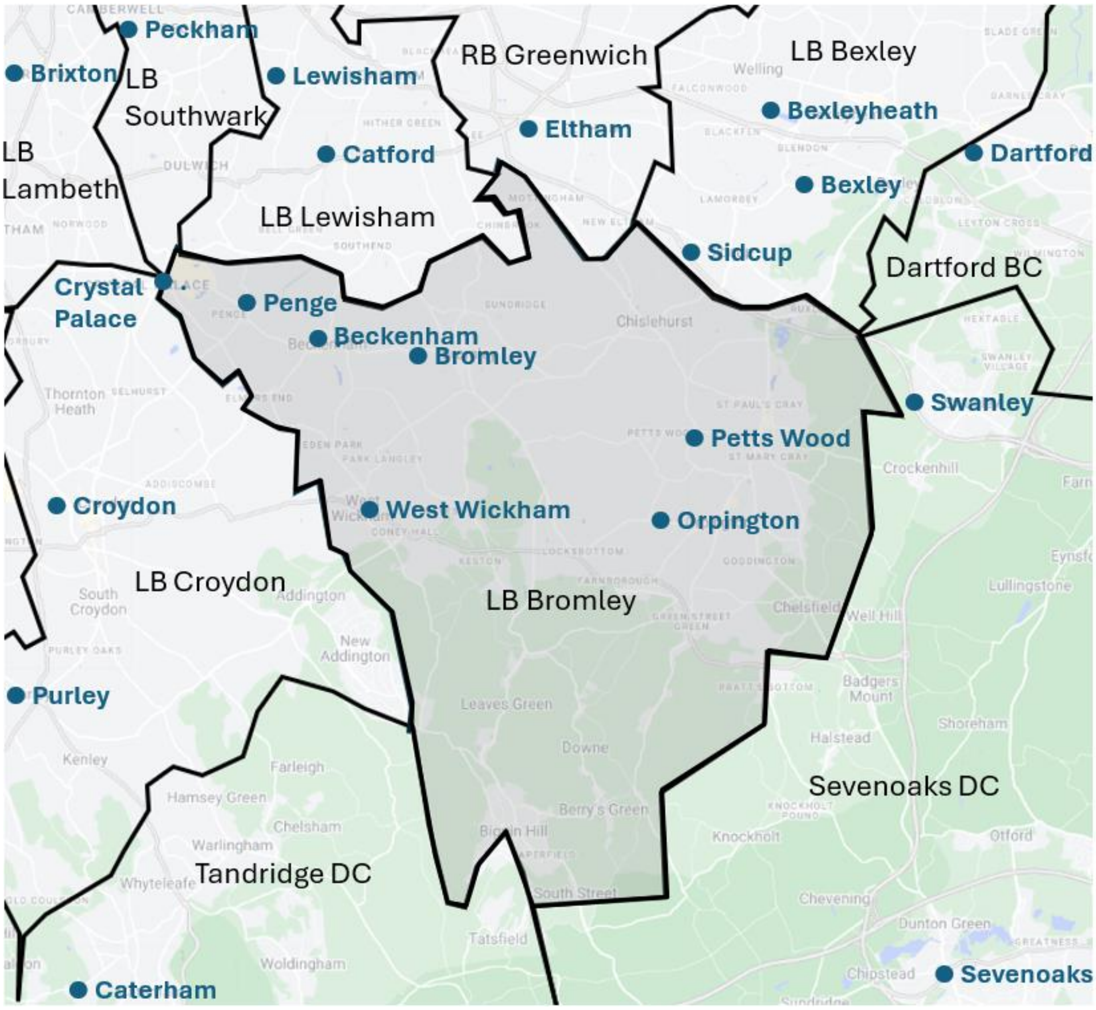


Image source: Firstplan

4.2 With this in mind, in this section we present a brief review of the retail and leisure offer in these surrounding Boroughs and centres. This provides helpful strategic context for later stages of the study, in terms of considering the extent to which future levels of expenditure retention in the Borough may change as a consequence of developments surrounding the authority area; and also for the Council to have regard to when planning future retail and leisure needs.

London Borough of Lewisham

Development plan position

4.3 Lewisham Council adopted their Local Plan in 2019 and are currently in the later stages of producing a new local plan, having submitted their new local plan for examination to the Secretary of State in November 2023. The London Borough contains two ‘major’ centres; Lewisham and Catford, seven district centres, two out of centre retail parks and five neighbourhood plans. Lewisham town centre is found approximately 6 kilometres to the north of Bromley town centre.

Lewisham metropolitan town centre

4.4 Lewisham town centre is identified as a metropolitan centre in the London Plan and has seen significant levels of development come forward over the last 15 years. As a metropolitan town centre with an associated broad shopping offer (including a daily historic street market), the centre has the potential to influence the shopping patterns of residents within the northern part of LBB from where it is afforded relatively good accessibility, with direct bus connections from areas such as Crystal Palace, Penge and Beckenham for example.

4.5 The town centre currently has an offer which is geared towards the middle to lower end of the market. The town centre is anchored by reasonably large branches of Primark, H&M, Marks & Spencer and TK Maxx, although in each instance the footprint of these units is smaller than the operator’s equivalent in Bromley. There is also a covered shopping centre, the Lewisham Centre, anchored by a Sainsbury’s supermarket and including branches of retailers such as Clarks, WH Smith, Boots, Flying Tiger, JD and Starbucks. There are long-term plans for the redevelopment of the shopping centre, discussed further below. A key attractor to the centre is its daily street market, which takes up much of the pedestrianised area in the town centre, and is evidently a significant footfall attractor in its own right.

4.6 Whilst appearing to have a reasonable range of retail services, Lewisham has a noticeably limited food and beverage offer, with many restaurants (especially national operators) eschewing the centre in favour of other locations nearby such as Blackheath. The offer that is present is largely restricted to operators such as McDonalds, Burger King, and Wetherspoons, alongside a number of independent operators, with Lee High Road playing an important role as the focus of the centre’s independent retail and service offer. Lewisham also acts as important transport hub on account of its interchange between Southeastern rail services and the Docklands Light Railway.

Lewisham Gateway

4.7 The principal redevelopment scheme in the town centre is the Lewisham Gateway scheme, a high density mixed use redevelopment comprising a mix of retail, office, hotel, residential, education, health and leisure uses, associated infrastructure and improvements to the public transport interchange. The outline application[21] gained consent in 2009 which included the provision of up to 17,500 sq.m of office (Use Class B1)/education (Use Class D1) floorspace, up to 5,000 sq.m of leisure floorspace (Use Class D2), up to 3,000 sq.m of hotel floorspace (Use Class C1) and up to 500 sq.m of health floorspace (Use Class D1).

4.8 The largely-residential phase 1 of the development has been completed. Phase 2 of the redevelopment comprises 649 homes for rent, office and working spaces. Leisure facilities include a gym and a nine-screen multiplex cinema, in addition to 1,393 sq.m of bars and restaurant floorspace that will be located within a ‘night time quarter’. In terms of retail provision, 11,148 sq.m of floorspace is included within the phase 2, with initial pre-lets suggesting the development is attracting a upper-middle tier of occupier, with potential occupiers included Gail’s Bakery, hair salon Blue Tit, a Sainsbury’s Local and coffee shops Black Sheep and Nebula. The

[21] London Borough of Lewisham planning application ref. DC/06/062375/X

construction of phase 2 is nearly complete and is set to open later in 2024. The operator of the cinema is, however, currently unknown following the agreed operator, Empire Cinemas, entering administration late in 2023.

Lewisham Shopping Centre

4.9 A planning application (part full, part outline) to redevelop Lewisham Shopping Centre to provide a mixed-use scheme including residential units and the provision of new shopping centre was submitted in November 2024, and revised in April 2025[22]. Lewisham Shopping Centre is found centrally within the town centre and opened in 1977. A series of public consultations were held on the proposed scheme in 2023 by developers Landsec U+I who own and manage the site which detailed plans to redevelop the existing shopping centre into a mixed-use retail space, public meadow, music venue, cultural club and provide up to 1,700 homes. The proposed redevelopment seeks to provide a significant quantum of commercial floorspace, with much of the existing floorspace within the shopping centre being demolished under the proposals. There is also a strong emphasis on the provision of a significant quantum of green space as part of the development proposals.

4.10 Specifically, the April 2025 revisions to the application propose[23]:

- Up to 1,643 homes (C3)
- Up to 661 Student beds (Sui Generis)
- Co-living homes (Sui Generis) 445 beds
- Town centre uses 37,480sq.m, of which at least 18,740sqm will be retail uses and 2,000sqm will be community and cultural uses within a new shopping centre.
- At least 11,885sqm of open space, parkland and public realm
- A reduction in car parking spaces from 836 (including 28 blue badge parking bays) to 60 (all blue badge parking bays).
- 15 new tall buildings up to 35 storeys in height.

4.11 The application has, at the time of preparation of this report, only recently been submitted and therefore is undetermined at the time of preparation. However, if approved, it can be expected that the development will deliver an important enhancement in the physical appearance of Lewisham town centre, including the introduction of a further substantial new residential community to the centre building on the recent developments at Lewisham Gateway. If the development comes forward, it may have some influence over patterns of shopping and leisure visits for residents in northern parts of LBB which benefit from good levels of accessibility to Lewisham town centre. It is recommended that this is monitored once further details about the nature and type of town centre floorspace which are expected to come forward are confirmed.

Lewisham Town Centre improvements

4.12 In 2023, Lewisham Council received £24 million in funding from the Government's Levelling Up Fund to deliver improvements to Lewisham town centre, including the renovation of Lewisham Library to create a new cultural and business hub, upgrading to the outdoor market including new stalls and a permanent green canopy, tree planting and the refurbishment of the Grade II listed Clock Tower. Regarding the High Street, new pedestrian crossings and cycling infrastructure will be provided, along with additional green spaces to improve the quality of the street scene. Lewisham Council undertook a period of public consultation on these proposals, which are expected to be implemented in the short to medium term.

[22] London Borough of Lewisham planning application ref DC/24/137871
[23] Schedule of uses taken from Planning Statement submitted under DC/24/137871

Other planned developments in London Borough of Lewisham

Bell Green Retail Park

4.13 Bell Green Retail Park is an out-of-centre shopping park located approximately four kilometres to the north of Bromley town centre. Currently the retail park contains a number of large format retail warehouses including stores operated by Aldi, Pets at Home, Next, Currys and B&Q, whilst a large Sainsbury's store is found to the south but is not included within the retail park. The Regulation 19 Submission Lewisham Plan (2023) sets out that the retail park is allocated for redevelopment to provide up to 1,831 homes, 3,740 sqm of employment floorspace and 14,961sqm of main town centre floorspace.

4.14 The existing Sainsbury's store found to the south is not included within the allocation, however the store and the wider area is included within the Bell Green and Lower Sydenham Strategic Area for Regeneration which proposes a comprehensive redevelopment to provide a residential-led mixed-use quarter that is supported by a new local centre. The Council intends to produce a Supplementary Planning Document and/or Masterplan for the scheme which is yet to be published.

4.15 Adjacent to the retail park lies the former Bell Green Gasworks which has been subject to a planning application for mixed use, residential led redevelopment comprising 263 residential units and 780 sq.m of flexible retail and workspace at ground floor level. The application[24] was submitted in December 2023 and is yet to be determined.

Catford

4.16 Catford town centre is located approximately 5 kilometres to the north of Bromley town centre and is easily accessible by residents living in the north of the Borough, including strong public transport links along the London Road / Bromley Road corridor. The retail offer of the town centre is largely limited to day-to-day shopping, including a large (albeit dated) Tesco supermarket. The leisure offer of the centre has been enhanced in recent years through the opening of an independent cinema and foodhall, Catford Mews, developed by the Really Local Group. The Broadway Theatre has also been the subject of a significant internal refurbishment led by Lewisham Council, reopening in February 2023 having been closed since the start of the Covid-19 pandemic.

4.17 It has been proposed by Transport for London (TfL) to realign the A205 South Circular Road which runs through the centre of Catford. TfL considers that these changes would provide the opportunity to create new public space and make other improvements within Catford Town Centre including new and improved pedestrian crossings and segregated cycle lane. Overall, the proposals should see Catford town centre become a more attractive and pedestrian-friendly location. The project is set to start in 2025 and will take two years to complete.

London Borough of Croydon

Development plan position

4.18 The London Borough of Croydon is found towards the western section of LBB. The current adopted plan consists of the Croydon Plan that was adopted in 2018. Croydon Council are carrying out a review of the current Local Plan and submitted a revised Local Plan for examination in November 2024.

Crystal Palace

4.19 As set out in Section 2, parts of Crystal Palace district centre also fall within LB Croydon and LB Lambeth, with the boundary of LB Southwark a short distance to the north of the centre. The adopted Local Plan defines Crystal Palace as a 'district' centre along with Addiscombe, Coulsdon, New Addington, Norbury, Purley,

[24] London Borough of Lewisham planning application ref. DC/23/133854

Selsdon, South Norwood and Thornton Heath. Croydon town centre, as a metropolitan town centre, is the highest-order centre in the Borough. Table 11.7 of the Local Plan identifies a number of redevelopment opportunities in the vicinity of the LB Croydon part of the district centre, the location of which is shown visually on **Figure 2.2.**

- **Site allocation ref. 28 'Bowyers Yard, Bedwardine Road'** is allocated to provide a cultural and creative enterprise centre. The site contains a number of storage buildings and is currently in use as a market that sells a range of products including vinyl, vintage clothes, antiques and books. The site is not subject to any live planning applications or gained permission for redevelopment and remains allocated for the same proposed uses in the emerging Proposed Submission Draft of the Croydon Local Plan (2024).

- **Site allocation ref. 80 'Victoria Place'** is allocated for mixed use redevelopment that will comprise ground floor retail, restaurant and studio space with hotel, office and residential uses on other floors. The site accommodates a series of workshops and gained permission[25] in 2015 for redevelopment for a mixed use scheme which is in accordance with the site allocation. The scheme has not been built out, but the original permission has been subject to numerous non material amendments as recently as 2023, indicating that the approved development will come forward in the near future. The allocation attached to the site has not been continued in the emerging local plan.

- Norwood Heights Shopping Centre is located on Westow Street and contains a range of retailers including Poundland, Sainsbury's supermarket and a number of independent outlets. The shopping centre and surrounding land including a community centre to the south is allocated **(ref.357)** for redevelopment to provide a mixed use scheme comprising retail, replacement community use and residential. The site has not been subject to any planning applications for comprehensive redevelopment and is allocated for main town centre uses with residential and/or office in the emerging local plan.

Figure 4.2 LB Croydon site allocations for Crystal Palace district centre

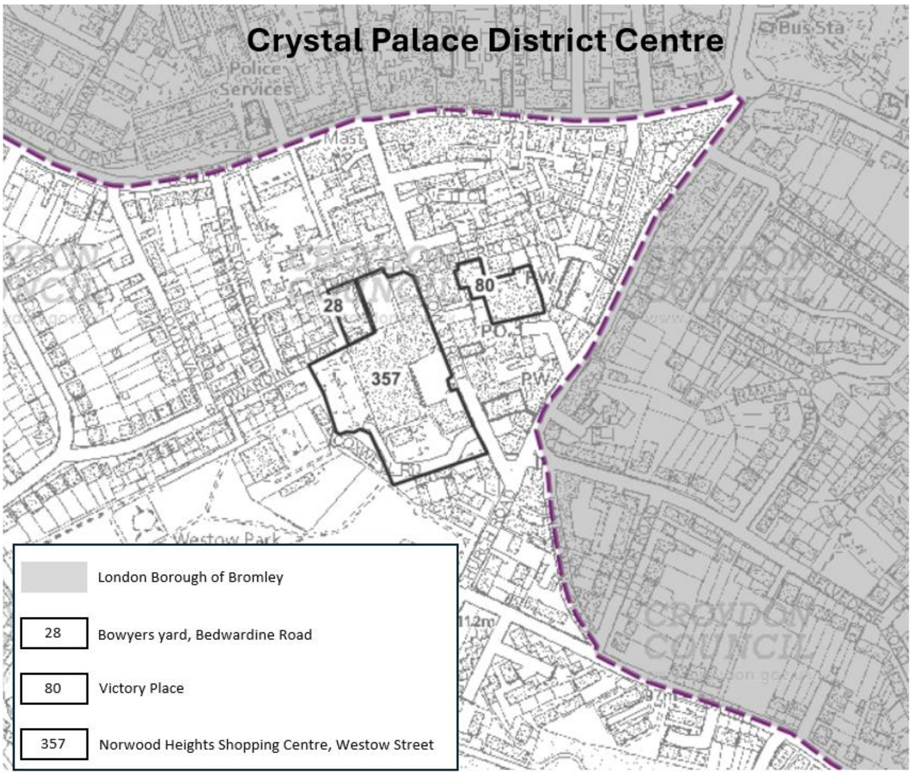


Image source: Firstplan annotation of LB Croydon Local Plan proposals map

[25] LB Croydon ref 15/02658/P

Croydon metropolitan town centre

4.20 Croydon town centre is located to the west of LBB and, like Bromley, is designated as a metropolitan town centre in the London Plan. Croydon town centre benefits from easy accessibility on the western side of the LBB, particularly from Crystal Palace, Penge and West Wickham, the latter of which is directly connected to Croydon Town Centre via the A232 Addiscombe Road/ Wickham Road. The town centre is currently seeing significant investment particularly in respect of the introduction of new high-density residential and commercial development on the eastern side of the centre, in the vicinity of East Croydon rail station.

4.21 In terms of its shopping offer, there has been a degree of stagnation in recent years aligned with the uncertainty over the long-term plans for the two covered shopping centres, and the retail offer of the centre accordingly could be considered to be relatively limited for a metropolitan town centre. The centre includes a large M&S store (North End / Whitgift Centre) and House of Fraser (Centrale Shopping Centre), Primark (North End), and a Next Outlet store, alongside more day-to-day comparison goods shopping and retail and leisure services. The town centre also faces significant competition from the well-established retail warehouse offer to the west of the town centre along the Purley Way corridor, which is discussed separately below.

Whitgift and Centrale Shopping Centres

4.22 Historically the shopping offer in the town centre has been orientated around the Whitgift and Centrale Shopping Centres. Both shopping centres are dated in appearance, especially the Whitgift Shopping Centre which opened in 1980. Both centres have been the subject of long-delayed redevelopment, initially proposed in 2012. The development was expected to come forward as a joint venture between shopping centre developers Westfield and Hammerson, although recently Hammerson’s 50% stake in the development has been acquired by Westfield, now known as Unibail-Rodamco-Westfield (URW).

4.23 In November 2024, URW began consultation on a ‘Masterplan Framework’ for the sites under its ownership and the immediate surrounding area, known as the North End Quarter in the emerging Croydon Local Plan. Allies and Morrison has been appointed as the lead architect to develop the masterplan scheme. Whilst retail will continue to form an important component of the scheme, it appears the focus will be on providing new residential development (up to 3,000 new homes), as well as community and workspace uses. It is understood the initial proposals seek between 700,000 sq.ft and 1m sq.ft of flexible retail and related uses, which will mark a significant reduction from the estimated 1.9m sq.ft which is current located on the site. The exact scope of future plans is likely to be subject to further refinement following the consultation and, on this basis, LBB should seek to monitor the progress of the development.

Other developments in Croydon town centre

4.24 Other development coming forward within and on the edge of Croydon town centre are residential-led, with many including an element of commercial / flexible floorspace. The Ruskin Square development adjacent to East Croydon station is the largest of these in terms of new floorspace. It would largely be expected that this floorspace would cater towards meeting commuter and new local residents’ shopping needs rather than providing ‘destination’ shopping opportunities which may influence spending of residents in LBB, but nevertheless as some of these developments remain at an early stage this should be monitored in future updates to this study. The key developments include:

- **Ruskin Square:** A key redevelopment scheme that first gained consent for 2012[26] which includes the development of five buildings to provide a maximum of 550 residential buildings, the erection of another five buildings to provide 88,855 sq.m of office space with 10,900 sq.m of retail floorspace at ground floor level.

[26] London Borough of Croydon planning application ref. 11/00631/P

The site has since been built out and is operational. Occupants of the scheme include Amazon Fresh with the rest of the units yet to be occupied.

- **Beamhouse Yard**: In 2018, Croydon Council granted consent[27] for the demolition of a vacant commercial building at 5-9 Surrey Street within the southern section of the town centre, to provide a mixed-use scheme referred to as 'Beamhouse Yard'. The 8-storey scheme will provide 55 new homes along with flexible Class E/D uses on at ground level / lower ground level, to provide community events spaces including events for open mic nights, poetry and spoken word, comedy, cabaret, fashion launch nights, film, yoga and fitness event. The development is currently under construction.
- **Morello Quarter:** Approximately 300 metres to the east of Croydon town centre, near East Croydon Railway Sation, consent was granted in May 2019[28] for the erection of two 25 storey buildings in addition to a single building ranging 5 to 9 storeys. The scheme referred to as 'Morello Quarter' which will provide 455 residential units, at ground floor and first floor level a flexible mixture of commercial, retail and community floorspace will be provided, comprising a total of 2,078 sq.m of floorspace.

Purley Way

4.25 As noted above there is a significant concentration of retail warehousing extending westwards from Croydon town centre along Purley Way. This concentration of retail activity is long established and is accessible from residents in LBB, particularly to the west of the Borough, via the A232 which runs along the southern edge of Croydon town centre and then meets Purley Way at Waddon. The key attractor in respect of the retail offer in this location can be expected to be a large branch of IKEA. The remaining retail offer comprises a mixture of bulky goods operators such as Furniture Village, Currys, SCS and Oak Furnitureland, and 'high street' retailers such as TK Maxx and Sports Direct. There is also a large Sainsbury's on the eastern side of Purley Way.

4.26 As set out in the emerging Proposed Submission Draft of the Croydon Local Plan (2024), the area is earmarked for significant redevelopment; set to deliver '6,300 new homes alongside a substantially reconfigured set of local centres and an improved set of green spaces and active travel options'. Purley Way is designated as Transformation Area in the emerging plan in which five new local centres are set to be delivered that will 'provide a stronger structure and sense of place for the area'. This can be considered to reflect a wider trend across the country seen in recent years to intensify development on retail park sites, which can often be strategically well located but offer a very low density form of development. As per the draft Purley Way Masterplan SPD (2021), the Transformation Area will deliver an additional 105,000 sq.m of employment floorspace through the intensification of industrial space as well as 40,500 sqm of new public open space.

4.27 The Purley Way Transformation Area includes a series of mixed-use site allocations that will impact current retail provision in the locality. Whilst the existing Ikea store is set to be retained, the Morrisons supermarket and the large Sainsburys Superstore are allocated to be demolished to make way for separate mixed-use developments that will provide a mixture of residential, retail, commercial and community uses, although we would anticipate that on many of these sites reprovision of retail floorspace (particularly the foodstores) would be expected to form part of wider proposals.

4.28 In the meantime, the site continues to be subject of activity for new retail and related uses. Planning permission was granted in 2019[29] for a mixed-use development on land to the south of the Currys unit / north of the Mill Lane junction, comprising the erection of three units providing 4,116 sq.m of floorspace for retail use (Use Class A1) and 232 sq.m for flexible retail or restaurant use. The 2.74ha site is made up of two parcels of land, one which formerly accommodated a John Lewis at Home retail store and the other comprising adjacent surface level car parking. The site has since been built out, with the new units occupied by Aldi, Smyths Toys and

[27] London Borough of Croydon planning application ref. 18/01211/FUL
[28] London Borough of Croydon planning application ref. 17/05046/FUL
[29] London Borough of Croydon planning application ref. 18/02908/FUL

Starbucks, and the former John Lewis at Home store has been reconfigured as a full-line Marks & Spencer store.

London Borough of Bexley

Development plan position

4.29 The London Borough of Bexley is located to the north-east of Bromley and the adopted Development Plan comprises the Bexley Local Plan (2023). The Borough contains Bexleyheath, a designated major centre as well five district centres, with Bexleyheath town centre located approximately 10km to the north-east of Bromley town centre. Sidcup is designated as a district centre as per the Bexley Local Plan (2023) and is located within 800m of boundary of LBB to south. This centre contains both a Morrisons supermarket and a Little Waitrose and is considered that the district centre has the potential to influence shopping patterns of nearby residents within LBB.

Bexleyheath

4.30 Although LB Bexley borders LBB to the north-east, its highest order town centre Bexleyheath is located some distance away in terms of ease access from residents in LBB. Bexleyheath is a major town centre as designated within the Bexley Local Plan (2023). Consent was granted in 2018[30] to demolish the Former Bexley Council offices located to the east of the centre to be replaced by a mixed-use redevelopment referred to as 'Eastside Quarter' comprising 518 residential apartments, 3,150 sq.m of flexible commercial floorspace including retail, business and leisure uses. The scheme has been completed, with a Sports Direct store is located at ground floor level.

Sidcup

4.31 Sidcup is located to the south of LB Bexley and is designated as a district centre in accordance with the Bexley Local Plan. In October 2019 consent 31 was granted for a mixed-use development containing a 3-screen cinema, a studio, a library, a café and a bar and 9 residential flats on 4 floors. This scheme has since been built out and opened in June 2023. The scheme provides a new leisure destination for residents on the eastern side of the Borough, including residents in Chislehurst and the northern part of Orpington who are well placed to access the mixed-use venue.

Dartford Borough

Development plan position

4.32 Dartford Borough is located towards east of LBB, sandwiched between LB Bexley to the north and Sevenoaks District to the south. The Development Plan for Dartford consists of The Dartford Plan to 2037 (2024) which replaced the Core Strategy (2011) and the Development Policies Plan (2017) when the document was adopted in May 2024.

Dartford

4.33 Dartford town centre is designated as a town centre within The Dartford Plan to 2037 (2024) and has been focus of a number of regeneration proposals in recent years, although development has been slow to come forward. However, in 2021 planning permission[32] was granted for the redevelopment of a derelict brownfield in the town centre comprising 23 apartments and 5 retail units at ground level.

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[30] London Borough of Bexley planning application ref. 17/02745/FULM
[31] London Borough of Bexley planning application ref. 19/01372/FULM
[32] Dartford Borough planning application ref. 20/00426/FUL

Dartford town centre

Westgate Site

4.34 A key regeneration that has been proposed within Dartford town centre is the redevelopment of a derelict brownfield site known as Westgate that was allocated in the now superseded Dartford Core Strategy (2011) for a mixed use scheme. The site gained planning permission in 2022[33] for a mixed use development comprising flexible commercial floorspace, a multiscreen cinema, hotel, health and wellbeing centre and 120 residential apartments. It is understood that due to viability challenges, the development will not be progressing in the form for which planning permission has been granted (although we would note that this consent remains extant and could be implemented). Instead, it is understood that Dartford Borough Council are now seeking to bring the site forward for a residential-led scheme through acquisition of the site from Homes England, and the Council has agreed internal funding to proceed with this.

Lowfield Road Site

4.35 Another key development within Dartford town centre comprising a mixed use development situated at Lowfield Road. The scheme gained permission for 556 residential dwellings as well flexible ground floor commercial in 2017[34]. The site is to be constructed in a series of three phases, with the first phase under construction.

Bluewater

4.36 Dartford Borough also contains Bluewater Shopping Centre, a regional shopping destination which is located approximately 18 kilometres to the east of Bromley Town Centre. The Council's previous retail needs study[35] identified Bluewater as playing a significant role over non-food shopping patterns, particularly for residents in the east and south of LBB. The shopping centre contains a total of 155,700 sqm of retail floorspace.

4.37 Bluewater, by virtue of its location off the A2 / M25, is an accessible (by car) shopping and leisure destination. The centre is almost entirely occupied by national and international retail brands and is anchored by three large-format department stores — John Lewis & Partners, Marks & Spencer and House of Fraser. The rest of the retail offer is fashion retail-led, and whilst there is a reasonable degree of overlap with the offer of Bromley in this respect, some retailers have larger format stores at Bluewater. Key fashion retailers present at Bluewater include Uniqlo, Primark, Urban Outfitters, Zara, H&M, Mango, Next, Flannels, and more premium outlets such as Hugo Boss, Hobbs, LK Bennett, Ace & Tate, The North Face, Sweaty Betty and Whistles. Bluewater is served by large areas of dedicated surfacer car parking providing easy access to the stores and outlets within the centre.

4.38 There is an extensive food & beverage offer sitting alongside the retail operators; again this is largely accounted for by national and international operators such as Starbucks, Costa, Pret, Joe & The Juice, Pizza Express (two branches), Nando's (two branches), Bills, McDonalds and Burger King. Planning permission was granted in 2017[9] to extend the west village section of the shopping centre including an activity centre which is occupied Gravity, a nationally operated entertainment venue provider comprising climbing walls, trampolines, and party rooms. The proposal also included the provision of 31,668 sq.m of retail floorspace, including the reconfiguration of 1,868 sq. m of existing retail floorspace. The leisure offer of Bluewater also includes a Showcase Cinema de Lux multi-screen cinema and an adventure park.

Sevenoaks District

Development plan position

[33] Dartford Borough planning application ref.20/0040/FUL
[34] Dartford Borough planning application ref. DA/16/01919/FUL
[35] Dartford and Ebbsfleet Retail and Leisure Study (2021)

4.39 Sevenoaks borders LBB to the south-east, along its rural boundary. The current Development Plan comprises the Core Strategy (2011) and the Allocations and Development Management Plan (2015). Sevenoaks District Council are in the process of developing a new local plan which is expected to be submitted for examination later in 2024. Sevenoaks town is designated as a Principal Town Centre within the Core Strategy (2011), the wider District contains three further town centres - namely Swanley, Edenbridge and Westerham, in addition to a number of Local Service Centres.

Swanley

4.40 Swanley town centre is in close proximity to the eastern boundary of LBB and its proximity means it has scope to exert a degree of influence over shopping patterns of residents in eastern parts of the Borough. Swanley is a major centre as designated within the Sevenoaks Local Plan. Its retail offer is focussed around the Swanley Centre, a purpose-built open air shopping centre set around a pedestrianised square. The centre is anchored by a large Asda foodstore with the remainder of its retail offer focused on day to day retail and services e.g. Iceland, Savers, Poundland and Holland & Barrett.

4.41 The former owners of Swanley Centre, U+I, lodged a planning application in 2017[36] to demolish the existing centre and replace it with seven tower blocks ranging from three to 11 stories high providing 303 new homes and 4,318 square metres of commercial and retail space; the application was refused permission. In April 2018 U+I appealed against the decision to the Government's Planning Inspector who overturned the decision in 2019 [37]. It is understood that U+I have subsequently sold their interest in the Swanley Centre to Evolve Estates, who are understood to be focussing a more asset management-based approach to the centre through seeking to attract new tenants and increase footfall.

Sevenoaks

4.42 Sevenoaks is an attractive market town and has a retail offer combining a mixture of day to day and more upmarket retail and food & beverage operators. The centre is anchored at its northern end by a M&S store, and to its southern end by a large Waitrose store. Other retailers in the centre include Poundland, Space NK, Gail's, Hotel Chocolat and Oliver Bonas. The centre also has good representation from mid-market national restaurant operators such as Cote, Nando's, Zizzi, Wagamama and similar. The former Tesco Metro store on High Street is currently being redeveloped to introduce new residential accommodation into the centre alongside ground floor commercial floorspace. The presence of the National Trust's Knole House and Gardens to the east of the town centre is a further asset to the offer of the town.

4.43 Sevenoaks Borough Council consulted on a Regulation 18 draft of their new Local Plan in May 2024. This identifies a development opportunity on council-owned land east of Sevenoaks High Street, which is expected to make provision for a new hotel, leisure centre, library together with a small amount of retail / food & beverage floorspace and new residential units.

Royal Borough of Greenwich

Development plan position

4.44 The Royal Borough of Greenwich is located to the north and east of the study area and contains Woolwich and Eltham which are both designated as major centres. Eltham sits in close proximity to the north-eastern boundary of the Borough and is the nearest large town centre for residents in the Mottingham area. The adopted Development Plan comprises the Greenwich Core Strategy (2014). Greenwich Council are in the process of adopting a new local plan, the most recent stage comprised the Regulation 18 Consultation that was held

[36] Sevenoaks District planning application ref.17/02279/FUL
[37] Planning appeal ref. APP/G2245/W/18/3200270

between July-September 2023. Submission of the draft local plan to the Secretary of State for examination is expected to occur in Autumn 2024.

Eltham

4.45 Eltham is designated as a major centre in accordance with the Greenwich Core Strategy (2014). Towards the east of town centre, Lidl are proposing to redevelop the Mecca Bingo Hall along Eltham Hill (A210), to provide a mixed use scheme comprising a 2879 sq.m Lidl store at ground level and 71 residential on the upper floors. An application for the scheme is yet to be submitted; it is understood that Lidl is attempting to sell the freehold of the site to a developer, and then, subject to planning permission, Lidl would lease back the store from the developer[38]. The proximity of this location to residents in the Mottingham offers scope to influence convenience shopping patterns in a localised catchment.

4.46 Elsewhere, Eltham's retail offer is reasonably strong in the context of the role and function of the centre; anchor stores are Marks & Spencer, TK Maxx (who took over a former Debenhams) and Sainsbury's, supported by a reasonable range of day-to-day retailers and services. A new leisure complex opened at the eastern end of the High Street in 2019, including a six-screen Vue cinema and Nando's and Pizza Express restaurants.

London Borough of Southwark

4.47 The London Borough of Southwark is located to the northwest of LBB, abutting LBB at Crystal Place (although the administrative boundary of the authority does not cover any parts of the district centre – see **Figure 4.2**). Southwark contains three major centres including Elephant and Castle (including Walworth Road), Peckham and Canada Water as defined by the Southwark Plan that was adopted in 2022 and covers the period 2019-2036. The Plan contains an 'Area Vision' for the Crystal Palace and Gipsy Hill area, and whilst this does not cover the district centre itself, it requires any development in the Crystal Palace and Gipsy Hill area to 'preserve and enhance the character of Crystal Palace and Gipsy Hill', 'complement the shopping offer of Upper Norwood town centre' and 'be mindful of any cross-boundary issues with neighbouring Boroughs'. In terms of growth opportunities, the Plan comments that 'Whilst development opportunities in Crystal Palace and Gipsy Hill are relatively limited, the area has the potential to contribute towards meeting Southwark's housing need. Most new homes will be built on infill sites.'

4.48 The town centres in LB Southwark fulfil a role and function which is relatively localised and would not be expected to act as significant attractors in their own right in terms of their retail offer from residents of LBB — although Peckham also has a significant and growing evening and night-time economy and is one of the key destinations in South London in this respect. Peckham is also directly accessible from LBB via Thameslink rail connections, and buses from north-western parts of the Borough such as Crystal Palace and Penge. A key regeneration scheme within the Borough that is currently being built out is the redevelopment of Cananda Water which is set to provide 6,000 new homes as well as retail and office space.

London Borough of Lambeth

4.49 The London Borough of Lambeth is located to the west of the study area and contains two major centres in the form of Brixton and Streatham, both of which are accessible by bus from Crystal Palace but have limited connections with the rest of the Borough. The Development Plan consists of the Lambeth Local Plan (2021). Lambeth Council conducted a consultation on its Regulation 19 Site Allocations Development Plan Document Proposed (Submission Version) between June and August 2024, with the document subsequently submitted for Examination in October 2024.

[38] https://www.thegrocer.co.uk/lidl/lidl-planning-31000-sq-ft-store-and-71-homes-in-latest-mixed-use-london-scheme/688249.article

4.50 The borough is also supported by several district centres and local centres, including a district centre on the northern side of Westow Hill, Crystal Palace which abuts the Crystal Palace district centre in LBB. Collectively, the district centre allocations in LB Lambeth, LB Croydon and LB Bromley thus forms a singular district centre at Crystal Palace in spatial terms, with each authority broadly responsible for one street within the triangular-shaped district centre.

Tandridge District

4.51 Tandridge District is found towards the south of the study area. Tandridge District contains Oxted and Caterham which are both designated as town centres and have a retail offer which is considered likely to predominantly cater towards a fairly local catchment to the respective towns rather than acting as significant retail or leisure destinations in their own right. The adopted Development Plan for Tandridge consists of the Core Strategy (2013). Tandridge District Council submitted a submission local plan for examination in 2019, however it was announced in March 2024 that the presiding Planning Inspector concluded that the plan should not be adopted due to issues of soundness.

SECTION 5 | INTRODUCTION TO TOWN CENTRE HEALTH CHECKS & BROMLEY METROPOLITAN TOWN CENTRE

Introduction to town centre health checks

5.1 The following sections of the report set out assessments of the performance of the network of centres in LBB against the 'town centre health' indicators set out at paragraph 006 of the 'Town Centres & Retail' Planning Practice Guidance ('PPG') (as amended, 2020). The town centre health check indicators have expanded in range and scope in recent years, with additional indicators introduced into the PPG in an update published in 2020, such as the balance between independent and multiple stores; evidence of barriers to business expansion; and opening hours / extent of an evening and night time economy offer.

5.2 The 'health check' indicators set out in the Town Centres & Retail PPG are as follows :

- diversity of uses
- proportion of vacant street level property
- commercial yields on non-domestic property
- customers' experience and behaviour
- retailer representation and intentions to change representation(*)
- commercial rents(**)
- pedestrian flows
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements
- perception of safety and occurrence of crime
- state of town centre environmental quality
- balance between independent and multiple stores(***)
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding*
- opening hours/availability/extent to which there is an evening and night time economy offer.

5.3 To assess these, our analysis draws on:

- published industry data such as Goad Plans of town centre uses provided by Experian
- 'Category Reports' of town centre diversity also provided by Experian;
- town centre monitoring data provided by LBB, particularly in respect of footfall;
- discussions with key stakeholders undertaken as part of the study preparation, details of which have been previously set out in this report;
- commercial market analysis provided by our sub-consultants Urbá, whose property market analysis is appended to this main report;
- the findings of the household survey undertaken in support of this study, which asked questions on local residents' usage of town centres and how the town centres could best respond to people's changing shopping patterns.

- other relevant information by third parties and desktop research which is available within the public domain;
- observations made during site visits to the town centres between January and June 2024.

5.4 The scale of health checks undertaken is proportionate to the nature and role of the centre, and, aligned to this, the amount of information available in respect of the above indicators that is available within the public domain. The health checks are presented over **Sections 5 to 9** of this report, as follows:

Section 5 (this section)	Metropolitan centre	Bromley town centre
Section 6	Major town centre	Orpington town centre
Section 7	District centres	Beckenham, Crystal Palace, Penge,
Section 8	District centres	Petts Wood, West Wickham
Section 9	Local centres	Biggin Hill, Chislehurst, Hayes, Locksbottom, Mottingham
Section 10	Neighbourhood Parades	All 67 neighbourhood parades as set out in Appendix 10 of the Bromley Local Plan (2019) (Desktop assessment)

5.5 In the remainder of this section we therefore progress to present a health check assessment of Bromley metropolitan town centre[39].

Bromley metropolitan centre health check

5.6 As a metropolitan town centre in the London Plan and the Local Plan, Bromley town centre is the highest-order and largest retail centre in LBB. The centre has a strong comparison goods offer which has largely remained intact following the changes in shopping patterns over recent years as identified in previous sections of this study — although Bromley has not remained immune to being affected by some of the higher-profile casualties seen in the retail sector in recent years. The focus of the comparison goods offer is the pedestrianised section of the High Street, anchored by a large Primark store to its northern end. A large, enclosed shopping centre – The Glades – sits adjacent to the High Street and offers a strong retail mix although its historic 'anchor' unit, formerly occupied by Debenhams, remains vacant.

5.7 Surrounding streets are more leisure-focussed in nature, with a range of coffee shops and food-to-go stores becoming more prevalent around the southern part of the town centre in proximity to the busy Bromley South railway station, with an established office cluster also in this part of the town centre. Whilst Bromley provides a diverse range of comparison goods outlets, the town centre is also supported by four large supermarkets - Sainsbury's, Marks & Spencer, Lidl and Waitrose, distributed across the centre.

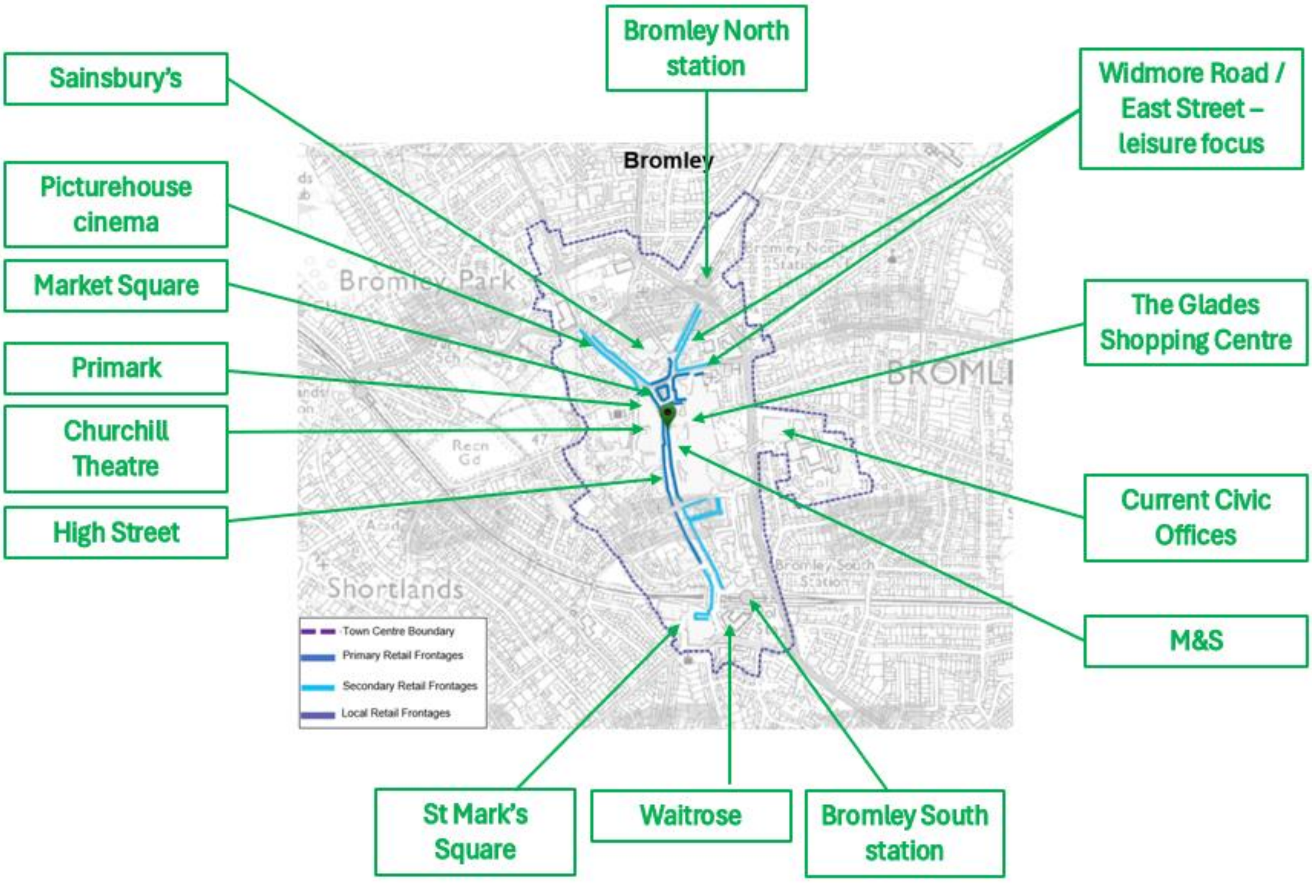
Current policy boundaries

5.8 The town centre boundary (as defined by the Local Plan) covers a wide area, stretching from Bromley North Railway Station and the magistrates court at the northern end of the town centre; the civic centre complex to the east; the Waitrose store and new St Mark's Square leisure development to the south and Bromley Park to the west. The Local Plan defines primary frontages are found along the entirety of Market Square, the central and part of the southern section of the High Street, in addition to small sections of Widmore Road, East Street

[39] Hereafter referred to as 'Bromley town centre'

and Church Road. Secondary frontages are found in the north-west section of the High Street, the majority of East Street, the northern side of Widmore Road, the pedestrian walkway along The Mall and the parts of the southern section of the High Street. There are key 'attractors' located throughout the town centre, as the annotated Local Plan Proposals Map extract at **Figure 5.1** shows.

Figure 5.1 Local Plan town centre boundary & retail frontages in Bromley town centre, annotated with key developments / premises



Source: LBB Local Plan Proposals Map, with Firstplan annotations

Diversity of Uses

5.9 The diversity of uses of a town/city centre is a critical indication of its overall vitality and viability. A diverse town centre with a broad range of retail (food and non-food), leisure and other complementary uses, which operate across different periods of the day, is critical in drawing in repeat footfall and spending, and encouraging dwell time. The most recent assessment of the diversity of uses of Bromley town centre is the Experian Goad Survey of the centre which was undertaken in June 2023. Firstplan undertook site visit to Bromley town centre in February 2024 to verify the Goad survey and any subsequent changes to retail and wider offer.

5.10 A summary of the diversity of uses shown in **Table 5.1**. It shows that the town centre contains 437 units in total, with retail (comparison and convenience goods) comprising 211 of these, totalling 48.2% of all units in the centre. Of these, convenience goods retailers occupy a total of 33 outlets, comprising 7.5% which is 2.6% below the UK average. Comparison goods outlets account for 178 units or 40.7%, which is significantly higher than the UK average of 33.5%.

Table 5.1 Diversity of uses in Bromley town centre (Experian Goad June 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	33	7.5	10.1	-2.6
Comparison	178	40.7	33.5	7.2
Services (Financial and business + leisure services)	162	37.0	39.8	-2.8
Vacant outlets + miscellaneous	63 (1 miscellaneous)	14.9	15.5	-0.6
TOTAL	**437**	100	100	-

Source: Experian Goad survey, June 2023

5.11 Given Bromley's role and function as a metropolitan town centre, a higher proportion of comparison goods representation relative to the UK average can be expected[40]. In terms of floorspace, comparison goods retailers represent 40.7% of the total, compared to the UK average of 33.5%, which is driven by a number of larger-format retail outlets found within the centre, such as Primark and Marks & Spencer. It should be noted that this figure does not account for a larger former Debenhams department store and a larger former Wilko store which are both currently vacant within the centre (discussed further below), and were this unit to the occupied the proportion of floorspace in comparison goods use would be expected to be higher.

5.12 The second most prevalent use in the town centre is the services sector which includes restaurants, cafes, fast food, hairdressing, beauty & health along with estate agents, bank and other financial services. Within this sector, restaurants, cafes and fast-food uses are the most common, comprising a total of 81 units which falls broadly in line with the UK average in percentage terms (-0.3%). Hairdressing, beauty & health account for 49 units which again falls broadly in line with the UK average (-2.1%). Banks & services occupy 13 units and estate agents & auctioneers account for 12 units and both fall within 1% of the UK average in percentage terms.

5.13 Bromley is well provided for in terms of convenience goods retailers, with four large foodstores found within the town centre, including Sainsbury's, Waitrose, Marks and Spencer and Lidl, whilst a Sainsbury's Local and Tesco Express are located towards the southern end of the High Street. The town centre is also supported smaller convenience stores such as Premier Express as well as number of independent outlets. A total of nine bakeries are found within the town centre but lacks the provision of a dedicated butcher.

5.14 In terms of other leisure uses, the town centre can be considered to be well-served, with the following uses present in the centre:

- A 9 screen **Vue multiplex cinema** is found within the recently-developed St Mark's Square mixed used development that is located in the south western part of the town centre. The development also contains a Travelodge hotel, a gym in addition to nine commercial units, which are occupied by restaurants such as Nando's and Pizza Express.
- **Bromley Picturehouse** is a six screen cinema (a conversion of a former Odeon) that is located in north western section of the High Street which also includes a bar and kitchen that provides a more upmarket 'boutique' cinema environment and arthouse film offering compared to the Vue[41].

[40] The changes in shopping patterns which have taken place over the last decade (and more) and in particular the growth in online shopping mean that many comparison goods retailers have a more limited requirement for physical store representation, and as such tend to focus operations on larger / 'higher order' centres such as Bromley which have a wide shopping catchment and a critical mass of similar retailers.
[41] During the preparation of this study, a commercial decision was made by Picturehouse to close its Bromley cinema, along with two others in London. Further discussion is provided in the commercial leisure section of this report (Section 14).

- **Churchill Theatre** is a 781 seat venue that is located centrally within the town centre and hosts a range of theatre productions and corporate functions and is also adjacent to Bromley Library.
- **East Street,** located within the northeastern section of the town centre, is the focus of the town centre's evening economy and contains a range of bars and restaurants, including O'Neills bar/pub, Aqua Bar & Grill, Cow & Pig restaurant and VuVu Nightclub. To the south of East Street lies Widmore Road which contains a number of national restaurant chains including Nando's, Franco Manca, Zizzi, Coco di Mama and Pizza Express.
- **The Pavilion** is a leisure and entertainment centre operated by MyTime Active that is attached to The Glades Shopping Centre, containing a gym, swimming pool, bowling alley and a children's soft play area.
- **The Mall** which is located adjacent to The Glades has historically been more of a 'secondary' shopping centre, historically anchored by a large branch of Argos before its relocation, is moving towards becoming more of a leisure-focussed destination, containing for example a recently opened Rhino Boulder rock climbing gym. The building has recently come under new ownership and it appears that the new owners are understood to be pursuing a more leisure-focussed offer in the centre.

Retailer Representation

5.15 The comparison goods retail offer is focussed on The Glades Shopping Centre and the adjacent pedestrianised section of High Street. The shopping centre opened in 1991 and contains 135 stores spread over two floors. The majority of the stores are occupied by national retailers such as H&M and, M&S and Apple (which can be considered the 'anchors' to the southern part of the centre); alongside Zara and a large branch of Boots (which can be considered the 'anchors' to the northern part of the centre). Other retailers present in The Glades include Flannels, New Look, River Island, Waterstones and HMV. The northern part of the centre also has a clutch of more premium clothing and homewares retailers such as The White Company, Oliver Bonas, Hobbs, Jo Malone, MAC, Space:NK and Whistles. The shopping centre also contains a number of coffee shops and restaurants including Wing Shack and Wagamama which are located on the eastern side of The Glades, facing Queens Gardens.

5.16 Bromley High Street runs adjacent to the western side of The Glades, and extends further north and south beyond this. It is pedestrianised along its central stretch. Two units within The Glades – M&S and H&M – also have entrances on the High Street, but the rest of the units do not. Retailers along the High Street include Holland and Barrett, Flying Tiger, WHSmith, JD Sports, Next, Foot Asylum, Clarks and Sports Direct amongst others. The pedestrianised section of High Street is bookended by a large Primark store to its northern end whilst moving south towards Bromley South station, a large TK Maxx store sits on the western side of the High Street. These two stores therefore represent the northern and southernmost key 'anchor' stores which can be considered to act as principle footfall drivers, with The Glades Shopping Centre and pedestrianised section of High Street forming the remainder of the core retail circuit. Overall the comparison goods retail offer of the centre can be considered strong, but it is significant to note that opening hours are generally curtailed to around 6pm with a small number of exceptions, and the Glades no longer offers extended hours shopping, having previously been open until 9pm every Thursday.

5.17 As mentioned above, the town centre contains four larger-format foodstores, a Waitrose supermarket is located to the south of the centre, M&S and Lidl are located centrally along the High Street and a Sainsbury's supermarket is located in the northern section of the town centre. The variety of supermarkets found within the town centre serves the needs of consumers across a range of demographics and act as key footfall generators. Bromley also contains a number of smaller-format convenience stores such as Tesco Express and Sainsbury's Local located within the southern section of the High Street, in addition to a Premier Express which situated on East Street.

5.18 In respect of the Waitrose store, it is noteworthy that a planning application has been submitted for the redevelopment to provide a mixed-use development that extends to 24 storeys, with a replacement Waitrose foodstore at ground floor level. A total of 350 residential rental apartments are planned for the remaining storeys which will be managed by the John Lewis Partnership. LBB granted a resolution to approve the Waitrose application at planning committee, subject to legal agreement and any direction by the Mayor of London.

5.19 In terms of its food and beverage offer, the centre contains a number of family dining restaurants including Pizza Express, Nando's, Franco Manca and Zizzi. National fast food restaurant chains include Domino's, Papa Johns, Subway, KFC, McDonalds, Burger King, Five Guys and Wingstop. Several nationally operated coffee shops are also found within the town centre including Black Sheep Coffee, Caffe Nero, Gail's Bakery, Costa Coffee, Pret a Manger and Starbucks. Caffe Nero and Starbucks operate across multiple locations.

Balance Between Multiple and Independent Stores

5.20 The Experian Goad survey of Bromley town centre (June 2023) identified 181 out of the 447 units were occupied by multiple retailers', equivalent to 41.4% of the total which is nearly double the UK average of 21.5%. This high representation is reflective of Bromley's position within the retail hierarchy, as a Metropolitan town centre; recent years have seen an increasing 'polarisation' of national retailers towards larger town centres, where they can easily serve a wider catchment, supported by an enhanced online presence.

5.21 The relative lack of independent retailers is highly noticeable within the primary shopping frontage in the town centre which is almost exclusively occupied by national retail operators. Notwithstanding this, the town centre still contains a good variety of independent operators including coffee shops such a Roadstar Specialty Coffee and the 1917 Chill Café, both of which are located in the north east section of the High Street, along East Street and Widmore Road. In addition, the centre contains a number of independently operated specialist grocers such as the Delicatess Eastern European Food & Drinks Store, Polo Market and Bromley International Centre which are all situated along the northwestern section of the High Street. Overall however, the independent retail and leisure sector in the town centre feels generally restricted to more peripheral parts of the town centre and, whilst it complements the wider retail offer, may not be of sufficient scale / critical mass to act as an attractor in its own right.

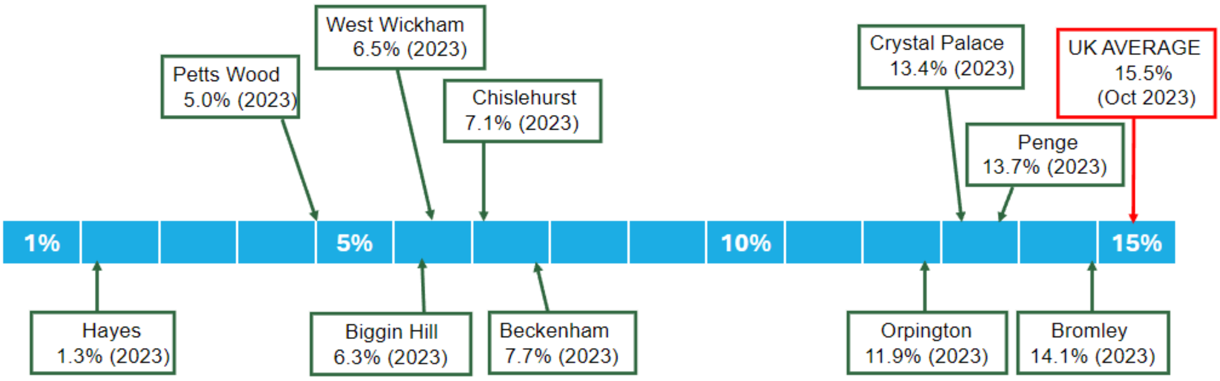
5.22 The pedestrianised section of the High Street contains market stalls that operate every Thursday, Friday and Saturday (known as the Charter Market) which sell a range of high-quality goods and farmers' produce including fruit, vegetables, flowers, jewellery and crafts, whilst the sale electronic goods are restricted. An annual Christmas market is also held in the central pedestrianised section of the High Street.

Vacant Street Level Property

5.23 Vacancy rates are a key indicator of the 'overall' health of a town centre, and a visually obvious indicator of where a centre may be struggling to offer positive trading conditions for its users. Vacancies can however also arise as a consequence of wider commercial considerations, such as when a national retailer enters administration or goes bankrupt and is forced to close some or all of its outlets.

5.24 Data on town centre vacancy is provided by Experian Goad in their annual category reports, and Figure 5.2 shows the vacancy rates identified for the town centres in LBB in the most recent publications for each centre. This is a useful benchmark for the network of centres in the Borough and should also be referred to in respect of the health check assessments of the remaining centres in the Borough set out in the following sections. For each centre we have also undertaken site visits and provided qualitative analysis on recent changes to vacancies in the centre.

Figure 5.2 Vacancy rate for centres within LBB



Experian Goad category reports for individual centres dated between February – October 2023

5.25 The analysis in **Figure 5.2** shows a general trend of larger, higher order centres such as Bromley and Orpington showing a higher rate of vacancy whereas the majority of smaller district centre have a vacancy rate below 10%., well below the current UK average. However both Crystal Palace and Penge district centres are identified as having relatively high levels of vacancy, which we discuss further in the respective health check assessments of these centres in following sections of this report.

5.26 As identified previously, at the time of the most recent Experian Goad survey, the vacancy rate in Bromley is 14.1%, which is 1.4 percentage points lower than the UK average indicating that the town centre is performing adequately. In terms of the locations of the vacant units, a cluster of vacant units was observed on the eastern side of High Street towards the southern end of the centre, stretching from the pedestrianised section southwards towards the large vacant Wilko unit (see below). A further concentration of vacant units was recorded in the northern section of the town centre, where the High Street continues onto Market Square.

5.27 Some larger units were also observed to be vacant within the town centre, including the former Debenhams department store which spans two floors within The Glades. In addition, the former Topshop store located within the central pedestrianised area of the High Street and the former Wilko store located towards the southern end of the High Street are both vacant. Whilst the former Topshop, Wilko and Debenhams stores are large units which are important facets of the overall retail offering within Bromley, it is pertinent to take into account that all of the aforementioned retailers went into administration and their closure is not a consequence of the viability and vitality of the town centre. The former TopShop unit is, we understand, an asset owned by LBB, and there are emerging proposals to repurpose this space as a library/community facility, which would provide a positive additional footfall generator.

5.28 Recently, The Glades has attracted a number of new lettings which are towards the upmarket / premium tier. The conversion of the former Town Hall building as a mixed-use development including co-working space is also a positive addition and adds to the diversification of the offer of the centre. Upon visiting the town centre in March 2024 the following units, identified as being recently vacant by Experian Goad surveys, have now been let:

- Exchequer House formerly known as Town Hall building on Widmore Road is being used as co-working space known as Clockwise;
- 95 High Street occupied by Black Sheep Coffee;
- 52 High Street is now in use as a dental practice;
- Unit 6, The Glades Shopping Centre is now occupied by Rituals (beauty and wellness products);
- Unit 222, The Glades Shopping Centre is now occupied by Space NK (beauty products);

- Unit 223, The Glades Shopping Centre is now occupied by Moda in Pelle (clothing);
- Unit 245, The Glades Shopping Centre is now occupied by Goldsmiths (jewellers);
- Unit 246, The Glades Shopping Centre is now occupied by Tag Heuer (jewellers).

5.29 Likewise, a number of stores that were occupied when the Goad data was collected are now vacant, including the following:

- Unit 4A The Mall is now vacant, having been formerly occupied by Sevenoaks Furniture;
- 44 High Street is now vacant, having been formerly occupied by Wilko (household goods). This is a large prominent vacant unit towards the southern end of the High Street, which occupies a considerable extent of frontage to the street;
- Unit 2 The Glades Shopping Centre is now vacant, having been formerly occupied by Kiko Health & Beauty;
- Units 16, The Glades Shopping Centre is now vacant, having been formerly occupied by Accessorize (clothing accessories).

5.30 An extent of 'churn' of units is part of the functioning of town centres at all levels of the retail hierarchy and therefore is not, in itself, a cause for concern. However, the vacancy rate in the centre does nevertheless remain relatively high (and is the highest in the Borough), and as such it is considered this indicator should continue to be carefully monitored by LBB moving forwards.

Customers views and behaviour

5.31 The household telephone survey undertaken in support of the study asked a series of questions about respondents' usage of the centres in LBB which they visit and use. These provide helpful insights into how residents use the different centres in the Borough, as well as asking what residents like about the centres they use. For this survey, we also asked, for residents who use Bromley and Orpington town centres, how they feel the respective centres need to change and evolve in order to remain vital and viable town centres in the future. Analysis of the responses for Bromley town centre is set out below, and for the remaining centres in the following sections of this study.

<u>Frequency of visit to Bromley town centre</u>

5.32 Respondents to the household survey were asked when they last visited Bromley town centre. 41.2% of respondents stated they had visited within the last month (and 17.3% stated that they had visited within the last week). 19.7% of respondents stated they had not visited in the last 12 months.

5.33 As later sections of this report discuss, the household survey area is split into zones to enable localised patterns of shopping and leisure visits to be captured. Bromley town centre sits in zone 1, and from this zone, 46.5% of respondents had visited within the last week, and 74.3% within the last month. This suggests that the town centre is doing a good job in pulling in frequent visits from its immediate catchment. In zone 2, which covers the Orpington / Petts Wood area, 27.7% of respondents had visited the town centre within the last week (52.5% within the last month) and in zone 3, which covers the Biggin Hill area, 38.6% of respondents had visited within the last week (64.0% within the last month).

<u>Main purpose of visit</u>

5.34 As highlighted above Bromley town centre has a strong comparison goods shopping offer, reflecting its role and function as a metropolitan town centre. This is reflected in the household survey results, which show that 37.9% of respondents stated that purchasing non-food shopping was the main purpose of their visit to the centre. 9.2% stated the main purpose of the visit to be food shopping, and 8.9% stated window shopping / browsing. Leisure-based reasons for visiting the town centre attract lower market shares.

5.35 For residents in zone 1 (which covers Bromley) it is interesting to note that the role of food shopping takes greater importance, accounting for 19.6% of responses from zone 1, with non-food shopping just 19.8%. Again, leisure uses do not feature prominently in the responses, but 8.9% stated their main reason for visit was for daytime leisure, e.g. visiting a cafe or restaurant.

Table 5.2 Main purpose of visit to Bromley town centre (household survey respondents)

Rank	Main purpose of visit — Bromley town centre	% of responses
1	Purchasing non-food shopping	37.9
2	Purchasing food shopping	9.2
3	Window shopping / browsing	8.9
4	Evening leisure activity e.g. visiting restaurants, pubs, bars	6.8
5	Daytime leisure activity, e.g. visiting cafes, restaurants	5.7

Source: household survey results

Linked trips

5.36 Respondents were also asked what other activities or services they used when visiting Bromley town centre. Here, the role of commercial leisure attracted higher levels of responses: 25.3% of respondents visit cafes/restaurants as a linked activity; 12.9% visit an evening economy use (pub/bar/restaurant), and 14.7% visit other leisure activities such as cinema or gym. Additionally, 20.7% of respondents undertake food shopping as a linked activity, and 19.6% undertake non-food shopping as a linked activity. 23.4% of respondents stated that they do not undertake any linked trips shopping.

What respondents like about Bromley town centre

5.37 Respondents were then asked what attributes of Bromley town centre they liked the most; a summary of these is provided in **Table 5.3** below. It can be seen that over 50% of respondents stated that what they liked most about the centre was the choice and range of shops, confirming the significance of the centre's retail offer in attracting footfall and spend to the centre. 25.3% stated that they liked the fact it was close to home.

5.38 A lot of positive responses related to the accessibility of the centre; 19.3% liked the accessibility of the centre by public transport, 14.1% stated they like the ease of accessibility by car; 9,9% stated it was easy to park; and 7.6% mentioned the fact that car parking in the centre was convenient. The environmental attributes of the centre also scored well — 17.7% of responses mentioned the cleanliness of the centre, 13.3% mentioned the environmental quality / attractiveness of the centre, and 14.4% mentioned the nice atmosphere of the centre.

5.39 31.2% of respondents stated that they like the choice of food & beverage options in the centre, and 17.0% mentioned the quality of the market in the centre. This confirms the importance of these supporting uses to the overall vitality and attractiveness of the centre.

What respondents dislike about Bromley town centre

5.40 Respondents were then asked what they disliked about Bromley town centre. Positively, 30.2% stated that there was 'nothing' they disliked about the centre, which is encouraging although it should be noted that other centres lower in the Borough's retail hierarchy score higher levels of satisfaction. The main thing which respondents stated they disliked was the number of empty shops (16.3% of responses), followed by concerns relating to car parking (13.1% considered car parking to be too expensive; 9.4% considered parking to be too expensive). 8.9% of respondents stated they did not think shops were open late enough in the centre.

Table 5.3 Likes and dislikes of Bromley town centre (Household survey respondents)

Rank	Attribute – most liked (Bromley)	% of responses	Attribute – most disliked (Bromley)	% of responses
1	Choice and range of shops	51.5%	Empty shops	16.3%
2	Choice of places to eat / drink (e.g. restaurants, cafes, pubs, etc.)	31.2%	Expensive car parking	13.1%
3	Close to home	25.3%	Not enough parking spaces	9.4%
4	Easily accessible by public transport	19.3%	Shops don't open late	8.9%
5	Familiar / know where everything is	18.5%	Needs more / better public toilets	8.5%
6	Cleanliness	17.7%	Lack of choice and range of non-food shops	8.4%
7	Good market	17.0%	Expensive shops	6.6%
8	Nice atmosphere / friendly people	14.4%	Traffic congestion	6.3%
9	Choice of other leisure facilities (e.g. cinema, gym, leisure centre, etc.)	14.4%	Too busy	5.9%
10	Easy to get to by car	14.1%	Poor security / don't feel safe	5.2%

Source: household survey results

How could Bromley town centre change in the future?

5.41 Responses to this question were wide ranging. Interestingly, the most popular response (17.5%) was that the town centre needed more large shops / national retailers in the centre, in other words building on one of the key existing strengths of the centre. 16.1% of respondents stated that facilities in the town centre should stay open longer, and 13.4% stated that there should be more independent / local shops in the town centre.

5.42 A number of respondents also identified improvements to the leisure offer in the centre as being important to its future success — 12.7% identified a need for more cultural facilities in the town centre (e.g. art galleries, exhibition spaces); 12.3% identified the need for more daytime food & drink spaces; and 8.8% considered that more early evening food & drink spaces would be beneficial.

Table 5.4 Summary of responses regarding changes to Bromley town centre (household survey respondents)

Rank	Attribute	% of responses
1	More larger shops / national retailers in the town centre	17.51%
2	Facilities in the town centre should stay open longer / be open after work	16.06%
3	More small / local / independent shops in the town centre	13.36%
4	More cultural facilities in the town centre (e.g. art galleries, exhibition spaces, concert / live music spaces, theatres, cinemas)	12.71%
5	More daytime leisure food & drink in the town centre (e.g. cafes, restaurants)	12.32%
6	Better pavements	10.35%
7	More green spaces / trees / parks within / close to the town centre / the environmental quality of the centre should be improved	10.21%
8	More food shops / supermarkets in the town centre	10.16%
9	Better disabled access	9.66%
10	Better road surfaces / less potholes	9.31%

Source: household survey results

Pedestrian Flows

5.43 Upon our visits to the town centre, we observed levels of pedestrian activity to generally be strong, particularly along the prime shopping pitch of the pedestrianised section of the High Street which is located in the central area of the town centre. The Market Square, situated to the north of the central area is also pedestrianised and see high levels of footfall which is partially attributed to being adjacent to an entrance leading into The Glades. This area also contains a series of market stalls which not only generate footfall but contribute positively to the vitality of this particular area of the town centre.

5.44 Bromley South Railway Station is found at the southern end of the town centre and assists in generating footfall in an area comprising more secondary and non-designated frontage, and where there is a generally a poorer quality commercial and retail offer. Adjacent to the station is the entranceway into the Waitrose supermarket, we did not observe high levels of pedestrian activity in that particular area. The lack of footfall indicates that the supermarket is predominantly used for weekly shopping trips rather day to day shopping which is to be expected given the size of the store and supporting car park. To the south of the station, there is a parade of shops that are situated along Mason Hill, it was observed that there is noticeable lack of footfall as a consequence of the collection of commercial units being isolated from the High Street and that 3/5 units were vacant.

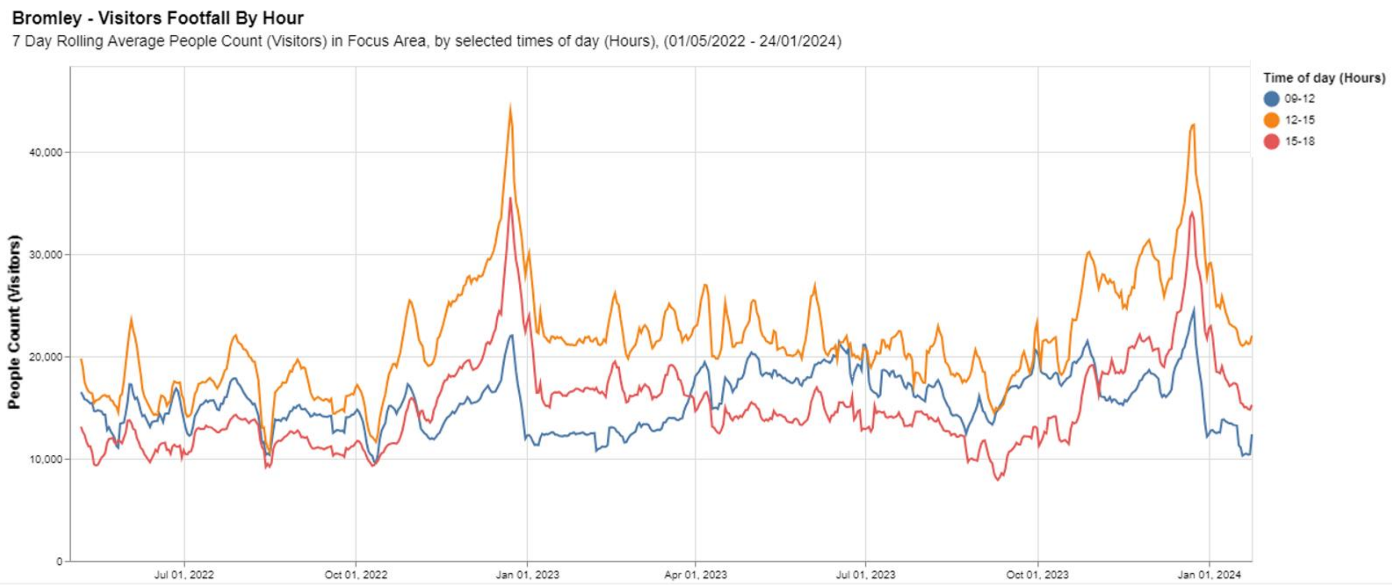
5.45 Likewise, the northwestern section of the town centre where the High Street follows onto London Road also sees lower levels of pedestrian activity which lacks the provision of quality retail outlets that attract people to the central area of the town centre. The lack of footfall in these secondary areas is not uncommon in higher-order centres such as Bromley and does not present a particular cause for concern.

5.46 A lack of pedestrian activity was observed within St Mark’s Square. Upon visits to the newly constructed development, it is apparent that the scheme is isolated from the rest of the town centre. There is a lack of pathways along the High Street which would provide access, meaning the pedestrians must walk around the new Civic Centre to access the site. Overall, the scheme would benefit from directional signage along the southern section of the High Street to help link the development with the rest of the town centre, enabling both to benefit from linked trips. The household survey undertaken in support of this study (discussed later in this report) identifies the Vue cinema which anchors the St Mark's Square development to be performing well, and there is scope for the wider town centre to benefit from this to a greater degree than currently appears to be taking place.

5.47 A key observation taken from visits to the town centre at different times of day, and supported through discussions with town centre stakeholders, is that footfall reduces significantly in the early evening as retail stores begin to close. This issue was most apparent in the central of the High Street which is predominantly comprised of retail outlets and lacks the provision of restaurants and bars which comprise the backbone of the nighttime economy; as we have set out previously, these uses are largely concentrated around High Street North, East Street and Widmore Road. However, even in these locations, some venues do not typically become busier until later in the evening, when bars and pubs typically attract larger numbers of visitors. This produces something of a 'gap' in activity across much of the central part of the town centre in the early evening (broadly 6pm-8pm).

5.48 To demonstrate this point, data from the London High Street Explorer shown in **Figure 5.3** shows the average footfall across Bromley town centre for the 18 months up to January 2024. As would be expected, particularly for a centre with as strong a comparison goods function as Bromley, over the course of a year footfall has a significant peak over the festive season. Over the course of the assessment period, footfall activity in the town centre is at its highest in the afternoon period (noon-3pm; denoted by the yellow line). For most of the period, footfall is then stronger in the morning period (9am-noon; blue line). In the evening period (3pm-6pm; red line), footfall in the town centre is consistently significantly below the afternoon peak.

Figure 5.3 Footfall data for Bromley town centre (June 2022 to Jan 2024) (London High Street Explorer)

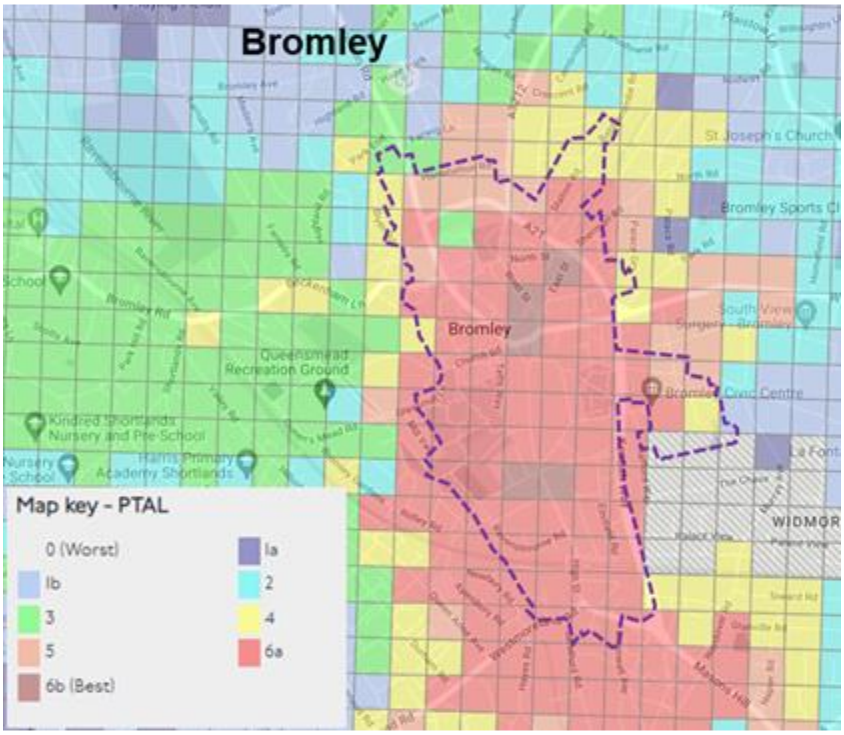


Source: London High Street Explorer

Accessibility

5.49 Figure 5.4 shows the public transport accessibility levels ('PTAL') which is measure created by Transport for London to indicate accessibility of a location by the public transport network, taking into account walk access time and service availability. The scoring ranges from 0 (worst) to 6b (best); the majority of Bromley town centre has a PTAL rating of 6a, meaning that the town centre is considered to have excellent access to public transportation services.

Figure 5.4 PTAL for Bromley town centre



Source: Transport for London (correct as of April 2024)

5.50 Bromley town centre benefits from provision of two railway stations; Bromley North and Bromley South:

- Bromley North connects to Grove Park (for onward connections to central London and Lewisham) via Sundridge Park, with services operating every 30 minutes (slightly higher at the morning peak).
- Bromley South offers a greater range of connections including the Thameslink line to London Blackfriars to the north and Sevenoaks to the south, operating every 30 minutes in either direction (again, with higher frequency levels during peak hours). The station is also served by Southeastern services providing a mixture of direct and local stopping services to/from London Victoria, which operate approximately every 15 minutes.
- Towards the east, Bromley South connects to Ramsgate via Gillingham and Margate, operating every 30 minutes. Bromley South also connects to Ashford International Station via Swanley and Maidstone East with direct services operating every 60 minutes, and to Dover every 30 minutes. These services all run to central London in the opposite direction meaning that, when combined, the station benefits from several trains an hour into central London.

5.51 The centre is also served by an extensive bus network, with some routes starting/ terminating at Bromley North station, but most services passing through the centre to the rear of The Glades / past the existing Civic Centre before extending southwards to locations such as Orpington, Croydon, Locksbottom and Bexleyheath. Overall, there is good number of bus stops throughout the town centre which provides convenient access to adjacent retail and service outlets. **Table 5.5** summarises current service provision, correct as of April 2024.

5.52 The town centre has recently benefited from the introduction of two 'Superloop' bus services, part of a wider Transport for London initiative to enhance connections between key nodal points in outer London through limited-stop, high-frequency bus routes; both the SL3 and SL5 services typically run five times an hour. The SL5, for example, has just nine stops between Bromley and Croydon, thus offering a relatively quick mode of transport between the two metropolitan centres.

5.53 The town centre is also served by two night-bus services running from central London. Overall, the centre can be considered to be extremely well connected to the public transport network, reflected in its high PTAL score.

Table 5.5 Summary of bus routes serving Bromley town centre

Route	Start	Terminus	Via	Typical daytime freq – every x minutes
Daytime routes				
61	Chislehurst	Bromley North Station	Petts Wood, Orpington, Locksbottom, Bromley	15
119	Bromley North	Croydon Airport	Hayes, Coney Hall, West Wickham, Croydon, Purely Way	13
126	Bromley town centre	Eltham High Street	Plaistow, Grove Park, Chinbrook, Mottingham	10
138	Coney Hall	Bromley North	Hayes, Bromley South	20
146	Downe Church	Bromley North	Keston, Bromley	60
162	Beckenham Jn	Eltham Bus Station	Beckenham, Bromley, Chislehurst, New Eltham, Eltham	15
208	Lewisham Station	Orpington	Catford, Bellingham, Bromley, Petts Wood, Orpington	15
246	Chartwell	Bromley North Station	Westerham, Biggin Hill, Leaves Green, Coney Hall, Hayes, Bromley	30
261	Locksbottom	Lewisham Station	Bromley, Plaistow, Grove Park, Lewisham	12
269	Bexleyheath Clock Tower	Bromley North Station	Bexley, Sidcup, Chislehurst, Bickley, Bromley	6
314	Eltham Bus Station	New Addington	Eltham, Elmstead, Plaistow, Bromley, Coney Hall, Addington	12
320	Biggin Hill	Catford Bridge Station	Leaves Green, Bromley, Southend, Bellingham	12
336	Thomas Lane, Lewisham	Locksbottom	Southend, Plaistow, Bromley, Bickley	15
352	Bell Green	Bromley North Station	Lower Sydenham, New Beckenham, Beckenham, West Wickham station, Bromley	20
358	Orpington Bus Station	Crystal Palace Parade	Orpington, Locksbottom, Bromley, Eden Park, Upper Elmers End, New Beckenham, Penge	12
367	West Croydon Bus Station	Bromley North Station	Croydon, Shirley Oaks, Elmers End, New Beckenham, Beckenham, Shortlands, Bromley	20
61	Chislehurst	Bromley North Station	Petts Wood, Orpington, Locksbottom, Bromley	15
Superloop routes				
SL3	Thamesmead Town Centre	Bromley North Station	Abbey Wood, Bexleyheath, Sidcup, Chislehurst, Bromley	12
SL5	Bromley North Station	Croydon town centre	Eden Park, Spring Park, Croydon	12
Night buses				
N3	Oxford Circus Station	Bromley North Station	Brixton, Crystal Palace, Beckenham, Bromley South	30
N199	Trafalgar Square	St Mary Cray Station	London Bridge, Deptford, Lewisham, Bromley, Petts Wood, Orpington	30

Source: Transport for London (all information correct as of April 2024)

5.54 Bromley also is a highly accessible town centre for those wishing to access by car, Kentish Way (A21) runs adjacent to the centre to the east which allows convenient access to Elmfield Road which adjoins the central area of the High Street in addition to Mason Hill further to the south which enables access the southern end of the High Street including Bromley South Station car park and the Waitrose store. The town centre benefits from the provision of several car parks, as listed below and illustrated in Figure 5.5:

- The Glades Shopping Centre car park contains 1500 spaces and costs £2.20 for a 2-hour stay.
- The Civic Centre is a 491 space car park at cost of £2.60 for a two hour stay, which is located on the eastern side of Kentish Way and is connected to The Glades via an above ground pedestrian walkway.
- The Mall which is located directly to the south of The Glades Shopping Centre, contains 255 space car park at a cost of £3.90 for a two hour stay.
- An 87-space car park, operated by LBB is found adjacent to Bromley North Railway Station and costs £2.80 for a two hour stay.
- St Mark's Square, located in the southwestern section of the town centre contains 300 space underground car park, at a cost of £2.80 for a two hour stay.
- A 24 space car park is located in the north west section of the centre. The site is operated by LBB and costs £2.80 for a two hour stay.
- A 218 car park attached to Bromley North Railway Station[42] costs £6.10 for a two hour stay.
- The car parking provision in the town centre is supplemented by Waitrose (181 spaces) and Sainsbury's (211 spaces) which both provide free parking for customers.

Figure 5.5 Car parking provision around Bromley town centre

Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Bromley town centre

[42] This car park has planning permission to be redeveloped to provide a 75 unit housing scheme (LBB application ref. 23/01547/FULL1)

Perception of Safety and Occurrence of Crime

5.55 According to data published by the Metropolitan Police, and as shown in **Table 5.6**, the number of offences that were recorded in Bromley town centre ranged from 273 in November 2023 to 218 in April 2024. Consistently across this period the greatest number of offences recorded were shoplifting and theft. Whilst these statistics appear quite high, Bromley is a large town centre that in turn draws a large number of visitors and shoppers. Upon our visits to the town centre we did not observe any crime or anti-social behaviour, however from our conversations with stakeholders, shoplifting is an area of concern amongst businesses in the town centre.

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Table 5.6 Crime statistics for Bromley town centre, November 2023 – April 2024

Bromley	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	21	15	17	18	21	28	**120**
Burglary	9	3	2	6	1	2	**23**
Criminal Damage and Arson	12	9	11	5	0	0	**37**
Drugs	12	13	12	2	24	14	**77**
Possession of Weapon	0	1	4	0	1	0	**6**
Public Order	25	23	18	11	14	6	**97**
Shoplifting	72	67	49	54	35	51	**328**
Theft	70	66	57	53	40	27	**313**
Vehicle Crime	2	2	7	33	0	1	**45**
Violence and Sexual Offences	46	60	46	17	46	39	**254**
other crime	4	1	1	51	36	57	**150**
Total	**273**	**260**	**224**	**250**	**218**	**225**	**1,450**

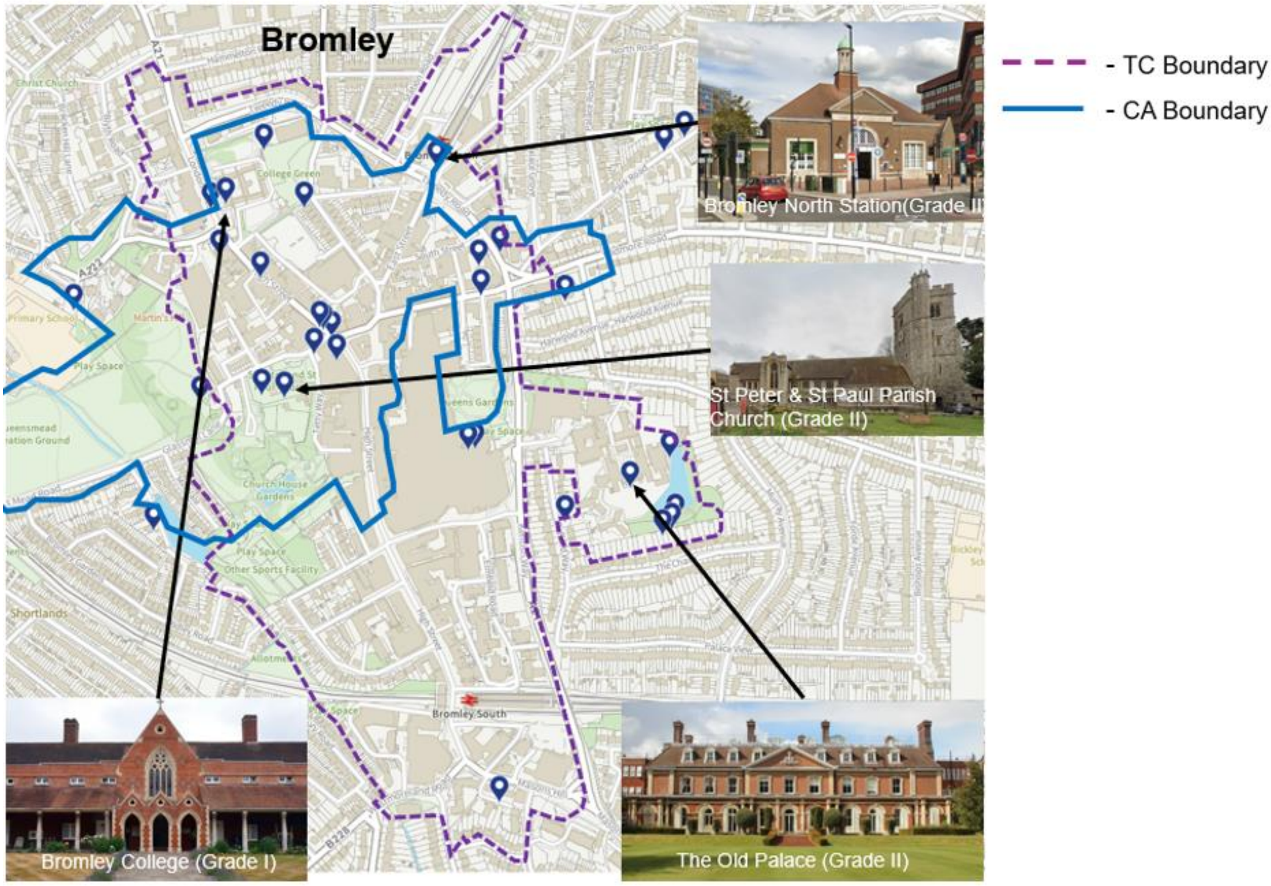
*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

5.56 Bromley can be characterised as having generally positive environmental quality, being well maintained and a lack of litter was observed around the town centre. Whilst a number of listed buildings are found in the northern section of the town centre (which also falls under the Bromley Town Centre Conservation Area that was designated in 2022), the town centre is, for the most part, not considered historic in nature and instead comprises a mixture of generally functional, modern architecture. In particular, the Grade II listed Church of St Peter and St Paul located to the west of Primark aids to the setting of the surrounding area and makes a positive contribution to visual attractiveness of the area.

5.57 The northern section of the town centre contains three Grade II listed pubs; The Patridge, Star & Garter along with the Swan & Mitre which provide an historic contribution to the overall modern town centre. Towards the eastern section of the town centre, the Grade II listed The Old Palace and surrounding grounds contribute greatly to creating an historic setting and is a visually attractive venue. The town centre boundary also contains the Grade I-listed Bromley and Shepherds College, which is the oldest building in the Borough.

Figure 5.6 Heritage assets in Bromley town centre



Base map source: Historic England, accessed April 2024. Annotated to show policy boundary of Bromley town centre., Conservation Area boundary and key heritage assets.

5.58 The overall the quality of the visual appearance decreases southwards towards the station, and particularly to the south of the pedestrianised section of the High Street, which does not seem to have had the same level of investment in the public realm as the rest of the centre. The comparative lack of investment is reflective of the retail offer of the area which is considered to be mid to lower market and/or aligned with uses to serve commuters using Bromley South station compared to the central High Street area which contains several high end national retailers, whilst East Street and Widmore Road contain the majority of the restaurants and bars, therefore have been subject to greater levels of investment to improve the quality of the public realm. Architecturally this end of the town centre is also less inviting.

5.59 Scope to extend the quality of the public realm of the pedestrianised section of the High Street / elsewhere in the centre further south towards St Mark's Place / Bromley South station should be investigated to improve the coherence of the centre, and to smarten up the environmental quality of this part of the centre. Scope for additional crossing points across the wide road should also be investigated.

5.60 The pedestrianised zone within the central area of the High Street along primary frontages, is comprised of attractive paving contributes to the visual quality of the town centre and enables high levels of footfall which in turn maintains its overall vitality. The pedestrianised area, adjacent to the entrance of the shopping centre benefits from landscaped areas and the northern section, towards Market Square contains a series of trees which form a high quality public realm that complements the surrounding commercial setting.

High quality public realm along East Street in the northern part of the town centre

The quality of the public realm is carried on through the central stretch of the pedestrianised High Street, including high quality paving and contemporary street furniture

High quality public realm but low footfall at St Mark's Square

5.61 The recently opened St Mark's Square is a contemporary mixed use development that has the potential to greatly improve the quality of the offer within the southern section of the town centre as the scheme contains a series of modern ground floor commercial units. As mentioned, given the layout of the scheme, it is quite isolated from the rest of the town centre and as a result does not have a visible impact upon the streetscene when walking along the High Street.

5.62 Despite The Glades Shopping Centre opening in 1991, the façade facing onto the pedestrianised section of the High Street is modern in appearance and contributes positively to the surrounding commercial setting. Internally, the shopping centre is also visually appealing, the shop fronts are in good condition with good levels of pedestrian activity seen throughout.

5.63 Whilst there are a number of vacant units within shopping centre, the most prominent is the former Debenhams department store that extends across three floors which has been vacant since the national retailer went into administration. It is not considered that the Debenhams store and other vacant units detract from the overall good vitality of the shopping centre as they are covered by contemporary hoarding and there is still a sufficient offering of high quality national retailers. In terms of other prominent vacant units, the former Topshop store is located towards the northern section of the centre and has remained vacant since 2020, although there are preliminary discussions to relocate Bromley library to this site. In addition, the former Wilko store that is situated towards the southern end of High Street which has remained vacant since 2022. Compared to the Debenhams this unit is much more prominent and imposing as a vacant unit and is clearly noticeable when approaching the town centre from the south.

Conclusion

5.64 It can be considered that Bromley town centre is displaying positive levels of vitality and viability. Its comparison goods shopping role remains strong notwithstanding the recent challenges to the retail sector, although the lack of demand to fill two large vacant units perhaps signals that an alternative approach for these units may need to be considered. Nevertheless the remainder of the comparison goods offer, which is concentrated within The Glades Shopping Centre and the central area of the High Street, is appropriate to the town's status a metropolitan town centre. The centre is also supported by a broad and diverse range of national and specialist independent retailers, in addition to a good range of food & beverage uses, other leisure (e.g. cinema, theatre, competitive socialising).

5.65 The town centre has a well performing evening economy offer with a good offer of bars and restaurants which are predominantly located towards the northern section of the centre. This area has also benefited from significant investment in improvements to the public realm, including the pedestrianised section of the High Street which creates an attractive streetscene. It does however clearly have an 'activity gap' arising because of the relatively early closure of retail outlets (for a centre of the size/function of Bromley), until beginning to 'come alive' again later in the evening. Greater crossover of these two key strands of town centre activity should be encouraged.

5.66 Whilst the southern section of the centre has not been subject to the same form of public investment, private developer led schemes such as St Mark's Square and, if the legal agreement is approved, the redevelopment of the Waitrose store will deliver further investment to the southern part of the town centre. The relocation of the Civic Centre to the office development next to Bromley South station will add further footfall to this part of the centre, for which investment in public realm and the street scene is noticeably poorer than the rest of the centre.

5.67 The centre has the challenge of being a long, elongated town centre — over 1km end to end — but with uses concentrated in fairly distinct areas. The size of the centre does appear to suggest that supply of commercial properties is outstripping demand, and the Council needs to monitor vacancy rates in the centre carefully. Whilst there is evidence they appear to be reducing, they remain the highest in the Borough.

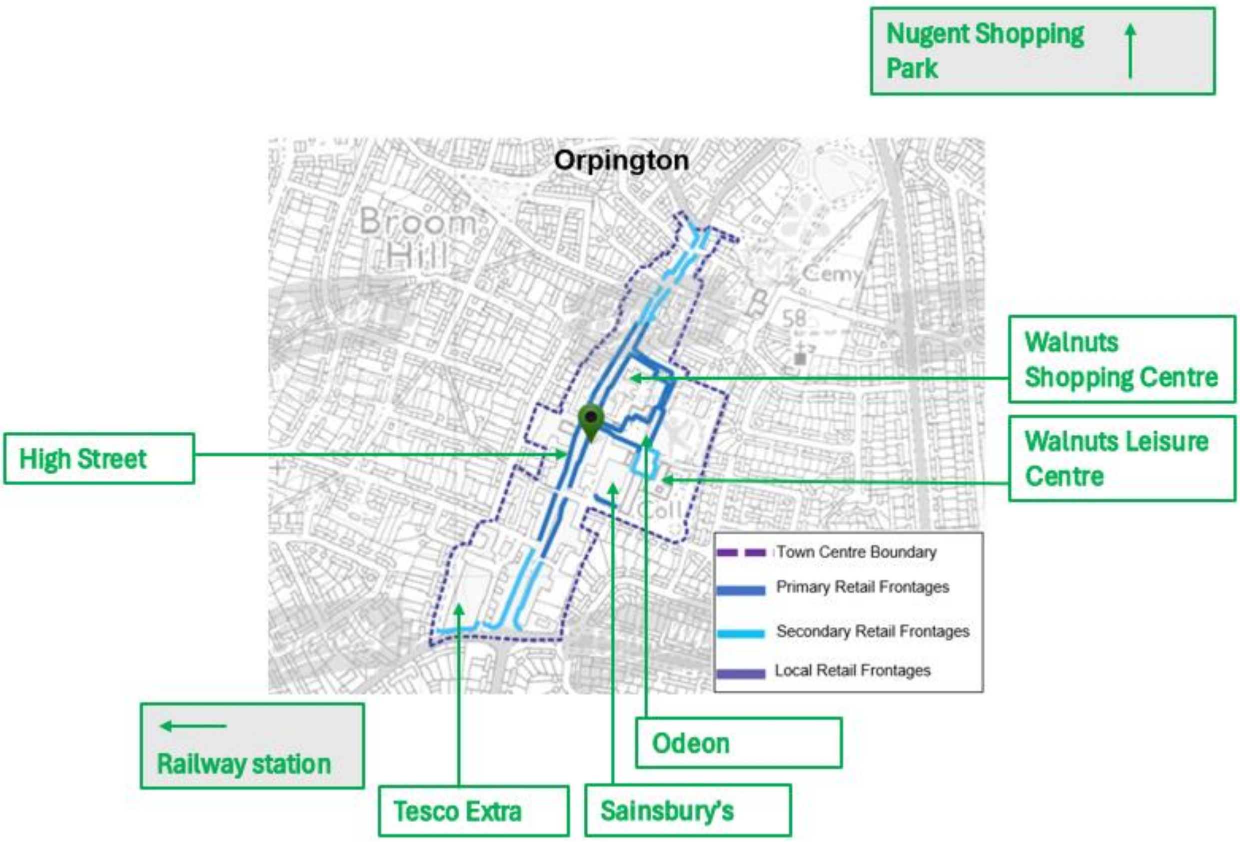
Table 5.7 Summary of strengths and weaknesses of Bromley town centre

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"

SECTION 6 | TOWN CENTRE HEALTH CHECKS — ORPINGTON MAJOR TOWN CENTRE

6.1 Orpington is defined as a major centre within the retail hierarchy of LBB and comprises the second largest town centre within the borough. The centre is arranged along a linear High Street which is anchored by Sainsbury's supermarket is centrally located, in addition to a Tesco Extra supermarket found at the southern end of the centre. A part-covered shopping centre, The Walnuts Centre, also forms part of the retail offer in the centre. A concentration of out-of-centre retail warehouses, Nugent Shopping Park lies outside of the town centre, approximately 1.5km to the north.

Figure 6.1 Local Plan town centre boundary & retail frontages in Orpington town centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses

6.2 The most recent assessment of the diversity of uses of Orpington is the Experian Goad survey of the town centre, which was undertaken in August 2023. Firstplan undertook site visit to Orpington town centre in February 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses is shown in **Table 6.1**, which shows Orpington to sit marginally below UK averages in terms of the proportion of its units occupied by convenience and comparison goods operators, but has a services offer which is noticeably (+7%) above the UK average.

Table 6.1 Diversity of uses in Orpington town centre (Experian Goad August 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	24	9.5	10.1	-0.6
Comparison	78	30.9	33.5	-2.6
Services (Financial and business + leisure services)	118	46.8	39.8	+7
Vacant outlets + miscellaneous	30	11.9	15.5	-3.6
TOTAL	252	100%	100%	-

Source: Experian Goad survey, August 2023

6.3 Orpington therefore has a strongly performing services sector, which in total accounts for 118 units within the centre. Of these, restaurants, cafes, and fast food account for a total of 57 units (3.8% higher than the national average). The second most prevalent use is hairdressing, beauty & health, with total of 35 units which accounts for 14% of the total number of units (1% higher than the national average). The town centre is also well provided for in terms of banks & financial services (10 units) and estate agents & auctioneers (12 units).

Vacant units

6.4 At the time of the Experian Goad survey (August 2023) Orpington had a vacancy rate of 11.9%. From our site visits to the centre undertaken in February 2024, it was observed that there are clear spatial clusters in the location of vacant units within the centre, with the southern part of the town centre (broadly, south of the Walnuts Centre) displaying low levels of vacancy, but the northern end of the centre, where the quality of the retail stock is generally poorer, showing higher levels of vacancy. However, it was observed that the rate of vacancy was noticeably higher in the northern end of the High Street. In particular, neighbouring units 115,117 and 119 High Street have been vacant since 2016 and are visually prominent. These units are subject to a live planning application[43] which proposes the creation of two self-contained commercial units, with one unit to be used as an adult gaming centre (sui generis use) and the other to be used for Class E purposes,

6.5 We also identified the following changes to the vacant units in the town centre subsequent to the Experian Goad survey being undertaken in the town centre in August 2023. These show that a number of units which were listed by Goad as being vacant have now been occupied:

- 192 High Street is now let by 'Mobile & Vape Store'
- 145 High Street is now let as convenience store

6.6 A number of further units in the centre have subsequently become vacant, including former restaurants at 106 and 132/134 High Street, a furniture shop at 115 High Street, and Barclays have closed their branch at 229-231 High Street. The net position in terms of vacancy overall appears to be broadly similar. It was also noted that the Walnuts centre appears to have a number of stores / occupants which may be on temporary or short term leases, which is likely to be aligned with wider plans for future development of this location, as identified elsewhere in this report.

[43] Application ref. 24/02388/FULL1

Customers views and behaviour

Frequency of visit to Orpington town centre

6.7 Respondents to the household survey were asked when they last visited Orpington town centre. 5.9% of respondents stated that they had visited in the last month (and 8.8% stated that they had visited within the last week). 23.5% of respondents stated that they had not visited in the last 12 months.

6.8 The household survey area is split into zones to enable localised patterns of shopping and leisure visits to be captured. Orpington town centre sits in zone 2, and from this zone, 41.6% of respondents had visited within the last week and 5.9% within the last month. The findings show that Orpington town centre is pulling good levels of footfall from its immediate catchment. In zone 1, which includes Bromley town centre and Beckenham, 7.2% of respondents has visited Orpington town centre in the last week, whilst 8.3% had visited in the last month. In zone 3, which covers the Biggin Hill area, 54.8% of respondents had visited the town centre in the last week, whilst 11.7% had visited within the last month. This indicates that Orpington is fulfilling its role as a major centre in which residents within the wider Bromley Borough are choosing to visit to purchase goods and utilise services

Main purpose of visit

6.9 As mentioned previously, Orpington town centre is well provided for in terms of foodstores, containing both a Tesco Extra and a Sainsbury's supermarket. This is reflected in the household survey findings, with 11.4% of respondents stating that food shopping is the main purpose for visiting the town centre, including 26.3% of respondents of zone 1 and 21.6% of respondents from zone 3.

6.10 Despite this, the purchasing of non-food shopping was the main purpose for visiting the centre overall, accounting for 23.9% of total visits to Orpington. Whilst within its local zone (zone 2) and nearby catchments such as zone 3, food shopping was marginally the reason for visiting, in the remaining zones, non-food shopping is the main purpose for visiting the town centre including zone 1 (16.6%), zone 4 (24.7%) and zone 6 (50.1%).

6.11 In terms of leisure uses, daytime leisure uses which include cafes, restaurants account for 9.9% of visits to the town centre, compared to evening leisure uses that includes restaurants, pubs, bars which account for 5.9% of trips. Orpington town centre contains other leisure uses such as a leisure centre, cinema and a number of gyms, however these leisure uses account for 6.1% of total trips including 9.4% from zone 2 (local zone).

Table 6.2 Main purpose of visit to Orpington town centre (household survey respondents)

Rank	Main purpose of visit — Orpington town centre	% of responses
1	Purchasing non-food shopping	23.9
2	Purchasing food shopping	11.4
3	Daytime leisure activity, e.g. visiting cafes, restaurants	9.9
4	Window shopping	6.8
5	Other leisure activities e.g. visiting cinema, gym, leisure centre	6.1

Source: household survey results

Linked trips

6.12 Respondents were also asked what other activities or services they used when visiting Orpington town centre. Purchasing food shopping is the most popular linked activity, with 15.3% of respondents stating that they purchase food shopping during visits to the town centre. This is followed by visiting cafes and restaurants which accounts for 12.4% of linked trips to Orpington. Non-food shopping also makes an important contribution to linked trips to the town centre, with 11.9% of respondents undertaking this as a linked activity. 30.8% of respondents stated that they did not undertake any linked shopping trips.

What respondents like about Orpington town centre

6.13 Respondents were then asked what attributes of Orpington town centre they liked the most; a summary of these is provided in **Table 6.3** below. It shows that 25.5% of respondents stated that what they liked most about the centre was the choice and range of shops, followed by the choice of places to eat/drink (21.0%). 15.3% of respondents stated that there were no reasons why they liked visiting Orpington town centre.

6.14 14.9% of respondents stated that they liked that the town centre because it was close to home. Further positives related to provision of retail outlets; 12.9% stated that Orpington had a good market, whilst 10.2% mentioned that there is a good range of supermarkets and 8.5% of respondents liked the centre as the result of the range of independent retailers, indicating the importance of such facilities in maintaining footfall in higher order centres. Supporting leisure uses also contribute to the attractiveness of the town centre, with 8.3% of respondents agreeing that choice of other leisure facilities including cinema, gym, and leisure centre was the reason why they liked the town centre.

6.15 Accessibility also plays an important role; 9.1% of respondents stated that the centre was easily accessible by public transport, as identified in the health check for the town centre, a total of 14 bus routes connects Orpington with surrounding areas.

6.16 Further positive responses relate to the town centre being inexpensive (8.6% of respondents). Respondents also identified that the town centre having a nice atmosphere/ people as a reason for liking Orpington (8.4% of respondents).

What respondents dislike about Orpington town centre

6.17 Respondents were then asked what they disliked about Bromley town centre. Positively, 18.1% stated that there was 'nothing' they disliked about the centre, although it should be taken into account that other centres lower in the Borough's retail hierarchy score higher levels of satisfaction.

6.18 The main thing which respondents stated they disliked was the lack of choice and range of non-food shops (15.6% of responses), followed by the amount of empty shops (13.5% of responses). 13.5% of respondents did not like the amount of charity shops whilst 10.6% of respondents stated they did not think shops were open late enough in the centre.

Table 6.3 Likes and dislikes of Orpington town centre (household survey respondents)

Rank	Attribute – most liked (Orpington)	% of responses	Attribute – most disliked (Orpington)	% of responses
1	Choice and range of shops	25.5%	Lack of choice and range of non-food shops	15.6%
2	Choice of places to eat / drink (e.g. restaurants, cafes, pubs, etc.)	21.5%	Empty shops	13.5%
3	Close to home	14.9%	Too many charity shops	11.0%
4	Good market	12.9%	Shops don't open late	10.6%

5	Choice of supermarkets	10.2%	Not enough parking spaces	10.5%
6	Easily accessible by public transport	9.10%	Poor atmosphere	9.2%
7	Inexpensive	8.6%	Poor environmental quality of centre	8.5%
8	Choice of independent retailers	8.5%	Expensive shops	8.1%
9	Nice atmosphere / friendly people	8.4%	Inconveniently located car parking	7.4%
10	Choice of other leisure facilities (e.g. cinema, gym, leisure centre, etc.)	8.3%	Lack of choice and range of independent retailers	7.3%

Source: household survey results

<u>How could Orpington town centre change in the future?</u>

6.19 In answer to this question, the most popular response was providing more large shops/ national retailers in the town centre. Given the concentration of national retailers in the nearby Nugent Shopping Park relative to the provision within Orpington town centre, it is not surprising that this factor is the leading issue in the improvement of the centre. Other retail related issues include extending the opening hours of stores (16.8% of responses) and the provision of more independent shops (12.0% of responses).

6.20 A number of respondents also identified improvements to the leisure offer in the centre as being important to its future success — 10.4% identified a need for a greater daytime leisure food & drink offer (e.g. cafes and restaurants); 9.1% identified the need for more early evening food & drink facilities in the town centre; 7.7% identified more late evening / nightlife facilities in the town centre (e.g. late bars, clubs).

6.21 Other factors which are considered to improve the town centre include improving the environmental quality (11.4% of responses) as well improving the pavements (9.7% of responses). 7.7% of respondents stated that the town centre would benefit from more cultural facilities in the town centre (e.g. art galleries, exhibition spaces, concert / live music spaces, theatres, cinemas).

Table 6.4 Summary of responses regarding changes to Orpington town centre (household survey respondents)

Rank	Attribute	% of responses
1	More larger shops / national retailers in the town centre	20.5%
2	Facilities in the town centre should stay open longer / be open after work	16.8%
3	More small / local / independent shops in the town centre	12.0%
4	More green spaces / trees / parks within / close to the town centre / the environmental quality of the centre should be improved	11.4%
5	More daytime leisure food & drink in the town centre (e.g. cafes, restaurants)	10.4%
6	More community facilities e.g. healthcare facilities, community centre, library)	9.9%
7	Better pavements	9.7%
8	More early evening food & drink facilities in the town centre (e.g. restaurants, pubs, bars)	9.1%
9	More late evening / nightlife facilities in the town centre (e.g. late bars, clubs)	7.7%
10	More cultural facilities in the town centre (e.g. art galleries, exhibition spaces, concert / live music spaces, theatres, cinemas)	7.1%

Source: household survey results

Retailer Representation & balance between independent and multiple stores

6.22 Orpington town centre is a relatively large town centre and benefits from a reasonable range of representation from national multiple retailers. The key anchor stores include Sainsbury's who have had a presence within the town centre since the 1970's, whilst a more contemporary Tesco Extra supermarket, located at the southern end of the town centre opened in 2009. An Iceland supermarket is also found adjacent to Centre towards the centre of the High Street.

6.23 Other national retailers found along the High Street include Peacocks, B&M, Boots, Superdrug, Shoezone, Savers Health & Beauty, Poundland and the Entertainer toy shop. For the most part the national retailers present in the centre towards the middle to lower-end of the market in terms of the quality of the offer, and are orientated towards day to day shopping needs. Positively there are examples of national retailers continuing to invest in the centre, including Poundstretcher who have recently occupied the former Wilko unit within the Walnuts Shopping Centre. The High Street also has a good offering of independent retailers including Liberty's Fashion and Tone Clothing along with multiple grocery stores.

6.24 National restaurant chains such as KFC, McDonald's and Taco Bell are also present in the centre, however Orpington lacks much in the way of provision of national restaurant operators with the exception of Nando's. Notwithstanding this, the town benefits from the provision of a wide variety of independent restaurants which are evenly distributed across the High Street. A Costa Coffee is found towards the southern end of the High Street whilst several independent coffee shops and cafes are also found along the High Street.

6.25 In terms of leisure activities, an Odeon cinema is located centrally within the High Street and is located opposite the Walnuts Leisure Centre which contains two swimming pools, a gym and a five court sports hall. In terms of the evening economy, three bars and one pub are also found along the High Street. The Odeon cinema is a positive addition to the overall offer of the centre and acts as an 'anchor' in its own right. The Orpington GPO Bar & Kitchen is a former post office that is situated opposite the shopping centre, and makes a positive contribution both to the visual attractiveness and wider evening economy of the centre. A Loungers Group café/bar (Pato Lounge), which opens throughout the day and into the evening, is also centrally located on the High Street and makes a positive addition to the centre.

Pedestrian flows

6.26 From our site visits to Orpington, we observed generally good levels of pedestrian activity, particularly towards the southern section of the High Street. The activity in the locality is likely attributed to the Tesco Extra found at the southwestern corner of the major centre which contains a free car park for customers that is likely to enable support other retailers in the town centre.

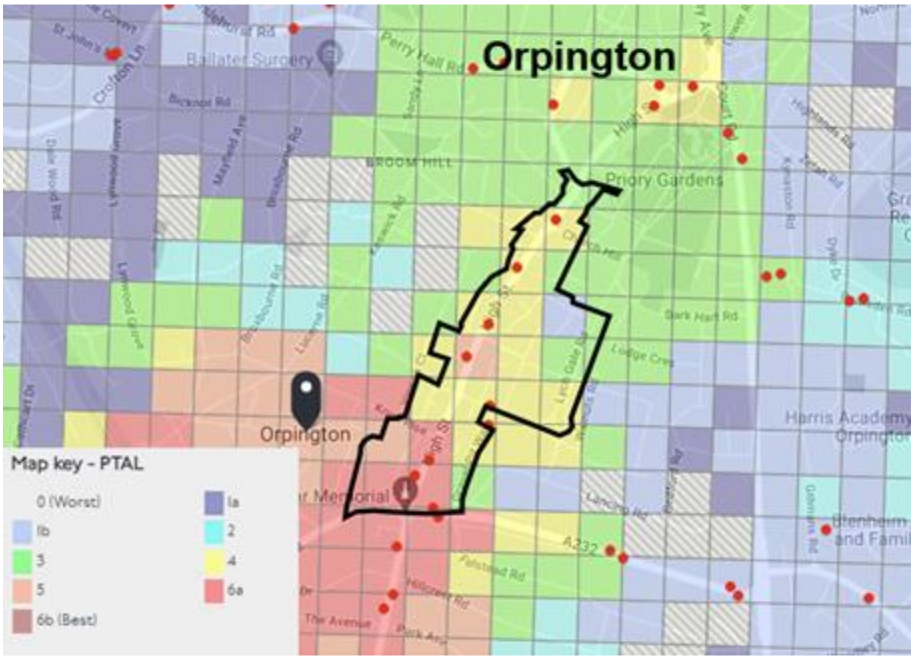
6.27 There was a noticeable difference in the level of footfall between the northern and southern ends of the High Street, with the northern end noticeably lacking footfall. This is caused by the poorer quality retail and commercial offer, with the units found to the north of Walnuts Shopping Centre predominantly in use take away restaurants and a number of vacant units, thus providing little in the way of 'attractors' to assist in generating footfall.

6.28 Whilst the central area of Walnuts Shopping Centre appeared busy which contains a children's play area there was a lack of footfall in and around the shops themselves and most of the units within the centre are of poor quality or in non retail use. Pedestrian activity increased at the eastern entrance of Walnuts Shopping Centre that connects to an outdoor area which hosts a number of market stalls that are adjacent to the leisure centre as well as the Sainsbury's store and library. Additional footfall in this area is also generated by the London South East Orpington College Campus which is situated adjacent to the leisure centre.

Accessibility

6.29 Orpington can be considered a highly accessible town centre. The town centre is well connected to the strategic road network, with the A20 found to the north which provides connections to Swanley to the east and Eltham to the west. Approximately 2.5km to the south of the centre lies a junction to the A21 that connects to the Junction 4 of the M25 to the east and is principal arterial route to Croydon to the west. In terms of public transport accessibility. PTAL ranges from 3 (at the northern end of the centre) to 6a (at the southern end of the centre), the improved PTAL driven by closer access to the railway station from the southern end of the centre as well as a higher number of bus routes serving this end of the centre (see **Figure 6.2**).

Figure 6.2 PTAL map for Orpington town centre



Source: Transport for London (correct as of April 2024)

6.30 Orpington High Street is a busy bus corridor, as is the A232 Station Road at the southern end of the centre, which is heavily used by bus routes which start and terminate journeys at Orpington Station. The centre is served by buses connecting the centre to locations such as Bromley, Lewisham and Sevenoaks, and also local routes which are prefixed by the letter 'R'. Bus stops are located throughout the town centre which provides convenient access to adjacent retail and service outlets. A summary of bus routes serving the town centre is set out at **Table 6.5**; overall we consider the centre well provided for by local bus services.

Table 6.5 Summary of bus routes serving Orpington town centre

Route	Start	Terminus	Via	Typical daytime freq – every x minutes
Daytime routes				
B14	Orpington	Bexleyheath Library	St Paul's Cray, Sidcup and Bexleyheath	30
R1	Green Street Green	St Paul's Cray	Chelsfield Station, Orpington, St Mary Cray	20
R2	Orpington	Biggin Hill	Locksbottom, Leaves Green	30
R3	Locksbottom	Orpington	Crofton, Petts Wood, St Mary Cray	20
R4	Locksbottom	St Paul's Cray	Orpington, St Mary Cray	20
R5	Orpington Bus Station	Green Street Green	Orpington	150
R6	Orpington	St Paul's Cray	St Mary Cray	30
R7	Chelsfield	Chislehurst	Orpington, Petts Wood, Bickley, Chislehurst Station	30
R8	Orpington Bus Station	Biggin Hill	Green Street Green, Downe,	90
R9	Orpington Station	Gillmans Road	Orpington town centre	12
R10	Orpington Bus Station	Green Street Green	Orpington	150
R11	Green Street Green	Sidcup	Orpington, St Mary Cray, St Paul's Cray,	10
51	Orpington	Woolwich	St Mary Cray, St Paul's Cray, Sidcup, Chislehurst, Welling, Plumstead	10
61	Bromley	Chislehurst	Locksbottom, Crofton, Orpington, Broom Hill	15
208	Lewisham Station	Orpington	Catford, Bellingham, Bromley, Petts Wood, Orpington	12
353	Forestdale	Ramsden Estate, Orpington	Addington, Hayes, Locksbottom, Orpington	20
358	Orpington Bus Station	Crystal Palace	Locksbottom, Bromley, Eden Park, Elmers End, New Beckenham, Penge, Anerley	12
477	Bluewater Shopping Centre	Orpington	Dartford, Swanley, St Mary Cray	30
Daytime routes				
N199	St Mary Cray	Charring Cross Station	St Mary Cray, Orpington, Petts Wood, Bromley, Bellingham, Catford, Lewisham, Greenwich, Canada Water, London Bridge	30

Source: Transport for London (all information correct as of April 2024)

6.31 Orpington station is located approximately 600m to the west of the southern end of the High Street with a high number of bus services also running between the two; the walk between the station and the town centre is at an incline and involves footpaths which are at times relatively narrow. The station provides connections to a number of London terminals including Charing Cross, London Victoria and Cannon Street, with a least three services per hour provided for each terminal during peak times. Orpington Railway Station is also part of the Thameslink line that connects to Bromley South, Catford, Blackfriars and St Pancras. Heading southwards, services to Tunbridge Wells operate every 15 minutes and to Hastings every 30 minutes. One issue that was observed from our visits to the Orpington is that there is lack of signage outside of the Orpington Railway Station that indicates directions to the town centre; given the station's slightly detached relationship to the town centre enhancement of this would be beneficial.

6.32 The town centre benefits from the provision of car parks along the High Street, including a 525-space car park serving Walnuts Shopping Centre and the multistorey carpark found adjacent to Orpington War Memorial in the southern section of the High Street. Both Tesco and Sainsbury's provide free parking for a two hour stay for customers.

Figure 6.3 Car parking provision around Orpington town centre

Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Bromley town centre

Perception of safety and occurrence of crime

6.33 In accordance with data released by Metropolitan Police and as shown in **Table 6.6**, a total of 368 offences were recorded within Orpington town centre between November 2023 and April 2024, with shoplifting and anti-social behaviour comprising the most common offences. Across the last six months, the number of crimes that were recorded ranged from 40 offences in December 2023 to 86 offences in April. Upon our visits to Orpington, we did not encounter any anti-social behaviour or significant evidence of this in the town centre.

Table 6.6 Crime statistics for Orpington town centre, November 2023 – April 2024

Orpington	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	11	5	12	8	19	17	**72**
Burglary	1	2	1	5	6	3	**18**
Criminal Damage and Arson	2	7	11	5	0	1	**26**
Drugs	0	0	1	1	0	0	**2**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	1	0	1	1	1	1	**5**
Shoplifting	0	5	10	13	21	35	**84**
Theft	4	5	5	5	6	11	**36**
Vehicle Crime	1	3	0	2	4	0	**10**
Violence and Sexual Offences	12	7	0	16	6	7	**54**
other crime	14	6	16	10	4	11	**61**
Total	**46**	**40**	**63**	**66**	**67**	**86**	**368**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

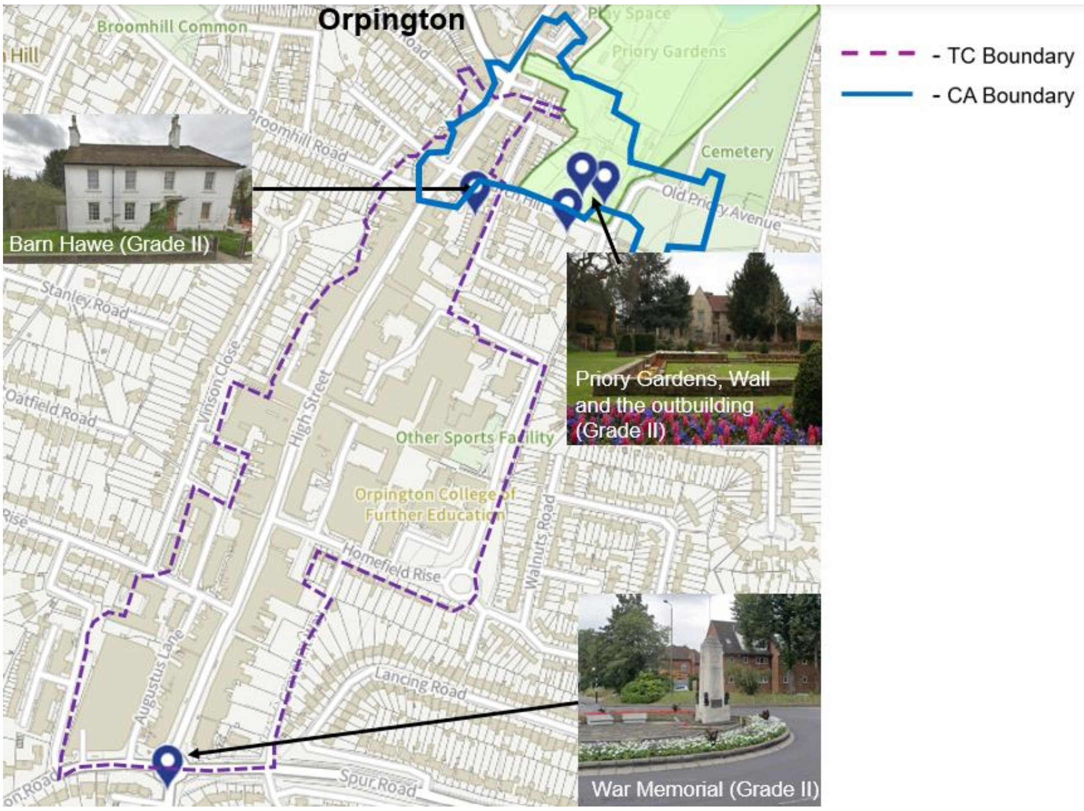
Town Centre Environmental Quality

6.34 Orpington can be considered to have a generally positive environmental quality. The High Street is well maintained and was observed to be generally clean and well maintained at the time of our visit. The centre of the town is generally fairly utilitarian in nature towards its southern half, with a more interesting and diverse range of architectural styles to the north. Just one listed building is located in the town centre however the northern end of the High Street falls under The Priory, Orpington Conservation Area which was designated in 2022. This area partially contains Priory Gardens, a Grade II listed Park & Garden along with a collection of Grade II listed structures which are found to the east of the High Street and make a positive contribution to the setting of the centre. Indeed, it is considered that there is scope for more to be made of this key asset and 'green lung' in terms of promoting its ease of access from the wider town centre.

6.35 The High Street benefits from having wide pavements which enables restaurants and cafes to have outdoor seating areas which contributes to the overall vitality, although the pavement becomes narrower towards the northern section of the High Street to the point where pedestrians are forced to be in relatively close proximity to passing vehicular traffic. Mature trees are found along large stretches of the High Street which makes a positive contribution to the visual appearance of the centre. In particular, the southern end of the High Street has a visually attractive street scene with significant areas of landscaping and a higher density of trees. The southern 'gateway' entrance by the war memorial benefits from being landscaped and makes a distinctive contribution to the setting of the High Street.

6.36 The shopfronts are generally well maintained, however there is a distinct difference in the quality of building stock between the northern and southern sections of the High Street, with the northern end containing a number of run down take away restaurants which require renovation. Moreover, there is a grouping of vacant units along the northern section of the High Street which have a negative impact upon the visual appearance and vitality of the centre. The northern section also contains a number of key units that would contribute the nighttime economy when in use including the Royal Kitchen, a former pub, along Aksular and Scalia which are both large restaurant units.

Figure 6.4 Heritage assets in Orpington town centre



Base map source: Historic England, accessed April 2024. Annotated to show policy boundary of Orpington town centre, Conservation Area and key heritage assets.

6.37 Whilst the entrance of Walnuts Shopping Centre has a modern façade which has benefitted from being enhanced in recent years, the internal element of the building is in need of updating, in particular the central area which contains seating and a children's play area would benefit from refurbishment. Within the shopping centre, three units are occupied as community centres which are run by Hope Church. The largest of these is Units 39-47 which was formerly occupied by M&co clothing store. Although such uses have an important community role and will in themselves draw footfall to the centre, the provision of three such units within a relatively small shopping centre indicates there is a lack of demand for these units for their intended retail use. Elsewhere in the Walnuts Centre it is positive that the former Wilko unit has been relet to Poundstretcher.

6.38 The eastern entrance of the shopping centre opens out into a pedestrianised parade and central square which faces onto the Walnuts leisure centre. This area is used to accommodate a small market which consequently assists in drawing footfall to the area. This area also benefits from the provision of a library that appears modern and well used, in conjunction with Orpington College which both help maintain healthy levels of footfall, and a Sainsbury's supermarket, which whilst visually dated, helps draw footfall and appears reasonably well used. The environmental quality of this part of the centre could however be improved as the area is dominated by hardstanding surfaces, creating a somewhat austere environment.

The dated (albeit functional) internal appearance of the existing Walnuts Shopping Centre

Street market outside Sainsbury's / library. It is considered there is scope to improve the public realm in this busy part of the town centre.

<u>Development proposals for the Walnuts Centre</u>

6.39 As we have identified above the Walnuts Centre is currently underperforming, with a limited retail offer and evidence of a number of temporary / non-retail uses in operation, despite the centre being centrally located and historically associated with a relatively prime pitch retail offer. It is likely that the current performance of the centre is interwoven with proposals which are emerging for a comprehensive redevelopment of the centre. The site has previously been the subject of redevelopment proposals in recent years, with an application to redevelop the site comprising 990 apartments, new retail space, a new leisure centre leisure, a daycare centre, and upgrades to the public realm submitted to LBB in January 2022[44]. The application was, however, subsequently withdrawn by the developer Areli in October 2022.

6.40 Revised plans for the redevelopment of the shopping centre were published online in October 2023, and a public engagement exercise was understood to have taken place in November 2023[45]. The redevelopment of the shopping centre is now being promoted by a different developer, Redcliff. The revised proposals only include the shopping centre and excludes the leisure centre and the existing day care centre. It is not yet clear the scale

[44] Application ref. 21/05907/OUT
[45] Source – consultation website https://thewalnutsorpington.co.uk/

of development proposed, however the website for the development proposals acknowledge previous concerns over building heights, indicating that the revised proposal will greatly reduce in height relative to the previous withdrawn scheme. A revised consultation was launched by Redcliff in 2025; the revised proposals now include 450 homes split across three buildings ranging in height between 11 and 19 storeys along with retail space at ground floor level. According to the website, it is proposed that a revised planning application will be submitted in Autumn 2025.

Figure 6.5 Extent of proposed redevelopment of Walnuts Shopping Centre

Map source: https://thewalnutsorpington.co.uk/theplans/

Conclusion

6.41 Our overall view is that Orpington is, for the most part, displaying reasonable levels of vitality and viability. It is considered that the centre meets many day-to-day shopping needs of local residents with three supermarkets found along the High Street. It has a more convenience / day to day-focussed offer than Bromley and has a retail offer pitched towards the lower end of the market. It therefore provides something of a counter-balance to Bromley town centre (and other surrounding larger towns such as Sevenoaks) in this respect. The southern half of the centre in particular appears to be performing well, with good levels of footfall, and a strong anchor store in the form of the Tesco Extra which assists in drawing footfall down the High Street. The northern half of the centre performs noticeably less well, with higher levels of vacant, poorer quality property stock, lower levels of footfall and generally a less attractive overall offer.

6.42 Aside from the foodstores and the Odeon cinema (which is in itself a significant asset to the town centre), the town centre does not contain a significant number of ‘anchor’ stores and the lack of non-food retail anchors in the context of Orpington’s role and function as a ‘major’ town centre is quite noticeable. The lack of these can partly, in our view, be attributed to wider sectoral changes, and for many comparison goods retailers, having representation in a higher order centre such as Bromley is likely to be sufficient from a commercial representation basis given the high proportion of customers who now shop online. However, the presence of the strong-performing Nugent Shopping Park to the north of the town centre is also likely to be a contributory factor, and it is telling that a number of retailers such as Waterstones, Pret and Hotel Chocolat — who would typically be considered ‘town centre’ retailers — prefer to be located at Nugent.

6.43 The contraction of physical retail and competition from Nugent does lend Orpington an air of having an oversupply of retail floorspace, evidenced for example by large footprint units along the High Street being occupied by charity shops, including in some prime locations. The Walnuts Shopping Centre also appears to be suffering from a lack of demand, with non-retail uses occupying a large number of units within the centre. However the leasing of these units may be impacted by proposals to redevelop the shopping centre meaning, for example, that the owners may only be offering temporary / short term leases.

6.44 It is positive to note that there is evidence of recent and planned investment in the centre. The conversion of the former Post Office into an upmarket bar/restaurant introduces a new type of offer to the centre, and the redevelopment of the former Woolworths building next door will introduce modern commercial floorspace and new residential development. If the proposed redevelopment of the Walnuts comes forward, this will introduce further new residential communities (and therefore footfall) into the town centre.

6.45 The environmental quality of the centre is something of a tale of two halves; the southern part of the centre (south of the Homefield Rise junction) feels positive, but the northern part of the centre (past the entrance to the Walnuts) feels less positive, although it is acknowledged that the narrower pavements in this part of the centre limit the options for public realm interventions. More could also be made of the public realm leading from the High Street leading to the Walnuts Leisure Centre/ Odeon to help make this a focal point in the centre, building on an existing strong range of uses in this part of the centre (e.g. the cinema, college, leisure centre, library and Sainsbury's).

Table 6.7 Summary of strengths and weaknesses of Orpington 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.

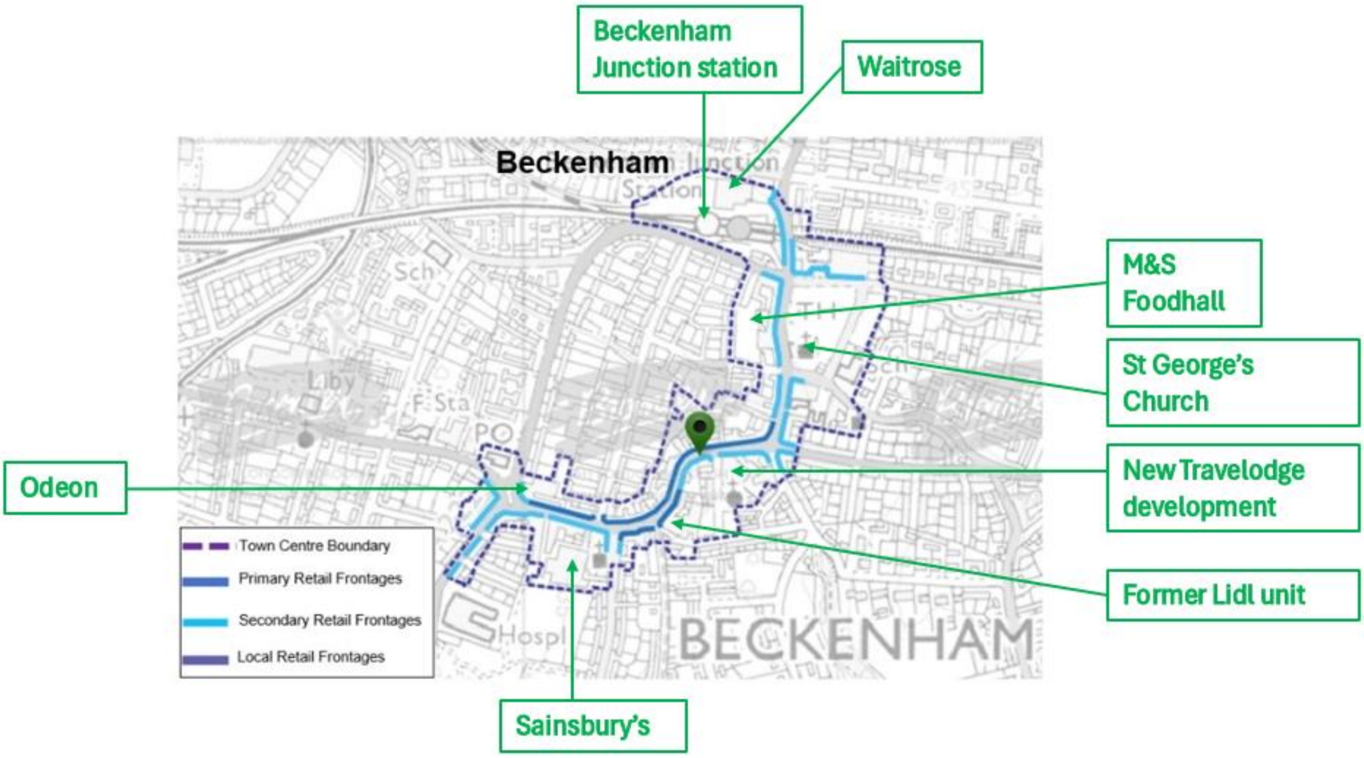
SECTION 7 | TOWN CENTRE HEALTH CHECKS — DISTRICT CENTRES (NORTH WEST OF BOROUGH)

7.1 In this section we set out an assessment of the vitality and viability of the district centres in LBB, focussing on those in the urban north west of the Borough namely **Beckenham, Crystal Palace** and **Penge**. An assessment of the remaining two district centres in the Borough — **Petts Wood** and **West Wickham** — follow in **Section 8.**

Beckenham district centre

7.2 Beckenham is defined as a district centre within the Bromley Local Plan (2019) and is the third largest town within the Borough of Bromley[46]. Beckenham is a linear town centre running along a winding section of Beckenham High Street which hosts a good range of national multiple retailers including large format food retailers such as Sainsbury's, M&S Foodhall and Waitrose. A Lidl store was until recently also located in the centre, however this store closed permanently in December 2023. The town centre has a particularly strong commercial leisure offer, with multiple cafes, restaurants and a cinema, and benefits from having a pleasant and attractive environmental quality, particularly towards its northern end. Beckenham Junction railway station also sits at the northern end of the centre. The primary shopping frontages as currently defined by the Local Plan are found towards the centre of the High Street in a relatively tightly-defined area, with the secondary frontage extending a short distance to the west and a larger extent northwards through the centre (see **Figure 7.1**).

Figure 7.1 Local Plan town centre boundary & retail frontages in Beckenham town centre, annotated with key developments / premises.



Source: LBB Local Plan base map with Firstplan annotations

[46] London Borough of Bromley - https://www.bromley.gov.uk/business/town-centres/3

Diversity of Uses

7.3 The most recent assessment of the diversity of uses of Beckenham town centre is the Experian Goad survey of the town centre, which was undertaken in October 2023. Firstplan undertook site visit to Beckenham town centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses in the town centre based on this survey is shown in **Table 7.1** It shows that the town centre contains 193 units, with retail (comparison and convenience) comprising 73 of these, totalling approximately 37.0% of the total number of units. Regarding the 73 retail units, 24 (12.4%) are in use as convenience goods retailers, standing at approximately 2.0% above the national average. In terms of floorspace, convenience goods retail accounts for 33.4% of total, far greater than the national average of 18.9%, as the result of the three foodstores that are found within the town centre.

7.4 49 of the 73 retail units are occupied by comparison goods retailers, equating to 25.3% which is significantly lower than the national average of 33.5%, which is reflective of Beckenham's role as district centre, and is also likely to be influenced by the close proximity of Bromley town centre approximately 2.5km to the east (and with direct public transport connections/easy accessibility from the Beckenham area).

7.5 Through the central stretch of the High Street (broadly between Sainsbury's and the Kelsey Park Road junction) there are a noticeably large number of units given over to charity shops, which are classified as comparison goods retailers. The proportion of charity shops in the centre is slightly above average (5.1% compared to 4.3% UK average), but the clustering of them in this part of the centre lends a feel of proliferation.

7.6 **Table 7.1** shows that the most prevalent use in the town centre is retail and leisure services, accounting for 53.3% of the total number of units which includes restaurants, cafes, fast food, hairdressing, beauty & health along with banks & financial services and estate agents & auctioneers. Of these, restaurants, cafes and fast food are the most prevalent, comprising 48 units or 24.8% of the total which is 5.9% higher than the national average. The overall services sector is therefore strongly represented in the centre, accounting for over 1 in 2 units in total, standing at 13.5% above the national average. The higher than average presence of retail and leisure services, as well as convenience retail, is considered to be reflective of its overall role and function as a district centre and does not, in our view, represent cause for concern.

7.7 Notwithstanding the below average representation in comparison goods, Beckenham is considered to have a broad mixture of uses and can be considered generally healthy in respect of its overall diversity. Its relative shortfall of comparison goods floorspace is not considered to cause for concern in the context of the role and function of the centre and also having regard to its proximity to Bromley town centre.

Table 7.1 Diversity of uses in Beckenham district centre (Experian Goad October 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	24	12.4	10.1	+2.3
Comparison	49	25.3	33.5	-8.2
Services (Financial and business + leisure services)	103	53.3	39.8	+13.5
Vacant outlets + miscellaneous	15	7.7	15.5	-7.8
TOTAL	193	**100%**	**100%**	**100%**

Source: Experian Goad survey, August 2023

Retailer representation & balance between independent and multiple stores

7.8 Beckenham town centre is anchored by three foodstores; Sainsbury's in the southern section of the town centre, whilst the M&S Foodhall and Waitrose are found towards to the towards the northern section near Beckenham Junction Railway Station. All of the aforementioned supermarkets are supported by dedicated car parks. Other key national retailers include Boots, Argos (within Sainsbury's), WH Smith, Clarks and Superdrug as well as a number of national charity shops, as noted above. The town is also well served by national restaurant operators including Nando's, Pizza Express, Zizzi and Ask Italian, and coffee shops such as Pret, Costa Coffee and Caffé Nero. The South London local chain Blackbird Bakery has recently opened in both Beckenham and Penge district centres. The western end of the centre is bookended by a historic Odeon cinema.

7.9 The Experian Goad survey of Beckenham town centre (August 2023) identified 49 out of the 193 units are occupied by multiple retailers, equivalent to 25.3% of the total. Whilst the national operators certainly feel prominent within the centre (particularly the high number of national restaurant chains), Beckenham's strength is in its independent offer and independents are located throughout both the primary and secondary shopping frontages on the High Street including two butchers, a fishmongers, bookshop, wine shop and a florist, a gift shop and a number of independent cafes and restaurants particularly towards the northern section of the High Street.

7.10 Beckenham benefits from having a strong evening/ night-time economy which can contribute significantly to the overall vitality of a centre and providing it with a sense of purpose outside of retail hours. Alongside the large number of national restaurant operators, there is an established independent restaurant sector throughout the town centre, which further adds to its vitality and can be considered a key strength of the centre. The centre contains seven pubs including an O'Neill's which is a nationally operated chain. In addition, six bars and a nightclub are found with the defined town centre boundary. Other key leisure uses include the aforementioned Odeon cinema at the western end of the town centre. A new Travelodge hotel is currently under construction in the central area of the High Street, close to the junction with Kelsey Park Road.

7.11 A critical consideration to note is the placement of commercial leisure activity throughout the town centre, ranging from the Odeon at the western end, to a number of cafes, pubs and restaurants located throughout the length of the High Street, and a particularly strong café/ restaurant cluster around the High Street / Bromley Road junction. This helps to animate activity along the length of the High Street throughout both the daytime and evening trading periods, making the centre feel both busy and diverse.

Vacant Street Level Property

7.12 In October 2023 when the Experian Goad town centre survey was undertaken, it was recorded that Beckenham had a total of 15 vacant units which equates to approximately 8% which is significantly lower than the UK average of 15.5%. The overall low vacancy rate within the centre can be considered to be a positive reflection on its overall vitality.

7.13 Since the Goad survey was undertaken, the key change in respect of the vacant property stock in the town centre has been the closure of the Lidl supermarket (located on High Street close to its junction with Kelsey Lane. The unit has been acquired by McGrath Properties and, at the time of our site visit in May 2024, had external marketing identifying the unit was "available soon", indicating the developer may be undertaking some internal improvements before seeking new tenants. The unit, which was formerly a Safeway prior to being occupied by Lidl, has a somewhat dated external appearance and a narrow frontage onto the High Street, with the main unit set back behind a covered pedestrian walkway.

7.14 Elsewhere in the centre there has been relatively little change in the retail offer since the Goad survey in October 2023 , although it was noted that the Starbucks store on High Street has closed, and a branch of Lloyds Bank at the junction of High Street and Church Avenue is in the process of being converted to an estate agents. The vacancy rate is slightly more noticeable at the western end of the town centre, with a cluster of three vacant units opposite the Odeon, and a large vacant unit which was previously occupied by Kwik Fit on Croydon Road. At the northern end of the centre there is a prominent vacant unit within a new-build mixed-use scheme on Albemarle Road, on the edge of the town centre, which is a long-standing vacant.

Customers' views and behaviour

7.15 The following section sets out the findings of the household telephone survey in respect of those respondents who stated they visit/use Beckenham district centre.

Frequency of visits

7.16 For those residents who stated they visit Beckenham district centre, the most popular frequency of visit was 'at least once a week' (22.9% of respondents), followed by 'at least once a month' (16.1%). Instances of more frequent usage are relatively low (reflecting a trend seen across the Borough's district centres), with only 7.4% of respondents visiting daily and 10.2% at least two times a week. Overall, 40.4% of respondents therefore visit the district centre at least once a week.

Main purpose of visit

7.17 The most popular reasons for visiting Beckenham district centre were as follows:

- Daytime leisure - e.g. visiting cafes and restaurants (16.4%)
- Food shopping (14.0%)
- Visting friends/relatives who live locally (12.2%)
- Non-food shopping (11.9%)
- Other leisure activity - e.g. cinema, gym (8.7%)

7.18 The above indicates that there are a variety of reasons why residents visit the centre, which is in itself a positive reflection on its overall vitality. The popularity of the café/restaurant offer in the centre is clearly apparent in the survey results, and reinforces the findings elsewhere in this health check assessment that this represents a key strength in the overall offer of the town centre.

Linked trips

7.19 In terms of linked shopping trips, the most popular response was again visiting daytime leisure facilities such as cafes and restaurants (24.4% of respondents) further reinforcing the conclusions above in respect of the significance of this offer to the overall vitality of the centre. Food shopping was the second most popular linked activity (24.1%), following by evening leisure activities (e.g. restaurants, pubs) (15.7%). 24.0% of respondents stated they did not undertake any linked trips alongside their primary reason for visiting.

Likes and dislikes

7.20 When respondents who use Beckenham district centre were asked what they liked about the centre, the most popular responses were as shown in **Table 7.2**. Most tellingly, the survey identified multiple reasons why residents liked the centre, with a total of 15 different attributes each attracting a response of over 10%. Reinforcing the trends discussed above, the most popular response was the choice of places to eat and drink offered by the centre (32.4%), followed by the choice and range of shops (28.2%) and the market in the centre (16.8%). As the town centre itself does not have a regular market, it is likely that the latter response refers to the popular food market which is held every Sunday in nearby Beckenham Place Park.

Table 7.2 Most popular attributes of Beckenham town centre

Rank	Attribute	% of responses
1	Choice of places to eat and drink	32.4%
2	Choice and range of shops	28.2%
3	Good market	16.8%
4	Close to home	16.1%
5	Choice of independent retailers	15.6%
6	Nice atmosphere	15.4%
7	Choice of supermarkets	15.3%
8	Close to friends & relatives	14.5%
9	Easy to get to by car	14.2%
10	Environmental quality of centre	14.2%

Source: NEMS Household Survey. Note, survey question was multi-response.

7.21 In terms of attributes of the district centre that were disliked, it is positive to note that one-third of respondents stated that there was nothing they disliked about the centre. 12.4% identified the lack of choice of choice of non-food shops, and 12.4% identified the lack of choice of food shops; the latter could be a reflection of the recent closure of the Lidl store in the centre, which has meant the remaining convenience offer in the centre (Sainsbury's, Waitrose and M&S) is more towards the premium end.

Pedestrian Flows

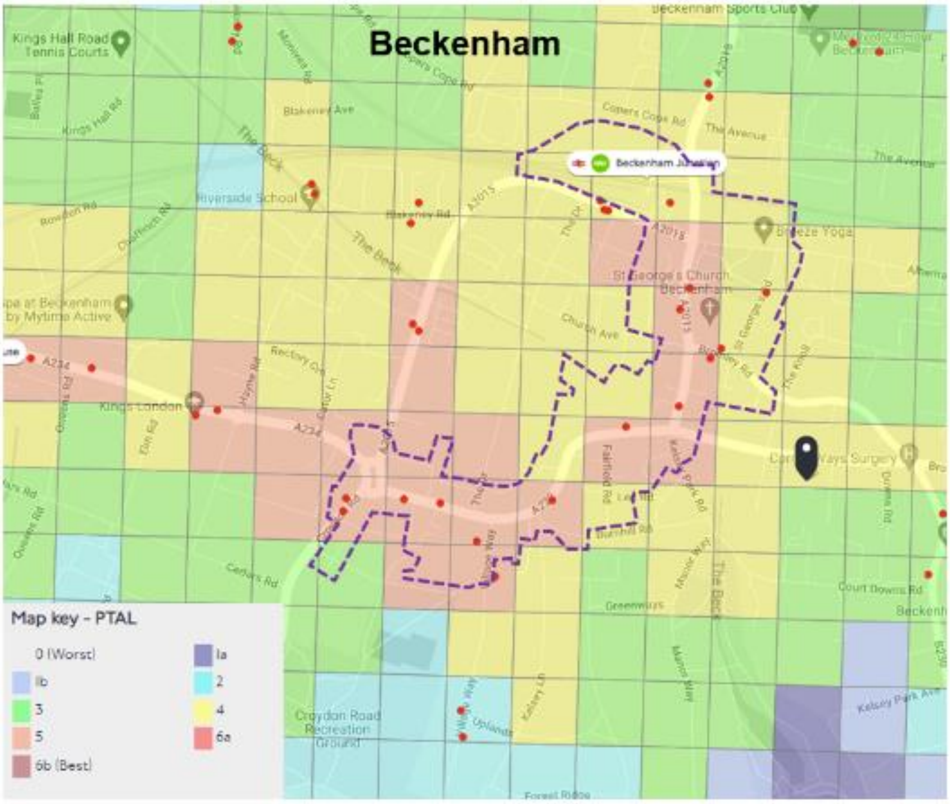
7.22 From our qualitative observations, it is apparent that Beckenham is a busy and well-used district centre. Overall, levels of pedestrian footfall generally appear to improve as one progresses west to east through the centre; the western end (centred on the Odeon / war memorial roundabout) was observed to be quiet, perhaps reflecting the lack of 'anchor' stores in this part of the centre. The Sainsbury's store which sits behind the High Street at this end of the centre was observed to attract some, but not significant, amounts of footfall, and it is possible that many users of this store access by car. Footfall noticeably picks up past the High Street's junction with Fairfield Road, and as it bends north towards its junction with Bromley Road. Here, the combination of some key anchor stores (e.g. the M&S Foodhall), and a number of cafes/ restaurants which have pavement dining lend the centre a noticeable bustle.

7.23 Footfall continues to be strong heading north past M&S towards Beckenham Junction station, but tails off after this point. However, during our visits to the centre evidence of some shoppers walking between the town centre and the Waitrose store to the north were observed, despite the store somewhat 'turning its back' on the centre and being detached from the wider retail offer.

Accessibility

7.24 Beckenham can be considered to benefit from good levels of accessibility through public transport, as shown in **Figure 7.2** the majority of the defined district centre has a PTAL rating of 6a, representing excellent access to public transport. Beckenham Junction Railway Station is located towards the northern end of the High Street, providing services to London Victoria every 30 minutes and services to Bromley South, Penge and Orpington every 30 minutes as well as services to London Bridge and Crystal Palace. Adjacent to the railway station lies Beckenham Junction Tram Station, which is the terminus of the northeastern section of the wider London Tramlink network. The tram station provides connections to East & West Croydon and Wimbledon amongst others, operating every 10 minutes.

Figure 7.2 PTAL map for Beckenham town centre (annotated to show town centre boundary)



Base map source: Transport for London. Note – bus stops denoted by red dots.

Figure 7.3 Car parking provision around Beckenham town centre

Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Beckenham town centre

7.25 The town centre is also served by a number of bus routes. Heading southwards, the 367 service which operates every 20 minutes, provides connections to Croydon Town Centre. In addition, the 194 service to West Croydon operates every 9 to13 minutes. Towards Bromley to the east, the 227, 354 and 358 services each operate every 10 to 15 minutes. To the west, the 358 and 227 services provide connections to Crystal Palace and Penge in 10 to15 minute intervals. To the north, the 54 service provides connections to Woolwich and Lewisham every 10 minutes, with buses in the opposite direction terminating at nearby Elmers End. Bus stops are located throughout the centre, providing immediate access to nearby retail outlets.

7.26 Beckenham also benefits from having a number of car parks that are found in and around the town centre. A Council operated car park is located in the northern section of the centre and two further car parks that are owned by the council are found in the southern section of the centre, at a cost of £1.60 for a two hour stay. In addition, free customer parking is provided by the aforementioned supermarkets including Sainsbury's, Waitrose and M&S Foodhall.

Perception of Safety and Occurrence of Crime

7.27 In reference to data published by London Metropolitan Police and as shown in **Table 7.3**, a total of 283 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was violence and sexual offences. Across the 6 month period, the number of offences recorded ranged from 74 in April 2024 to 25 in January 2024.

Table 7.3 Crime statistics for Beckenham town centre, November 2023 – April 2024

Beckenham	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	1	5	3	12	12	11	**44**
Burglary	3	1	0	2	4	2	**12**
Criminal Damage and Arson	1	4	3	1	0	0	**9**
Drugs	3	2	1	0	0	2	**8**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	4	2	1	1	1	3	**12**
Shoplifting	12	0	4	10	11	22	**59**
Theft	10	8	8	0	5	8	**39**
Vehicle Crime	2	4	0	1	0	1	**8**
Violence and Sexual Offences	9	22	5	2	18	11	**67**
other crime	0	0	0	1	10	14	**25**
Total	**45**	**48**	**25**	**30**	**61**	**74**	**283**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

7.28 Overall, Beckenham district centre benefits from good levels of environmental quality. The town centre contains a number of listed buildings, including the Odeon cinema at the western end of the town centre, the George Inn on High Street and a brace of listed buildings around Beckenham Green including St George's Church and a clutch of other buildings in the vicinity of this. The Beckenham Town Centre Conservation Area which was formerly adopted in 2015 also covers the majority of the designated town centre area, as shown in Figure 7.4.

7.29 Indeed, this latter area – focussed on the church, Beckenham Green, and High Street / Bromley Road junction – is where the environmental quality of the centre can be considered at its strongest, with the elevational change as the road climbs towards the Green providing the opportunity for buildings on the eastern side of the High Street to benefit from a prominent, elevated position over the road. The buildings currently occupied by the ASK Italian and Papilo Restaurants (Bromley Road and High Street respectively) make a particularly positive contribution to the street scene in this respect. Beckenham Green itself is a pleasant and well-maintained open space.

7.30 Moving further north towards Beckenham Junction station the overall environmental quality of the centre deteriorates, with the High Street / Rectory Road junction a busy intersection, and a new build residential development with ground floor commercial not making an especially positive contribution to the centre. Southend Road, at the northern end of the centre, has poor environmental quality, with a dated single storey parade of retail units on its western side. The Waitrose store to the north of this means that this area has high levels of both vehicular and pedestrian movements.

Figure 7.4 Heritage assets in Beckenham district centre

Source: Historic England base map with Firstplan annotations. Annotated to show policy boundary of district centre, Conservation Area boundary and key heritage assets.

7.31 Elsewhere in the town centre, the environmental quality can be considered reasonable, although the western end has a number of dated buildings around the war memorial junction which make little contribution to the overall offer of the centre. The Odeon, whilst listed and unquestionably of significant positive architectural merit particularly as a ‘gateway’ to the town centre when arriving from the Penge / Elmers End direction, appears unloved and in need of investment by its owners to smarten up its facade.

7.32 As with many other centres in the Borough, the main compromise to environmental quality in the centre is traffic, which has a tendency to get congested along the snaked section of the High Street, although from our observations at the site visit it is not as noticeable as some of the Borough’s other centres. Congestion was noted to be apparent at the main junctions either end of the centre however – the war memorial roundabout to the west and the High Street / Rectory Road / Southend Road junction to the north.

7.33 Aside from the aforementioned Beckenham Green, there are two other large green spaces – Kelsey Park and Beckenham Place Park – both of which are within walking distance of the town centre. Kelsey Park is an attractive linear park that runs southwards away from the town centre, almost abutting its southern boundary. Beckenham Place Park (which falls within the boundary of LB Lewisham) is a longer walk (10-15 mins) but is frequently used for special events and there may be scope to explore enhancing wayfinding linkages between both parks and the town centre to enable the town centre to benefit from additional inflow from visitors and those less familiar with the area.

The listed Odeon cinema at the western end of the centre forms a visually attractive gateway but is in need of investment

Historic premises on High Street make a positive contribution to the overall environmental quality of the centre

New Travelodge hotel under construction on High Street

Conclusion

7.34 We consider that Beckenham district centre benefits from good levels of vitality and viability. Along with Chislehurst (local centre, discussion in Section 9), it is probably the upmarket location of the Borough's centres and the nature of the offer present in the centre suggests the centre primarily serves a fairly affluent catchment. The M&S and Waitrose stores in the centre are both quality, modern foodstores, although the Sainsbury's in the western end of the centre appears more dated and was noticeably less busy. The recent closure of Lidl is unfortunate, but to date does not appear to have significant impacted on the overall vitality of the centre. The centre has a strong daytime and evening café and restaurant culture, arguably stronger than that of the much larger Bromley town centre nearby. The western end of the centre does, however, need smartening up, and there appear to be possible issues of low operator demand given the large number of charity shops filling the central stretch of the High Street.

Table 7.4 Summary of strengths and weaknesses of Beckenham district centre

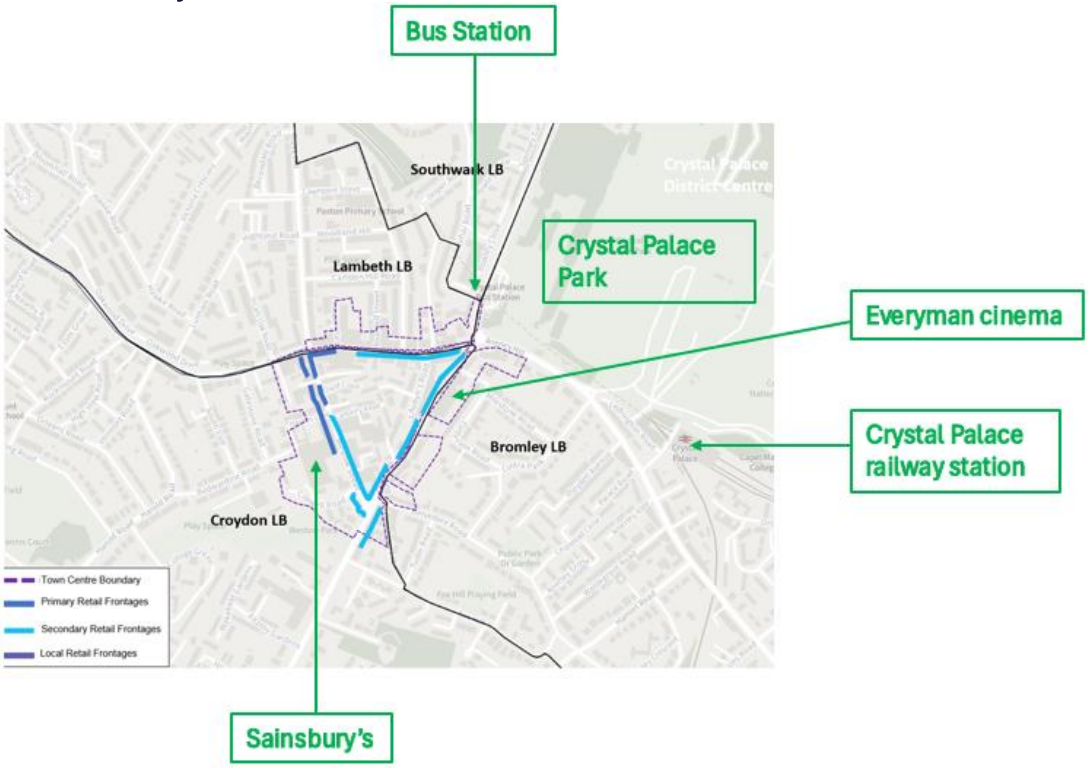
Strengths	Weaknesses
• High quality foodstore anchors • Strong evening economy / café culture • Attractive setting • Well connected • Green spaces within and close to centre • Evidence of recent investment, e.g. Travelodge site	• Proliferation of charity shops along central stretch of High Street • Some congestion issues particularly at periphery • Loss of Lidl has reduced breadth of convenience offer • Investment in some heritage assets e.g. Odeon required

Crystal Palace district centre

7.35 **Crystal Palace** is located approximately 7km to the west of Bromley town centre. The district centre is laid out across three key frontages along Westow Hill, Westow Street and Church Road. Only a small part of the district centre falls within the administrative boundary of LBB — the eastern side of Church Road — with the majority of the centre falling within LB Croydon and part (northern side of Westow Hill) within LB Lambeth. For the purposes of this assessment we have, however, considered the performance, role and function of the centre as whole, irrespective of the extent of administrative boundaries. **Figure 7.5** shows the extent of the district centre which falls within the boundary of LBB, but is annotated to show the wider extent of the district centre boundary (including primary and secondary shopping frontages) as adopted by the neighbouring boroughs.

7.36 The area comprising Westow Hill, Westow Street and Church Road is broadly referred to as 'The Triangle' and is the focus for the majority of the retail and commercial activity within the centre. In broad terms, the centre comprises a mixture of day to day shopping, more specialist gift shops and boutiques, and a noticeably strong food & beverage offer. The centre is also known as destination for vintage/antique shopping, with a concentration of units selling these items along Church Road. Key anchors in the centre include a small Sainsbury's supermarket on Westow Street, and an Everyman Cinema on Church Road, which represents a new addition to the centre subsequent to the Council's previous retail study.

Figure 7.5 Annotated hybrid map of town centre boundaries, frontages, LPA boundaries and key facilities in Crystal Palace district centre



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses

7.37 The most recent assessment of the diversity of uses of Crystal Palace district centre is the Experian Goad survey, which was undertaken in May 2023[47]. Firstplan undertook site visit to Crystal Palace town centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses in the centre is shown in **Table 7.5.** It shows that the centre falls broadly in line with national averages in terms of comparison and convenience goods representation. A total of 17 convenience goods outlets are found within the centre, comprising 9.1%, compared to the national average of 10.1%. The Experian Goad survey identified 57 comparison goods outlets within the centre, equating to 30.5% of the total number of units, whereas the national average is 33.5%. Within the comparison goods category, the district centre contains

[47] Experian Goad refer to the centre as 'Upper Norwood', which reflects the name given to the centre in the LB Croydon Local Plan. The Goad boundary extends across all three LPA areas which cover the centre.

a good number of DIY, hardware & household goods stores (6 units) along with charity, pets & other comparison stores (10 units) both of which are 1% higher than national averages.

7.38 For the services sector, the district centre is also well represented, with a total of 86 units found within the town centre, standing at more than 6.3% of the national average, reflecting the aforementioned strong food & beverage offer in the centre. The majority the services sector is comprised of restaurants, cafes and fast food units, with a total of 46 units which equates to 5.6% higher than the national average. The second most common service type was hairdressing, beauty & health with a total of 27 units which falls broadly in line with the national average in percentages terms. An identified deficiency within Crystal Palace is the lack of banks & financial services with none found within the district centre, although such a trend is increasingly not untypical for centres the size of Crystal Palace. There are ATM facilities in the centre associated with the Sainsbury's store.

7.39 Overall the mix of uses in the district centre when assessed against UK averages does not present a cause for concern, and indeed reflects the direction which many town centres (particularly of this size) have taken in recent years as retail demand has decreased.

Table 7.5 Diversity of uses in Crystal Palace district centre (Experian Goad March 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	17	9.1	10.1	-1.0
Comparison	57	30.5	33.5	-3.0
Services (Financial and business + leisure services)	86	46.0	39.8	+6.2
Vacant outlets + miscellaneous	25	13.4	15.5	-2.1
TOTAL	**187**	**100%**	**100%**	**100%**

Source: Experian Goad survey, March 2023

Retailer Representation and balance between national & independent retailers

7.40 As noted above, the district centre is anchored by a small Sainsbury's supermarket located on Westow Street. The supermarket (and associated other retail units on the southern side of Westow Street) has somewhat dated appearance externally but internally has benefited from a recent internal refurbishment. The supermarket has a multi-storey car park to the rear, suggesting it caters for a mixture of top-up and main food shopping. The central location of Sainsbury's within the centre and its role as the clear anchor within the centre means it can be expected to support a good degree of linked shopping trips with other retailers and services in the centre.

7.41 There are no other significant retail anchors within the centre, with the possible exception of the small Iceland store on Westow Hill, although this appears relatively lightly used in comparison to Sainsbury's. The convenience offer is also strengthened by small Co-Op and Budgens supermarkets on Central Hill and Westow Hill respectively.

7.42 Of the 187 units which make up the district centre, 20 units were occupied by national multiple retailers comprising just 11% of the total number of units, which is notably lower than the UK average of 21.5%. Whilst Crystal Palace may lack representation from national retailers, it benefits from a good variety of independent operators including a variety of restaurants, cafes, clothing stores and specialist stores such as antique shops and art galleries, and this strong diversity of independent retail and leisure sector is considered a key contributor to its overall vitality.

7.43 Other national retailers present in the centre include Poundstretcher (household goods), Poundstretcher (variety / household goods) and Savers (health & beauty). There are no other national comparison goods retailers present in the centre with the exception of charity shops (RSPCA, Shelter, Cancer Research UK etc). The diversity of uses analysis set out above has identified the presence of an above-average number of charity shops within the centre, although from our site visits it was noted that a number of these present a curated 'boutique' look and carry a range of relatively premium products. Elsewhere within the centre, the focus of the comparison goods offer is a mixture of specialist retailers and gift boutiques – examples include Simon Carter (menswear), Elkins (homewares/gifts), Mrs Robinson (furniture/homewares), The Vaults Collective (a plant shop with a café), Love Bridal (bridalwear shop), as well as a number of hardware shops, a health foods shop, and a picture framers.

7.44 There are no national restaurant / food & beverage retailers present within the centre, with the exception of a Caffe Nero coffee shop on Westow Hill, and take-away franchises such as Morley's and Chicken Cottage. However, the centre has an extensive independent food & beverage offer, and this can be considered a particular strength to the overall health and vitality of the centre. There are a good number of pubs within the centre, anchoring each corner of the Triangle — Westow House, The Alma and The Sparrowhawk. There are also a large number of restaurants, including Urban Orient (Vietnamese), Tofu (Pan-Asian), Palazzo (Italian), Tamang Thai, Lorenzo (Italian) and Four Hundred Rabbits (pizza). The centre therefore can be considered to have a good evening economy. There is evidence of a number of new openings in recent months around the Westow Hill / Church Road junction including Cocos bar/restaurant, Hopscotch Taproom, Fu Ko fusion restaurant and Alessandro's restaurant all opening. Other restaurants such as 65 Westow and The Sourcing Table represent relatively recent additions to this part of the town centre.

7.45 The town centre also has a strong 'café culture' which is fostered by the presence of a number of independent coffee shops including Roasted Bean, Four Boroughs, Blackbird (a small chain with branches across south London) and Etude Coffee. The coffee shops appear busy and well-supported by local residents and evidently make a positive contribution to the overall vitality of the centre.

Vacant Street Level Property

7.46 The Experian Goad Survey of Crystal Palace Town Centre (March 2023) identified 25 vacant units, comprising 13.4% of the total number of units found within the district centre which falls below the UK average of 15.5%. There are, however, three prominent locations for vacant units within the centre which negatively impact on its overall environmental quality:

- Firstly, there is a prominent, long-standing vacant site[48] next to the Everyman Cinema which remains behind hoardings which attract a considerable amount of graffiti. Because of the wide frontage this site has to the road its vacancy is quite prominent. This site falls within the LBB-demised part of the district centre.
- On Westow Street, a former Wetherspoons pub has been vacant since the company exited the premises a couple of years ago. An adjacent premises, most recently used as a vintage clothes shop and a bar, is also a prominent vacant unit, with a presence on the street scene unfortunately amplified by its bright external colour palette. This site falls within the LB Croydon-demised part of the district centre.
- At the junction of Westow Hill and Anerley Hill is a further large vacant site which was previously a public house. Again, the site sits behind hoardings, and given the prominence of the site as a gateway into the town centre when approaching from the bus/rail stations and the park, securing a positive reuse of this site should be considered a priority. It is understood that the site was put up for sale in August 2024. This site falls within the LBB-demised part of the district centre.

[48] There is extant permission at nos. 37-41 Church Road for redevelopment to provide a residential scheme (LBB application ref.19/00202/FULL1); as well as a recent withdrawn application at the Land outside 27-35 Church Road for mixed-use development (LBB application ref. 22/00033/FULL1).

7.47 Elsewhere in the centre there has been relatively little change in the vacant units since the Experian Goad survey was undertaken, with most units vacant at the time of the centre remaining vacant at the time of our site visit. A prominent unit at the junction of Central Hill and Westow Street following the vacation of the previous occupier, Do South, an interiors shop / design showroom, remains vacant. Other vacant units in the centre are typically small units on the edges of the centre; overall we consider the current level of retail vacancy within the centre to be acceptable but it is amongst the highest in the Borough and, on this basis, does need to be closely monitored.

Customers' views and behaviour

7.48 The following section sets out the findings of the household telephone survey in respect of those respondents who stated they visit/use Crystal Palace district centre.

Frequency of visit

7.49 26.1% of respondents who use Crystal Palace district centre stated they visit at least once a week; a further 14.0% visit at least twice a week and 8.4% stated they visit daily. Combined, this means that 48.4% of respondents who use the centre visit at least once a week - the highest proportion of any of the Borough's district centres. A further 8.6% stated they visit at least once a fortnight, and 18.3% at least once a month.

Main purpose of visit

7.50 The main purpose of visiting the district centre was food shopping (18.4% of respondents who stated they use the centre), followed by 10.6% who visit for a daytime leisure activity e.g. visiting cafes/restaurants, and 9.7% who stated they visit family/relatives locally. Only 6.1% of respondents stated they visit the centre for non-food shopping, the lowest proportion of any district centre, and likely reflective of the fact that the non-food offer of the district centre is mostly geared towards specialist shopping such as homewares and vintage/ antiques. Despite the presence of a cinema in the district centre, only 7.8% of respondents identified this as being the main purpose of visiting Crystal Palace.

Table 7.6 Main purpose of visit to Crystal Palace town centre (household survey respondents)

Rank	Main purpose of visit — Crystal Palace	% of responses
1	Purchasing food shopping (not click & collect)	18.4%
2	Daytime leisure activity e.g. visiting cafes, restaurants	10.6%
3	Visiting friends / relatives who live in the town centre	9.7%
4	Other leisure activity e.g. visiting cinema, gym, leisure centre	7.7%
5	Evening leisure activity e.g. visiting restaurants, pubs, bars	7.5%

Source: household survey results

Linked trips

7.51 However, undertaking non-food shopping was identified as a popular 'linked' activity for users of the centre, with 21.0% of respondents stating that they also undertake this as a linked activity. In other words, whilst non-food shopping is not a main driver of visits in its own right, it is an important secondary contributor to the overall offer of the centre. In terms of other linked activities, 22.1% states they visited daytime leisure facilities, 15.3% stated they visit evening leisure facilities (pubs and restaurants), 10.9% visit other leisure activities such as the cinema, and 10.1% undertake food shopping.

Likes and dislikes

7.52 The attributes most respondents liked about the district centre are summarised in **Table 7.7** below. It shows that most respondents value the choice of places to eat and drink in the centre, a positive identified by almost one-third of respondents (32.2%); other key attributes include the centre being close to home, the choice and range of shops, and the nice atmosphere of the centre.

7.53 In terms of dislikes, by some distance the key factor which users of the centre identified was traffic congestion (23.7% of respondents); Crystal Palace is the only district centre where traffic congestion polled a significant response, and in all other district centres this was rated as a concern by under 5% of respondents. This supports our analysis set out below which identifies traffic congestion as a critical factor which compromises the overall vitality and viability of the centre. A further 10.9% of respondents separately highlighted the one-way system / road layout as a factor they disliked about the centre. 9.3% of respondents also identified the centre as having a 'poor atmosphere', which may also be related to the congestion constraints.

7.54 Other attributes which respondents of the centre disliked polled lower levels of response, but included early closure of shops in the centre (11.4%), and poor security / not feeling safe in the centre (10.5%); in respect of the latter, Crystal Palace was the only centre for which this attribute received a response above 0%. Additionally, 9.1% of respondents stated there was insufficient parking in the centre and 8.9% said parking was poorly located within the centre; both of these represent challenges given the location and topography of the centre. Positively however, 20.7% of respondents stated that there was nothing they disliked about the centre.

Table 7.7 likes and dislikes of Crystal town centre (household survey respondents)

Rank	Attribute – most liked (Crystal Palace)	% of responses	Attribute – most disliked (Crystal Palace)	% of responses
1	Choice of places to eat & drink	32.2%	Traffic congestion	23.7%
2	Close to home	26.8%	Nothing	20.7%
3	Choice and range of shops	22.4%	Shops don't open late	11.4%
4	Nice atmosphere	22.3%	One way system / road layout	10.9%
5	Environmental quality	18.6%	Poor security / don't feel safe	10.4%
6	Choice of independent retailers	16.8%	Poor atmosphere	9.3%
7	Close to friends/ relatives	13.1%	Not enough parking spaces	9.1%
8	Familiar / know where everything is	12.6%	Inconveniently located parking	8.9%
9	Choice of supermarkets	12.4%	Lack of choice of independent retail	8.1%
10	Inexpensive	10.9%	Lack of choice of leisure facilities	6.1%

Source: household survey results

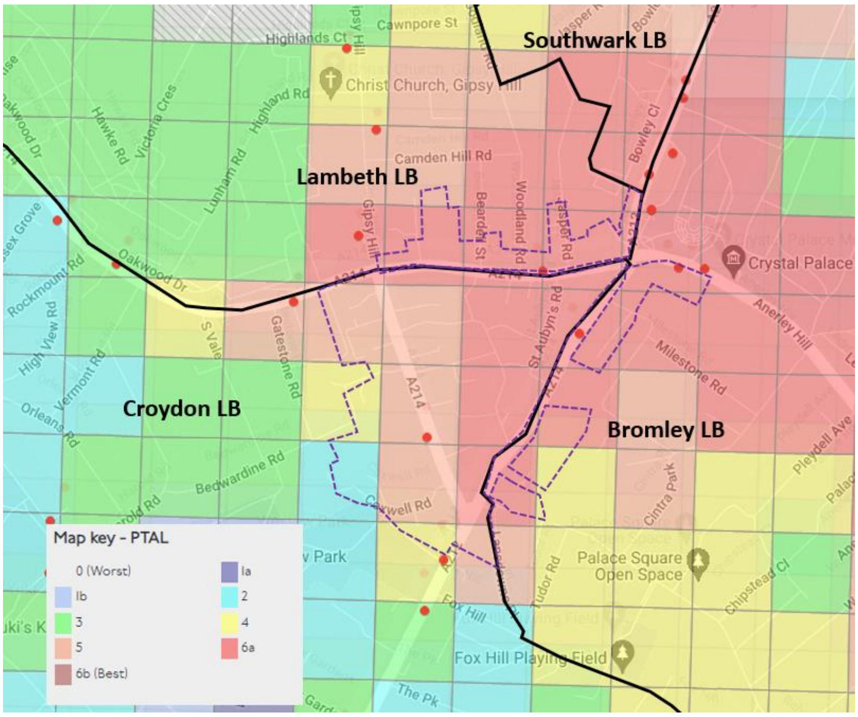
Pedestrian Flows

7.55 Evidence from our site visits suggests Crystal Palace is a busy and popular district centre, performing an important role for the community. Our visits observed good levels of footfall particularly along Westow Street and Westow Hill, with Church Road forming the quieter of the three sides of the Triangle. The Sainsburys store on Westow Street forms the clear anchor to the town centre, and was the area where the centre felt at its busiest, aided further by the well-used bus stop outside. The Westow Hill / Anerley Hill junction also has high levels of footfall associated with people connecting to / from the travel interchanges and the park, and the small Budgens store close to this junction also appears to attract good levels of footfall. Cafes throughout the town centre appeared busy and well-used. Overall, the centre has a clear noticeable 'bustle' during the daytime, indicating a well-used local town centre.

Accessibility

7.56 Crystal Palace is considered to be generally accessible via public transport, as shown in **Figure 7.6,** the majority of the town centre has a PTAL rating of 5 or 6a, indicating good to excellent levels of public transport provision. Crystal Palace Railway Station is located approximately 400m to the east of the town centre and is part of both the London Overground and wider National Rail network. Regarding the London Overground, services from Crystal Palace to Highbury & Islington operate via New Cross Gate and Shoreditch every 15 minutes. National Rail services operate on the 'South London Loop' linking London Bridge and London Victoria via New Cross Gate, Forest Hill, West Norwood, Balham and Clapham Junction, and these services run every 30 minutes during the daytime. Additional services to London Victoria via Streatham Hill also operate, with these services also extending to Norwood Junction and West Croydon.

Figure 7.6 PTAL map for Crystal Palace district centre (annotated to show district centre boundary)



Base map source: Transport for London. Note – bus stops denoted by red dots. District centre boundary is a combination of boundary definitions by LBB, LB Croydon and LB Southwark and is approximate.

7.57 The centre is served by several bus routes and the bus terminus to the north of the centre on Crystal Palace Parade to the north of the town centre means Crystal Place is the start / terminus point for a number of bus routes. Fewer routes run through the Triangle itself, however the 249 (Clapham to Anerley via Streatham), 417 (Crystal Palace to Clapham via Streatham Hill), 432 (Brixton to Anerley via West Norwood) and 410 (Lower Sydenham to West Croydon) all route through the centre. Further services running from the aforementioned bus interchange include the following, with routes generally running at a frequency of every 15 minutes or greater during the daytime:

- route 3 (Crystal Palace to Victoria via West Dulwich and Brixton),
- route 157 (Crystal Palace to Morden via Croydon)
- route 202 (Crystal Palace to Blackheath via Catford),

- route 227 (Crystal Palace to Bromley North via Penge and Beckenham)
- route 358 (Crystal Palace to Orpington via Beckenham and Bromley); and
- route 363 (Crystal Palace to Elephant & Castle via Peckham)

7.58 Crystal Palace lacks the provision of multiple car parks in and around the town centre. The only car park in the district centre comprises the dedicated Sainsbury's car park which provides free parking up to two hours for customers. There are other car parks outside the centre boundary, e.g. serving the Park and National Sports Centre, but these are a reasonable walk from the centre via the steep Anerley Hill. Much of the remaining demand for car parking is therefore likely to be met by the residential side streets which spur off the Triangle.

Perception of safety and occurrence of crime

7.59 In reference to data published by London Metropolitan Police and as shown in **Table 7.8,** a total of 179 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was violence and sexual offences and anti-social behaviour. Across the last 6 months the number of offences recorded ranged from 38 offences in December 2023 to 22 in April 2024. Anti-social behaviour and violence and sexual offences are a serious concern for the centre.

Table 7.8 Crime statistics for Crystal Palace town centre, November 2023 – April 2024

Crystal Palace	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	10	8	11	8	6	4	**47**
Burglary	1	3	7	2	2	1	**16**
Criminal Damage and Arson	0	2	2	2	0	0	**6**
Drugs	0	3	0	0	0	0	**3**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	0	0	0	2	1	0	**3**
Shoplifting	0	2	2	2	2	4	**12**
Theft	6	5	2	4	2	4	**23**
Vehicle Crime	1	1	1	0	0	3	**6**
Violence and Sexual Offences	13	10	4	7	11	5	**50**
other crime	1	4	2	4	1	1	**13**
Total	**32**	**38**	**31**	**31**	**25**	**22**	**179**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

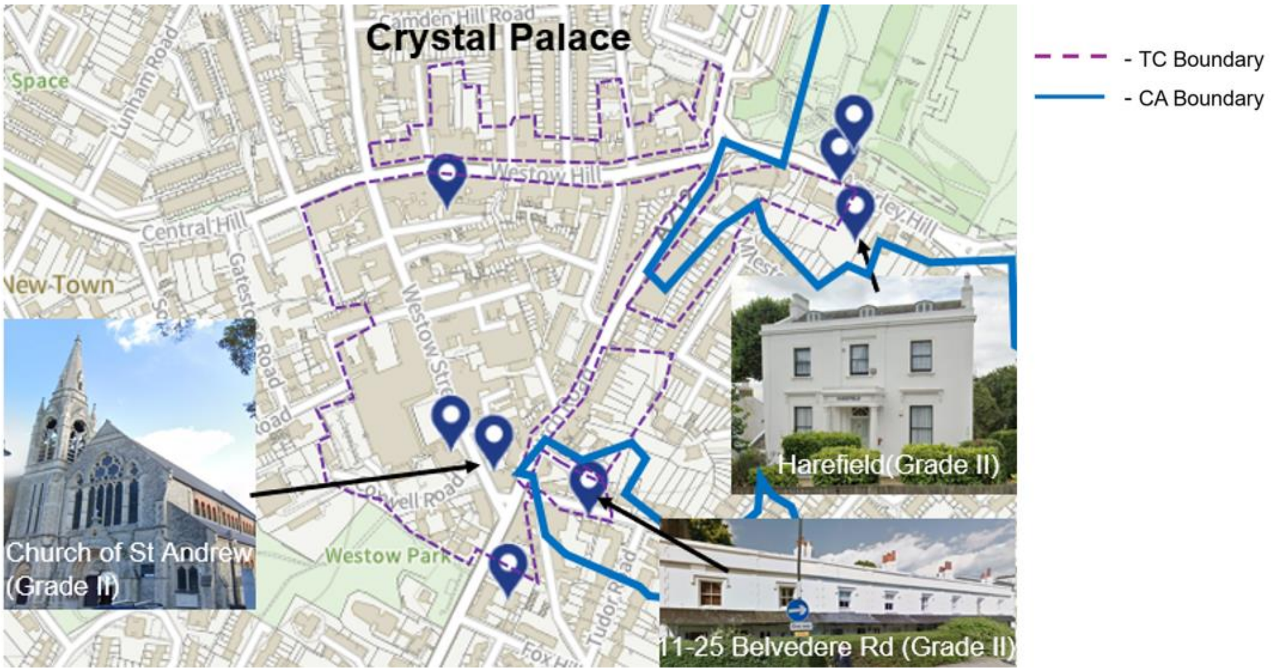
7.60 Crystal Palace town centre has some attractive aspects to its environmental quality; the Everyman Cinema on Church Road, the Westow House pub on the Church Road / Westow Hill junction, and the cluster of buildings at the western end of the town centre around The Alma pub all make particularly positive contributions to the town centre. There are a number of listed buildings largely at the peripheral areas of the centre, with the imposing Church of St Andrew (Grade II listed) making a positive contribution to the environmental quality along the southern part of Westow Street (**Figure 7.7**). Two Conservation Areas cover part of the centre, including the Belvedere Road, Anerley Conservation Area, formerly adopted in 2022, covering the lower portion of Church

Road whilst the Crystal Palace Park Conservation Area, which was formerly adopted in 2022 covers the northern section of Church Road and Anerley Hill. However, neither Conservation Area boundary covers a significant portion of the commercial area of the district centre.

7.61 Generally, the quality of the built environment is positive; the units are mostly historic and well looked after, although there is variance in the maintenance and upkeep of some units along Westow Hill in particular and, whilst outside the boundary of LBB, it is considered that the Westow Hill side of the Triangle is the one most in need of 'smartening up'. The views of the London skyline visible from roads leading down from Westow Hill further enhance the setting of the centre.

7.62 The pavements in much of the town centre are relatively narrow and this can cause issues in terms of ease of pedestrian movement, particularly when bins or other street furniture is on the pavement. Overall the centre has quite a historic and somewhat bohemian feel which contributes to its overall attractiveness. The older buildings are punctuated by some more recent additions such as the 1980s-built Sainsbury's complex which adds little to the overall quality in this part of the centre. For the most part though, the quality of the built environment can be considered good.

Figure 7.7 Heritage assets in Crystal Palace district centre



Source: Historic England base map with Firstplan annotations. Annotated to show policy boundary of district centre, Conservation Area boundaries and key heritage assets.

7.63 The principal drawback to the environmental quality of the centre is the traffic congestion that appears to affect the centre during the daytime. The three sides to the Triangle all form part of a one-way system; some of the traffic appears to be through-traffic, reflecting the fact that aside from the South Circular routing via Crystal Palace is one of the main ways of travelling by car between south east and south west London. Congestion is exacerbated by much of the parking in the centre being on-street, meaning that delays occur whilst shoppers reverse into parking spaces. A number of bus routes run through the centre as noted above, which add to the congestion though are of course necessary. Some of the bus routes appear to be moving towards electric vehicles which will assist in reducing vehicular emissions in the centre. Realistically, there is not likely to be a clear solution to these congestion issues, and care needs to be taken not to compromise the viability of local businesses who may rely on an element of customer visits by car. However, the Council should seek to work with the other LPAs who cover the district centre, and partner authorities such as TfL, to explore whether any potential solutions may exist to reduce the extent of congestion in the centre.

7.64 The town centre benefits from easy linkages to the popular Crystal Palace Park to the north-east of the centre, via the crossing points at the Westow Hill / Church Road junction, although the busy nature of this junction leads to somewhat convoluted pedestrian crossing arrangements. Better wayfinding to the park and rail and bus stations from within the town centre may be helpful for visitors. More clear routing through the park itself from the Crystal Palace end towards some of the park's key features and attractions (many of which are at the furthest point from the town centre within the park) would also be considered helpful. The upcoming opening of the Crystal Palace Subway will deliver an important heritage asset to the doorstep of the town centre, and again presents an opportunity for enhancement of linkages and wayfinding to/ from the town centre to enable potential spin-off benefits to be captured. Overall, it is considered there is a clear opportunity to 'join up' all of these local assets to provide benefits to both users of the park and of the district centre.

Heavy traffic congestion along Church Road

Everyman Cinema on Church Road

The former Grape & Grain public house site at the junction of Anerley Hill and Church Road (within LBB part of the centre) forms a key opportunity site within the centre.

Conclusions

7.65 Crystal Palace is a somewhat unique district centre due to it being at the confluence of a number of authority boundaries and this does mean that it slightly lacks a sense of coherence in places. A joined up approach to placemaking throughout the centre is important. Nevertheless, it performs largely well and particularly so as a visitor destination, with its unique range of boutiques accompanied by a strong leisure offer, and the key asset of Crystal Palace Park — to be subject of significant investment and regeneration in the coming years — on the doorstep. This means that the centre serves as much as a local shopping destination for residents as something of a visitor destination, particularly on weekends. The Sainsbury's foodstore is a good anchor to the retail offer. However, despite its evident popularity and success, there is a relatively high level of vacancy and key vacant units and sites in the centre have struggled to come forward for a number of years. These sites are visually prominent and do bring down the overall feel of the centre. The other key drawback to the centre's overall viability is the constant traffic congestion during daytime trading hours, although the scope for this to change is considered limited.

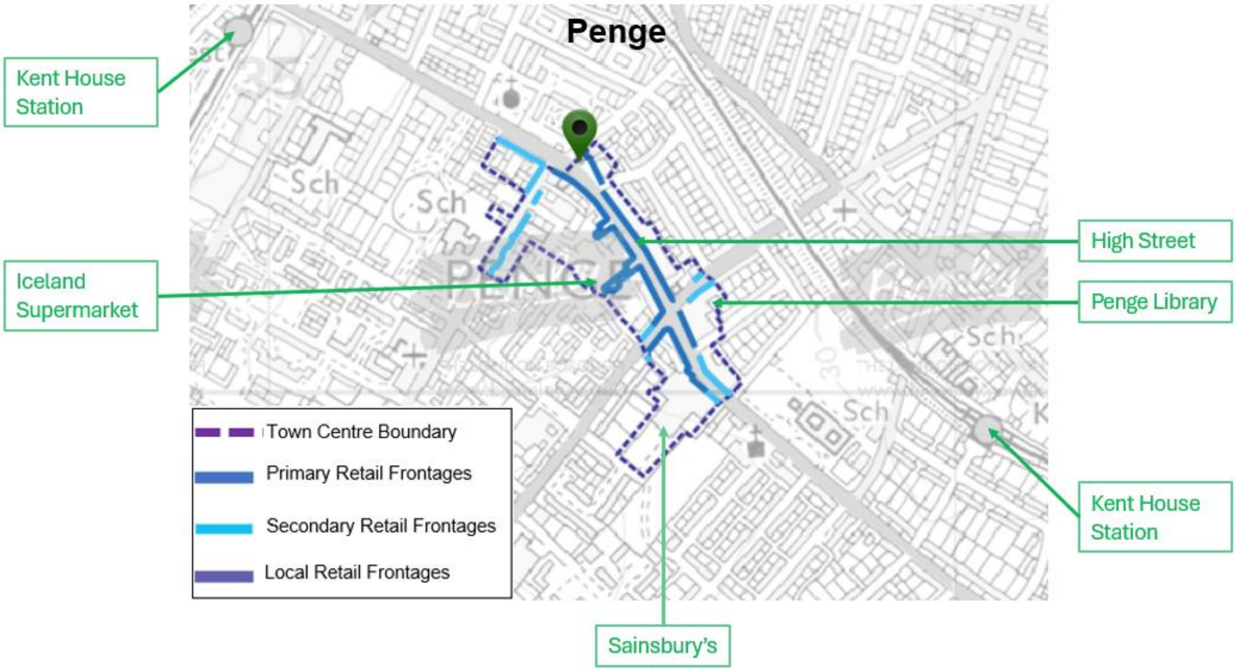
Table 7.9 Summary of strengths and weaknesses of Crystal Palace district centre

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

7.66 Penge is a district centre located approximately 5km west of Bromley town centre and sitting between Beckenham district to the east and Crystal Palace to the north-west. Penge is a linear centre primarily focused upon Penge High Street (A234), whilst primary and secondary frontages are also found along Green Lane (A213) and Maple Road. The district centre is anchored by a Sainsbury's and an Iceland supermarket. Other national multiple retailers include a Boots pharmacy and a large Poundland store.

Figure 7.8 Local Plan town centre boundary & retail frontages in Penge town centre, annotated with key developments / premises.



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses

7.67 The most recent Experian Goad data for Penge was surveyed in September 2023 which provides an assessment of the current mix of retail and services uses in the town centre. Firstplan undertook site visit to Penge town centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. The diversity of uses within Penge is summarised in **Table 7.10** and shows there is a total of 146 units within the boundary of the district centre. In terms of convenience goods, a total 24 units (16.4%) are occupied by convenience goods retailers which is nearly 6.3 percentage points higher than the national average which is driven by the high number of groceries & frozen food stores (8 units) along with butchers (4 units).

7.68 For comparison goods representation, Penge contains 37 such units (25.3%) which is lower than the national average of 33.5%. The under representation of comparison goods is largely driven by a lack clothing stores with just one mixed & general clothing store found along the High Street. It is however not uncommon for these uses to be underrepresented in a district-level centre. Notwithstanding this, the centre contains a number of charity shops (8 units), DIY stores (6 units) as well as furniture stores (4 units). In this regard, the centre is able to meet the more localised comparison shopping needs of surrounding residents.

7.69 The service sector, which includes restaurants, cafes, fast food, hairdressing, beauty & health along with banks & financial services and estate agents & auctioneers comprises 65 units (43.8%) which is 4.0% higher than the national average. In particular, restaurants, cafes and fast food is strongly represented, standing at 6.5 percentage points above the national average, with a total of 37 units, of which 12 units are occupied by fast food vendors. Hairdressing, beauty & health along with estate agents & auctioneers fall broadly in line with national averages. In terms of the evening and night-time economy, Penge contains five pubs which are distributed along the High street including Goldsmiths Arms which is also a live music venue. Whilst the district centre lacks the provision of a cinema, an Admiral Casino is found adjacent to the Blenheim Shopping Centre.

Table 7.10 Diversity of uses in Penge district centre (Experian Goad September 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	23	16.4	10.1	+6.3
Comparison	39	25.3	33.5	-8.2
Services (Financial and business + leisure services)	65	43.8	39.8	+4.0
Vacant outlets + miscellaneous	**20**	13.7	15.5	-1.8
TOTAL	**146**	**100%**	**100%**	**100%**

Source: Experian Goad survey, September 2023

Retailer Representation

7.70 Penge is anchored by an Iceland supermarket and a Sainsbury's which are located on the southern side of the High Street, on opposite sides of Croydon Road (A213). The Sainsbury's store is larger than the retailer's branches discussed above which anchor Beckenham and Crystal Palace district centres, with a broader product range, the benefit of an Argos concession, and a more pleasant shopping environment. There is a small customer car park to the rear.

7.71 The Iceland store is located in the Blenheim Shopping Centre, it is pertinent to consider that the centre has a resolution to approve planning permission[49] for a comprehensive redevelopment to provide a mixed use scheme, meaning that existing stores such as Iceland and Peacocks will close once this development comes forward. A Wilko store also used to be situated in the Blenheim Shopping Centre until the store closed in September 2023 as the result of the national retailer going into administration; this unit remains vacant. Until recently there was also a Lidl supermarket trading in the centre, however this closed following lease expiry and has been replaced by an independent supermarket — Mega Saver — which appears well stocked and used by local residents.

7.72 Other national retailers found along High Street include Poundland, Tesco Express, Londis, One Stop and Boots, meaning that the district centre provides a variety of retailers which can serve the day-to-day shopping needs of local residents. A large Homebase store is also found along the western end of the High Street towards Crystal Palace, although it falls outside of the defined town centre. A number of fast food chains are found centrally within the High Street, including KFC, McDonald's, Burger King and German Doner Kebab.

Balance Between Independent & Multiple Stores

7.73 Of the 146 units found within the district centre, a total of 30 units are occupied by national multiple retailers. The offer of the centre as a whole is therefore heavily orientated towards the independent retail sector, although it is the national retailers that appear to predominantly drive footfall. The independent offer includes five convenience stores along with specialist grocers such as the Penge Halal Meat Market and Kacper Polish Delicatessen amongst others. The aforementioned Mega Saver supermarket can be considered a positive addition to the centre and one which also has the potential to be an anchor store in its own right.

[49] Application ref. 23/00178/FULL1

7.74 There is a slightly more upmarket independent retail offer towards the western end of the High Street, with independent establishments such as the Penge General store and Craft Metropolis which help provide further diversification of the retail offer.

7.75 Despite the presence of several national fast food operators the district centre lacks the provision of other national food and beverage operators, however there is a good variety of independent restaurants across a range of cuisines. Likewise, there are also several independent coffee shops in addition to Costa Coffee which is found centrally within the High Street. In addition, Blackbird Bakery is a recently opened independent coffee shop that is situated towards the centre of High Street. Elsewhere within the centre, a record shop (Revolution Records) and a coffee shop and roastery (Carnival) have both opened in the centre in recent months and have assisted in diversifying the retail and leisure offer of the centre.

Vacant Street Level Property

7.76 The Experian Goad Survey of Penge Town Centre (September 2023) identified 20 vacant units, comprising 13.7% of the total number of units found within the district centre compared to the UK average of 15.5%. It therefore has a UK average which is 1.8 percentage points below the UK average, although evidently the vacancy rate is relatively high and should be monitored by the Council. There are, however, with the exception of the former Wilko, no particularly large or prominent vacant units which particularly negatively impact on the overall vitality of the centre.

7.77 From our site visits to Penge town centre we noted there have been relatively few changes to the vacant property offer in the town centre from those identified by the Experian Goad survey, however a vacant unit at 107 High Street has been let to Blackbird Bakery; and a public house at 156 High Street which was identified as vacant by the Experian Goad survey has now reopened. A former vacant unit at 9 Central Parade (close to Sainsbury's) has recently opened as a coffee shop and roastery (Carnival). All of these recent changes can be considered positive additions to the offer of the centre.

7.78 Similarly, the majority of units identified by the Experian Goad survey remained open at the time of our visit, with the exception of a former pawnbrokers at 5 Central Parade which has closed down. Overall therefore, the vacancy rate remains high, but does not appear to be worsening. It is recommended that levels of vacancy in the centre are monitored moving forwards.

Customers' views and behaviour

7.79 The following section sets out the findings of the household telephone survey in respect of those respondents who stated they visit/use Penge district centre.

Frequency of visit

7.80 16.2% of respondents who use Penge district centre stated they visit at least once a week; a further 11.7% stated they visit at least twice a week and 9.2% stated they visit daily. Combined, this means that 37.2% of respondents who identify as using the centre visit at least once a week. We consider this to be a good level of patronage and an indication that Penge meets many residents' day to day shopping needs. It is noteworthy that the 'daily' figure of 9.2% is the highest of any of the district centres in the Borough. In addition to the above, a further 9.8% of respondents stated they visit at least once a fortnight, and 18.9% at least once a month.

Main purpose of visit

7.81 The main purpose of visiting the district centre was, by some margin, food shopping, which 30.6% of respondents stated as being their main purpose, this was followed by 14.2% for non-food shopping and 11.0% who stated they visit the market. As there is no regular market held in Penge town centre itself, it is not immediately clear what this latter response refers to but could potentially be a reference to the food market which is held at the Penge end of Crystal Palace Park (at the western end of the centre) every Sunday.

Table 7.11 Main purpose of visit to Penge town centre (household survey respondents)

Rank	Main purpose of visit — Penge	% of responses
1	Purchasing food shopping (not click & collect)	30.6%
2	Purchasing non-food shopping (not click & collect)	14.2%
3	Visiting the market	11.0%
4	Visiting friends / relatives who live in the town centre	7.9%
5	Window shopping / browsing (no purchase made)	6.0%

Source: household survey results

Linked trips

7.82 Undertaking non-food shopping was identified as a popular 'linked' activity for users of the centre, with 27.0% of respondents stating that they also undertake this as a linked activity. As seen previously with the results for Crystal Palace therefore, whilst non-food shopping is not a main driver of visits in its own right, it is an important secondary contributor to the overall offer of the centre. In terms of other linked activities, 22.1% states they visited daytime leisure facilities, 21.5% stated they visit evening leisure facilities (pubs and restaurants), and 17.1% undertake food shopping.

7.83 Of note is that 18.8% of respondents also stated that their linked activity is collecting a ‘click and collect’ order, which is likely to be driven by the recent opening of an Argos concession within the Sainsbury’s store. The click and collect linked trip figure is significantly higher than any other district centre in the Borough (the second-highest equivalent figure being 7.98% for West Wickham).

Likes and dislikes

7.84 The attributes most respondents liked about the district centre are summarised in **Table 7.12** below. It shows that most respondents value the choice of places to eat and drink in the centre (25.2% of respondents), which is interesting in the context of our previous findings that Penge’s offer in this respect is somewhat overly orientated towards the takeaway/fast food side of the market. Other positive attributes include the centre being close to home (23.8% of respondents), and having a nice atmosphere (22.3% of respondents).

7.85 In terms of dislikes, it is highly positive to note that almost 50% of respondents stated that there was nothing they disliked about the centre, indicating a good range of satisfaction amongst users of the centre. 12.1% stated they consider the centre to have an insufficient number of non-food shops, and 6.9% considered there to be an insufficient number of parking spaces in the centre.

Table 7.12 Summary of attributes (likes/ dislikes) regarding Penge town centre

Rank	Attribute – most liked (Penge)	% of responses	Attribute – most disliked (Penge)	% of responses
1	Choice of places to eat / drink (e.g. restaurants, cafes, pubs, etc.)	25.2%	(Nothing)	48.1%
2	Close to home	23.8%	Lack of choice and range of non-food shops	12.1%
3	Nice atmosphere / friendly people	22.3%	Not enough parking spaces	6.9%
4	Close to friends / relatives	19.6%	Expensive shops	6.1%
5	Choice and range of shops	15.6%	Empty shops	5.9%
6	Choice of independent retailers	13.5%	Lack of choice and range of independent retailers	5.9%
7	Environmental quality of centre (attractive place)	11.2%	Shops don't open late	5.8%
8	Familiar / know where everything is	9.0%	Lack of choice and range of food shops	4.7%
9	Cleanliness	8.7%	Too many charity shops	4.0%
10	Quiet / not too busy	8.5%	Having to use an app for parking	4.0%

Source: household survey results

Pedestrian Flows

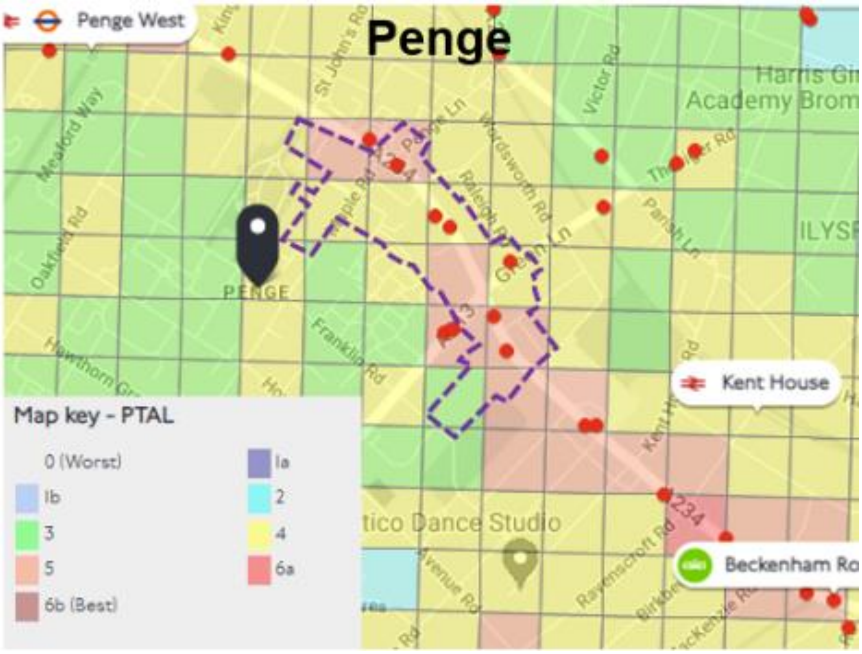
7.86 From our observations at the time of our visits to the centre Penge does not appear to command the same high levels of footfall as some of the Borough's other district centres — likely in part to be a reflection of the long, linear nature of the centre. Its key anchors are generally located at the eastern end of the centre (centred on Sainsbury's), and footfall east of the Green Lane / High Street junction was observed to be noticeably stronger. The town centre is quietest west of the Maple Road junction and there is scope for the strong linkages which the town centre has with both the nearby railway stations (see below) and nearby Crystal Palace Park and Penge Recreation Ground to be enhanced, in order to help encourage more footfall through this part of the centre. However, it is important to note that even in the quieter areas of the centre, footfall remained relatively moderate and was not of such a low level that it would represent a cause for concern.

Accessibility

7.87 As seen in **Figure 7.9**, a large proportion of the town centre scores either 4 or 6a on the PTAL rating with 6b being considered the highest rating, therefore Penge can be considered a generally accessible location via public transport. The higher levels of PTAL are at the western and eastern ends of the centre where there is easier accessibility to local railway stations.

7.88 Penge is well served in respect of rail connections, benefiting from access to multiple railway stations including Penge West and East in addition to Kent House. Penge West station is located approximately 500m to the east of the district centre and is served by London Overground services, with four trains per hour in either direction, providing services to London stations such as Whitechapel and Canada Water to the north and West Croydon to the south. Penge East is located approximately 200m to the north of the district centre and provides services to London Victoria every 30 minutes, heading eastwards the railway station connects to Bromley South and Orpington. Kent House is also located on the same railway line and is located approximately 400m to the east of the district centre. A further London Overground station, Anerley, is also within walking distance of the centre, via Maple Road.

Figure 7.9 PTAL map for Penge district centre (annotated to show district centre boundary)



Source: Transport for London (correct as of April 2024)

7.89 Most bus services in Penge run along the High Street corridor, with further routes crossing over the High Street at its Croydon Road / Green Lane junction; overall the centre can be considered well-served. There are direct connections to Beckenham and Bromley via the high-frequency 227 service. Penge is also the terminus / start of route 176 which runs to central London via Sydenham and Forest Hill. There are also direct bus connections to Bell Green Retail Park and several bus routes which run to Croydon. Key bus services in centre are:

- route 75 (Lewisham to Croydon via Catford and Sydenham)
- route 176 (Penge to Tottenham Court Road via Sydenham, Forest Hill)
- route 194 (Lower Sydenham to West Croydon via Penge, Beckenham, Elmers End and West Wickham)
- route 197 (Peckham to Croydon via Norwood Junction)
- route 227 (Crystal Palace to Bromley North via Penge and Beckenham)
- route 354 (Penge to Bromley North via Beckenham and Ravensbourne)
- route 356 (Shirley to Upper Sydenham via Elmers End, Penge and Forest Hill)
- route 358 (Crystal Palace to Orpington via Beckenham and Bromley)

7.90 In term of car parking, there is a 216 space car park found centrally along the High Street which forms part of the Blenheim Shopping Centre, however the site has recently gained a resolution to approve planning permission for a mixed use redevelopment which is only detailed to provide a total of 24 spaces for public use when constructed. From conversations with the Penge BID we understand that the potential loss of parking at the western end of the centre has presented some concern from local businesses, some of whom are understood to be at least partly reliant on car-based trips. Whilst on paper the generally good levels of accessibility of the district centre (reflected in the high PTAL as discussed above) should limit the scope for most businesses to be impacted, it is acknowledged that an element of car parking is likely to continue to be required to support businesses throughout the centre.

7.91 Elsewhere in the centre, the main car parks are the Sainsbury's car park (a relatively small car park which offers 1.5hrs free parking) and, at the western end of the centre, a larger car park associated with the Homebase store. There are signs within the latter car park stating it is only for customer use.

Perception of Safety and Occurrence of Crime

7.92 In reference to data published by London Metropolitan Police and as shown in **Table 7.13** a total of 233 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was anti-social behaviour, violence and sexual offences. Across the last 6 months the number of offences recorded ranged from 46 in March 2024 to 34 in November 2023.

Table 7.13 Crime statistics for Penge town centre, November 2023 – April 2024

Penge	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	6	17	2	7	7	7	**46**
Burglary	0	0	1	9	0	2	**12**
Criminal Damage and Arson	0	1	1	0	0	0	**2**
Drugs	3	0	0	0	1	1	**5**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	3	4	4	0	2	4	**17**
Shoplifting	5	3	8	3	4	0	**23**
Theft	12	0	7	7	10	7	**43**
Vehicle Crime	1	1	3	1	6	1	**13**
Violence and Sexual Offences	4	1	11	11	8	10	**45**
other crime	0	8	0	7	8	4	**27**
Total	**34**	**35**	**37**	**45**	**46**	**36**	**233**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

7.93 Penge can overall be considered to have a reasonable environmental quality. Its linear nature does mean that vehicular traffic runs through the length of the centre, but for much of the centre (particularly east of the Maple Road junction), the centre benefits from wide pavements along its southern side, with retail / commercial premises set back from the road, which means that the passing vehicular traffic feels less invasive. There is scope for the wide pavements to be better used to animate the street scene, although as noted above there are relatively few restaurant / café outlets in the centre, who would be most well placed to take advantage of the wide pavements parts of the centre offers.

7.94 Overall the centre feels well maintained and tidy; shopfronts appear for the most part to be in good condition. The more informal nature of some of the commercial units along Maple Road (a secondary part of the centre) does not lend this area a particularly strong environmental quality, and improvements in the visual coherence of the units would be helpful. There is also a unit adjacent to 'Blue Belle Café' which is in a physically poor state of repair with a partly boarded up frontage. Maple Road itself is an interesting collection of small businesses which has scope to make a positive addition to the offer of the centre as whole; there is already evidence of investment in the street, evidenced by the presence of attractive hanging baskets and some small directional signage at the High Street junction; but further improvement measures would be beneficial.

Exterior view of the Blenheim Shopping Centre, which is the subject of a planning application for redevelopment.

The Sainsbury's store can be considered the overall 'anchor' to the offer of the centre but is located at its eastern end

7.95 As can be seen from **Figure 7.11** the centre does not benefit from much by way of historic assets but at the western end of the centre is Watermen's Square, a series of Grade II listed almshouses dating from the 1840s which are now private residences. These buildings are located in the Penge High Street Conservation Area which was formerly adopted in 2022. These, combined with the adjacent listed church, and the Penge Recreational Ground on the opposite side of the road, afford this western end of the centre with a pleasant environmental quality. As noted above it is considered there is scope for enhanced linkages between the wider town centre and its western end, including onwards westwards to Crystal Palace Park.

Figure 7.10 Heritage assets in Penge District Centre

Source: Historic England base map with Firstplan annotations. Source: Historic England base map with Firstplan annotations. Annotated to show policy boundary of district centre, Conservation Area boundary and key heritage assets.

Conclusions

7.96 Overall, we consider Penge to benefit from a good level of vitality and viability. The centre sits towards the more functional end of the spectrum compared to some of the Borough's other centres, but it appears able to meet day to day needs well, particularly in terms of convenience shopping. The closure of Wilko has left a gap in the comparison goods offer of the centre although this is in part filled by Poundland and Argos (within Sainsbury's). The western end of the centre has a strong independent offer and one which appears to have improved in recent years.

7.97 The centre has scope to enhance its food & beverage offer, which at the moment heavily leans towards fast food restaurants. A more diverse offer would help stimulate more of an evening economy in the centre. There is also scope for Penge to place more emphasis on its close proximity to the Recreation Ground and Crystal Palace Park.

Table 7.14 Summary of strengths and weaknesses of 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.

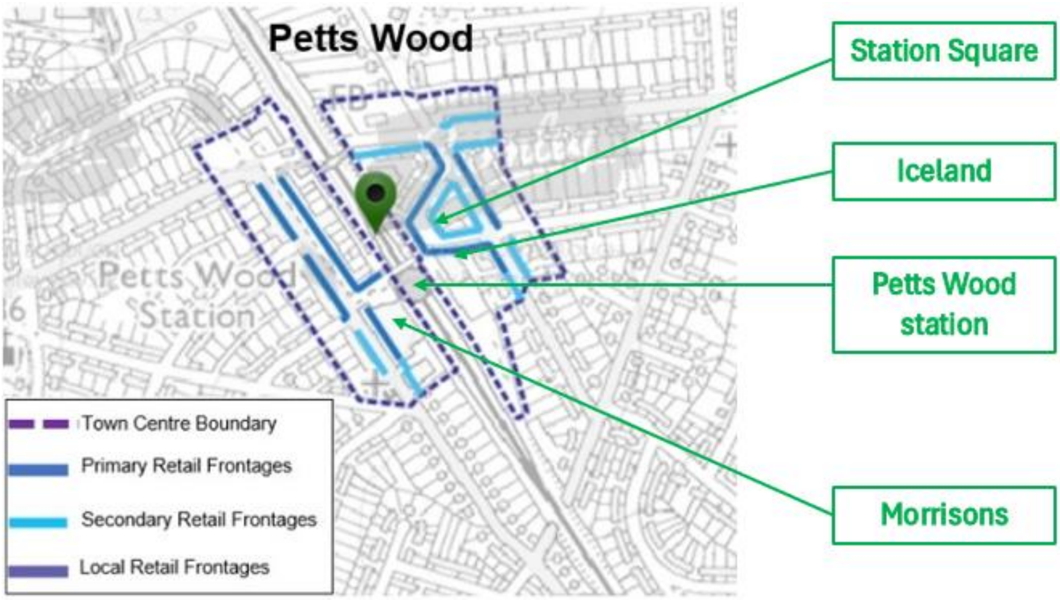
SECTION 8 | TOWN CENTRE HEALTH CHECKS — DISTRICT CENTRES (CENTRAL & EAST OF BOROUGH)

8.1 In this section we set out an assessment of the vitality and viability of the remaining district centres in LBB, which are located across the central-eastern belt of the Borough; **West Wickham** which is located to the western periphery of the Borough close to the border with LB Croydon; and **Petts Wood**, which sits midway between Bromley town centre to the north west and Orpington town centre to the south east.

Petts Wood district centre

8.2 Petts Wood is a district centre located approximately 4km to the southeast of Bromley town centre. The centre is comprised of two distinct areas as the result of a railway line which dissects the town centre, with Petts Wood railway station sat centrally with the centre between the two commercial areas. Petts Wood is anchored by two supermarkets; the town centre area located on the western side of the railway line runs in a linear fashion along both sides of Queensway, and is anchored by a Morrisons supermarket towards the southern end of the centre whilst on the eastern side of the railway line the centre is focussed around the reasonably attractive setting of Station Square.

Figure 8.1 Local Plan town centre boundary & retail frontages in Petts Wood town centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of uses

8.3 The most recent assessment of the diversity of uses of Petts Wood is the Experian Goad survey of the town centre, which was undertaken in February 2023. Firstplan undertook site visits to Petts Wood town centre in February 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses is shown in **Table 8.1.** In terms of convenience goods representation, a total 17 outlets are found within the centre, equating to 12.1% which is 2.0 percentage points higher than the UK average. For comparison goods, Petts Wood contains 39 outlets, comprising 27.7% of the total number of units which is 5.8

percentage points below the UK average. The underrepresentation in comparison goods is driven by the lack of mixed/general clothing stores and sports, toys, cycles & hobbies stores, with no such stores found within the town centre. The centre is well represented in terms of furniture, carpets, textiles stores (6 in the centre) and DIY, hardware & household goods stores (5 in the centre).

Table 8.1 Diversity of uses in Petts Wood district centre (Experian Goad, February 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	17	12.1	10.1	+2.0
Comparison	39	27.7	33.5	-5.8
Services (Financial and business + leisure services)	77	54.6	39.8	+14.8
Vacant outlets + miscellaneous	7	5.0	15.5	-10.5
TOTAL	141	**100%**	**100%**	**-**

Source: Experian Goad survey, February 2023

8.4 The services sector which includes financial, business and leisure services is strongly represented with a total of 77 units, equating to 54.6% which is 14.8 percentage points higher than the UK average. Restaurants, cafes and fast food account for 35 units which is 6.0% higher than the UK average. Restaurants and pubs are an integral part of the evening economy whilst cafes are footfall generators during the daytime, and the majority of these uses are concentrated in the eastern side of the town centre. At the time of our visits to the centre the popularity of the centre as a place to drink and dine out was noted to be clearly apparent, with cafes, pubs and restaurants all appearing busy.

8.5 The second most prevalent use is hairdressing and beauty & health, a total of 33 such outlets are found within the centre, comprising 23.4% of the total which is significantly higher than the UK average of 13.7%. There are no banks in the centre, with a branch of Barclays in Station Square closing in May 2020, with the unit remaining vacant since. However, banking facilities are available within a Post Office which is located within a Premier newsagents on Fairway.

Vacant units

8.6 Petts Wood has a vacancy rate of 5.0% which is markedly lower than most up to date UK average of 15.5% that recorded in October 2023 which is strong indicator that centre is showing goods levels of viability and vitality. From our visits to the town centre, we did not observe a particular concentration of vacant units, rather the limited number of vacant units were dispersed sporadically throughout the centre. There has been limited amount of change to the quantum of vacant units in the town centre since the Experian Goad survey was undertaken in February 2023, with the only change comprising the formerly vacant 85 Queens Way which is now occupied by Sun Do Chinese takeaway.

8.7 As noted above, one of the most prominent vacant units within the centre is the former Barclays on Station Square, where the prominence of the vacant unit is made more apparent by the fact the unit occupies a double frontage. This unit has been vacant for over four years which is considered surprising given its prominence within the centre and proximity to the station and other local amenities. On the eastern side of Station Square, a further vacant unit is the former HSBC bank, which appears to have been vacant for close to a decade; it is understood that proposals to convert this unit to a beauty salon have not progressed.

Retailer representation & balance between independent and multiple stores

8.8 Petts Wood does not contain significant levels of representation from national multiple retailers, which account for 9.9% of the total number of units compared to the UK average of 21.5%. The district centre is anchored by a Morrisons supermarket which is situated along Queensway, adjacent to Petts Wood Railway Station, in addition an Iceland supermarket is located on the opposite side of the railway line, within Station Square. These foodstores are considered 'anchor stores' which are key footfall generators and provide the opportunity for linked trips to other outlets that are found within the town centre. The Morrisons store is a well-stocked, large supermarket and was noted to have good levels of footfall at the time of our visit, notwithstanding its dated and uninviting visual appearance.

8.9 Other national multiple retailers include Boots pharmacy and Cardfactory. National operated convenience stores include Costcutter and Sainsbury's Local, whilst a Little Waitrose is located within the Shell fuel station that is adjacent to the Morrisons supermarket. Also on the western side of the centre is a large Wetherspoon's pub. A Cook frozen food store is located at Petts Wood Road which sells high end food products. Two Costa Coffee shops are found in Petts Wood, situated on opposite sides of the railway line, whilst a Papa John Pizza takeaway is found along Fairway, on the eastern side of the centre.

8.10 The centre benefits from a wide range of independent operators across a number of sectors. The centre contains an array of furnishing stores including flooring, carpet, blinds and hardware stores. In terms of convenience goods, the Butcher's End & Deli, Laura's End delicatessen and Jasmine Greengrocer all provide a range of high quality food products which are all located to the east of the railway line. Whilst there is a lack of mixed clothing or men's clothing, two women's clothing stores are found along Petts Wood Road to the east of the railway line, along secondary frontages.

8.11 In terms of leisure uses, the centre contains a total of four pubs; a JD Wetherspoon is situated within the northern section of Queensway whilst The Rising Sun, The Daylight Inn and One Inn The Wood are located to the north of the railway line along Station Square, Petts Wood Road and Fairway. Station Square also contains two bars. Whilst the centre lacks the provision of nationally operated dine-in restaurants, nine independent restaurants are found within the town centre boundary, the majority of which are situated along the eastern side of the railway line, within Station Square. A number of cafes are found within centre including Coffee X, Cow & Bean and Walnuts Café which provide a more upmarket offering. A total of seven take aways are found on the western side of the railway line whilst three independent take aways are found to the east of the railway line.

8.12 Other leisure uses include a snooker and pool club that is located along the western side of West Approach, next to the railway station. Whilst Petts Wood lacks the provision of gym or leisure centre, a Pilates studio and a boxing club are situated along Queensway.

8.13 Qualitatively, there is a clear difference between the overall quality of the retail and leisure offer between the western and eastern sides of the district centre. The eastern side attracts a more upmarket range of retailers and services, perhaps reflective of the overall stronger environmental quality in this part of the centre (discussed further below). The offer on the western side of the centre is generally more downmarket and functional in nature.

Customers' views and behaviour

8.14 The following section sets out the findings of the household telephone survey in respect of those respondents who stated they visit/use Petts Wood district centre.

Frequency of visit

8.15 11.4% of respondents who use Petts Wood district centre stated they visit at least once a week, with a further 12.2% stating they visit at least twice a week, and 6.3% visiting daily. Combined therefore, just under 30% of respondents who stated they use the centre visit at least once a week. This can be considered a reasonably strong level of patronage, albeit one with some scope for improvement compared to other centres in the Borough. Nearly a quarter of respondents (23.9%) stated that they visit at least monthly, which is the highest bracket of responses, indicating that users of the centre are more infrequent visitors compared to some other centres in the Borough.

Main purpose of visit

8.16 Interestingly, a number of responses polled relatively high percentages for this question and there was no clear leading reason for visiting the centre amongst respondents. Food shopping drew 16.1% of responses, marginally ahead of evening leisure (likely driven by the good range of pubs and restaurants in the centre as our health check identifies) at 16.0% and non-food shopping at 14.9%.

Table 8.2 Main reasons for visiting Petts Wood district centre (household survey respondents)

Rank	Main purpose of visit — Petts Wood	% of responses
1	Purchasing food shopping (not click & collect)	16.1%
2	Evening leisure activity e.g. visiting restaurants, pubs, bars	16.0%
3	Purchasing non-food shopping (not click & collect)	14.9%
4	Visiting friends / relatives who live in the town centre	11.2%
5	Daytime leisure activity e.g. visiting cafes, restaurants	10.3%

Source: household survey results

Linked trips

8.17 Over 70% of respondents stated that they undertake linked shopping trips when visiting the centre, with 28.9% of respondents visiting cafes (the highest percentage of respondents for this answer across any of the district centres), and 21.9% undertaking food shopping.

Likes and dislikes

8.18 The attributes most respondents liked about the district centre are summarised in **Table 8.3**. It shows that most respondents value the choice of places to eat and drink in the centre (25.2% of respondents). Other positive attributes include the centre being close to home (23.8% of respondents), and having a nice atmosphere (22.3% of respondents). In terms of dislikes, it is highly positive to note that almost 50% of respondents stated that there was nothing they disliked about the centre, indicating a good range of satisfaction amongst users of the centre. 12.1% stated they consider the centre to have an insufficient number of non-food shops, and 6.9% considered there to be an insufficient number of parking spaces in the centre.

Table 8.3 Likes and dislikes of Petts Wood district centre (household survey respondents)

Rank	Attribute – most liked (Petts Wood)	% of responses	Attribute – most disliked (Petts Wood)	% of responses
1	Choice of places to eat / drink (e.g. restaurants, cafes, pubs, etc.)	25.2%	(Nothing)	48.1%
2	Close to home	23.8%	Lack of choice and range of non-food shops	12.1%
3	Nice atmosphere / friendly people	22.3%	Not enough parking spaces	6.9%
4	Close to friends / relatives	19.6%	Expensive shops	6.1%
5	Choice and range of shops	15.6%	Empty shops	5.9%
6	Choice of independent retailers	13.5%	Lack of choice and range of independent retailers	5.9%
7	Environmental quality of centre (attractive place)	11.2%	Shops don't open late	5.8%
8	Familiar / know where everything is	9.0%	Lack of choice and range of food shops	4.7%
9	Cleanliness	8.7%	Too many charity shops	4.0%
10	Quiet / not too busy	8.5%	Having to use an app for parking	4.0%

Source: household survey results

Pedestrian flows

8.19 It was observed that pedestrian activity varied between different sections of the centre. A lack of pedestrian activity was more apparent along the northern section of Queensway in addition to the eastern section of Petts Wood Road, along secondary frontages. Greater levels of activity was observed around West Approach, which is adjacent to both the Morrisons supermarket and Petts Wood Railway Station. Likewise, higher levels of footfall was observed in the immediate area surrounding the eastern side of the railway line, in and around Station Square which contains a Iceland supermarket. The only method of crossing between the western and eastern sides of the district centre is via the railway station footbridge, which is likely to act as a constraint to users of the centre visiting both of its constituent parts and relatively limited ‘throughflow’ of footfall was observed at the time of our visit.

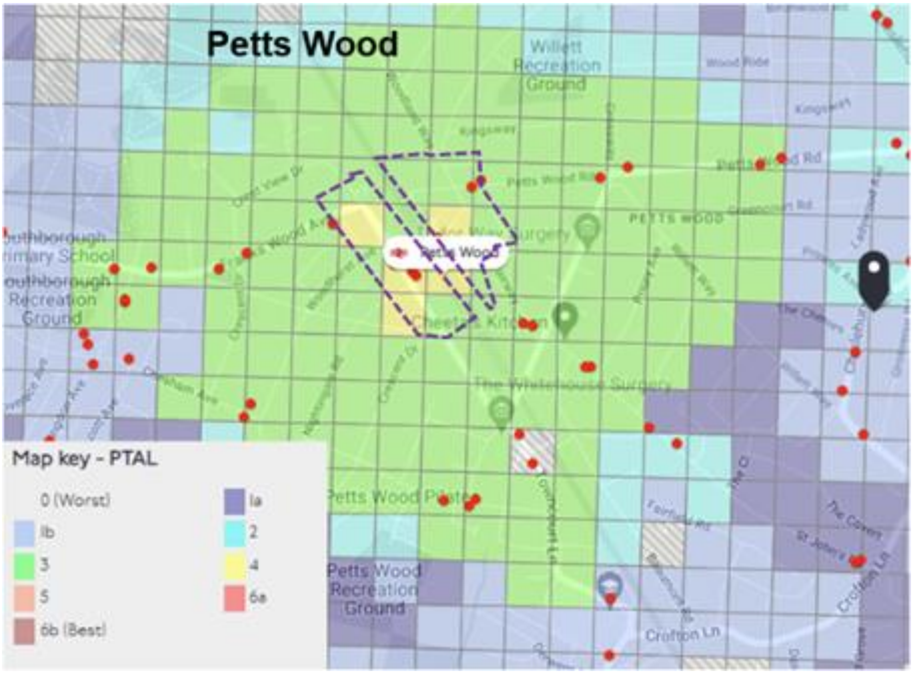
Accessibility

8.20 Petts Wood benefits from good connections to surrounding town centres; Queensway adjoins to Frank Wood Avenue to the north which provides access to Bickley and further to Bromley via Bromley Common (A21), to the south Queensway adjoins Croton Road which provides access to Orpington. To the east of Petts Wood Railway Station, Petts Wood Road adjoins Chislehurst Road (A208) which provides access to Chislehurst to the north.

8.21 The centre is well provided for in terms of car parking; the Morrisons supermarket is supported by a 135 space underground car park which provides free parking for customers. Petts Wood Railway Station contains 190 space car park which costs £6.10 for a two hour stay. Towards the northern end of Queensway, a 47 space car park operated by LBB costs £1.40 for a two hour stay. On street parking is also provided along Queensway, Station Square, Westway and Petts Wood Road at a cost of £2.30 for a two hour stay which provides convenient access to the adjacent commercial units. There is therefore quite a disparity in parking charges across the centre, a reflection of the different ownerships of the car parking facilities.

8.22 As shown in **Figure 8.2** the centre has a PTAL rating of both 3 (moderate) and 4 (good), indicating that that there is adequate access to public transportation services. Petts Wood Railway Station is conveniently located centrally within the district centre and effectively cuts the district centre into two separate areas. Services to Bromley South Railway Station operate every 15 minutes on average, with more frequent services available at peak times. The railway station provides connections to multiple central London stations, including Charing Cross, London Victoria and Cannon Street, with connections to each typically operating every 30 minutes. Heading southwards, Petts Wood Railway Station connects to Orpington, Dunton Green and Sevenoaks.

Figure 8.2 PTAL map for Petts Wood district centre (annotated to show district centre boundary)



Base map source: Transport for London. Note – bus stops denoted by red dots.

8.23 In terms of bus services, the 208 bus connects Petts Wood with Bromley town centre and Lewisham to the north and Orpington to the south which operates every 12 minutes during the daytime. The R7 service connects Petts Wood with Chelsfield to the south via Orpington and Chislehurst to the north via Bickley station, operating every 30 minutes and the R3 connects Petts Wood with Locksbottom to the southwest and Orpington to the south via St Mary Cray which operates every 20 minutes during the daytime.

8.24 Towards the north, the 273 bus operates between Petts Wood Station and Lewisham Station via the Nugent Retail Park, St Mary Cray, Chislehurst and Hither Green which operates every 20 minutes during the daytime. In addition, the N199 night bus connects Petts Wood with Charing Cross / Trafalgar Square via Bromley and Lewisham. Bus stops are located either side of the railway line, allowing passengers to access both parts of the town centre.

Perception of safety and occurrence of crime

8.25 In reference to data published by London Metropolitan Police and as shown in **Table 8.4** a total of 122 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was theft, and violence and sexual offences. Across the last 6 months the number of crimes recorded ranged from 14 in April 2024 to 26 in February 2024. Upon visits to the town centre, we did not encounter any evidence of antisocial behaviour.

Table 8.4 Crime statistics for Petts Wood town centre, November 2023 – April 2024

Petts Wood	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	3	4	0	5	3	1	16
Burglary	2	1	3	3	1	0	10
Criminal Damage and Arson	1	3	2	3	1	0	10
Drugs	1	1	1	0	0	0	3
Possession of Weapon	0	0	0	1	0	1	2
Public Order	0	2	1	1	1	3	8
Shoplifting	2	2	1	3	1	5	14
Theft	3	4	3	3	3	1	17
Vehicle Crime	0	2	0	1	0	0	3
Violence and Sexual Offences	3	6	6	1	5	1	22
other crime	2	2	4	5	2	2	17
Total	**17**	**27**	**21**	**26**	**17**	**14**	**122**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town centre environmental quality

8.26 Petts Wood can be considered to have a generally pleasant environment, the shop fronts are in good condition and the streetscene is well maintained with a lack of litter observed on pedestrian walkways. However, it is apparent that there is a disparity in the visual quality between the two areas that are separated by the railway line, as discussed below.

8.27 The area to the western side of the railway line comprises a linear row of shops located on either side of Queensway. Whilst this area benefits from having wide pavements which enables restaurants and cafes to have outdoor seating areas (although more could be made of this), some areas of hardstanding outside a number of shopfronts are in a poor condition which creates a slightly austere environment. In addition, the quantum of grey paving that is seen along Queensway dominates the streetscene and would benefit from a greater number of trees and/or landscaped areas. The Morrisons supermarket has an external finish that is comprised of pebble dash, as a consequence the store has a quite dated appearance which does not contribute positively to the surrounding commercial setting.

8.28 The area in the vicinity of the western approach to the railway station, leading off Queensway, feels somewhat neglected and without the animation of passing users of the centre and the shops being open could perhaps feel somewhat quiet at night. This is compounded by the fact the eastern side of this approach is largely given over to the back of the Morrisons supermarket and its service yard, providing no opportunities for natural surveillance.

8.29 The two sides of the town centre are linked by a wide pedestrian footbridge over the railway line, which also provides access to the station platforms. Clearly, this limits the scope for movement between the two sides of the centre and the comparatively weaker offer on the western side is also likely to discourage linked trips. The approaches to the crossing have scope for improvement on both sides of the centre, but particularly on its western side where the crossing sits adjacent to the entrance of the service yard of the Morrisons supermarket, and next to a large bank of recycling bins. In addition to the service yard, the western approach also includes a bus stand, although this does not appear to be in use by regular services.

8.30 Improving the quality of the public realm in this part of the centre should be explored, as it currently forms a poor gateway when arriving by train, negatively impacts the overall visual appearance of the centre, and is likely to discourage linked trips between the two parts of the centre. It is acknowledged that any improvements in the public realm will need to have regard to the continued servicing needs of the Morrisons store.

8.31 In contrast, the town centre area located to the east of the railway line is considered to have more of a higher quality public realm, predominantly as the result of the layout of the built environment surrounding Station Square. The central island within Station Square contains The Daylight Inn, a Grade II listed building pub, in addition to the Aqua Bar & Grill which both contribute positively to the visual quality of the area, in particular the set of sail canopies at the front of the Aqua Bar provide a contemporary and upmarket finish. The central island is also lined by shrubbery and trees which complements the surrounding setting and creates a more picturesque streetscene. The series of shopping parades that surround Station Square have a Tudor style architectural design, comprised of black timber and white timber. The uniform design creates an historic setting, as evidenced by the Station Square Conservation Area designation that was created in 1995. The only visual detractor that was observed within this area is the two floors of office space that are situated above the Iceland supermarket which does not conform with the surrounding environment and does contribute to the surrounding visually attractive setting.

8.32 In theory, there is scope for the setting of the Station Square area to be further improved through the removal of the parking bays along either side of the Square, but in practical terms given these are one of the main sources of car parking on the eastern side of the centre, and were noted to be well used at the time of our visit, such an objective may not be possible without compromising the overall vitality of this part of the centre. The Square is also used as the terminus for the 273 bus route. Nevertheless, opportunities to deliver enhancements to the public realm, particularly along the southern side of the Square, around Iceland and the railway station entrance, should be explored.

Figure 8.3 Heritage assets in Petts Wood district centre

Source: Historic England base map with Firstplan annotations. Source: Historic England base map with Firstplan annotations. Annotated to show policy boundary of district centre, Conservation Area boundary and key heritage assets.

8.33 The section of secondary frontage that falls outside of the Station Square Conservation Area, along Petts Wood Road comprises a uniform shopping parade which benefits from facing onto a row of mature trees, adjacent to the Petts Wood Memorial Hall which forms a good quality public realm. Compared to other centres in the Borough there are however few buildings of architectural merit in the centre, with just one listed building, the Grade II-listed Daylight Inn, in Station Square.

Attractive buildings and active street scene with pavement dining at Station Square

The main linkage between the western and eastern parts of the centre via the railway station is, when approached from the western side, unattractive and offers scope for improvement

The Morrisons anchor foodstore on the western side of the centre has a dated external appearance

Conclusion

8.34 Overall, Petts Wood district centre is currently demonstrating goods levels of vitality and viability. Vacancy rates in the centre were identified by the most recent Experian Goad survey as being significantly below the UK average, with just five vacant units identified and from our visits to the town centre, one of these units has now been occupied. The centre offers a good range of uses to meet the day-to-day needs and service needs of its local residents and neighbouring areas, fulfilling its role as a district town centre.

8.35 The is a noticeable disparity in the quality of the public realm and pitch of retail and leisure offer between the two town centre areas that are separated by the railway line, with the area found to the east containing the majority of the more upmarket restaurants, cafes and retail stores in addition to having a more visually attractive streetscene. Overall, matters relating to the environmental quality of the centre provide the main constraint to the overall vitality and viability of the centre.

Table 8.5 Summary of strengths and weaknesses of 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

8.36 West Wickham is the westernmost district centre in the Borough, sitting close to the Borough's administrative boundary with LB Croydon. It is a mostly linear district centre running west to east along High Street. The centre has a strong convenience goods focus and is, unusually, bookended by two medium-sized Sainsbury's supermarkets either end of the district centre. Other retailers present in the centre include M&S Foodhall, Lidl, Specsavers, Clarks, Caffe Nero, Carpetright, and a varied independent sector.

Figure 8.4 Local Plan town centre boundary & retail frontages in West Wickham town centre, annotated with key developments / premises

Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses

8.37 The most recent assessment of the diversity of uses of West Wickham district centre is the Experian Goad Survey of the centre, which was undertaken in October 2023. Firstplan undertook site visit to West Wickham town centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer.

8.38 A summary of the diversity of uses in the town is shown in **Table 8.6**. It shows that the district centre contains 153 units in total, with retail (comparison and convenience) comprising 72 of these, totalling approximately 47% of the total number of units. Regarding the 72 retail units, 12 are in use as convenience goods retailers, standing approximately 2.3 percentage points below the UK average. In terms of floorspace, convenience goods retailer accounts for 29.5% of total floorspace, greater than national average of 21.5%, as the result of three large food stores that are found within the town centre.

8.39 Comparison goods retailers occupy 60 of the 72 retail outlets or 39.2% of the total number of units which is above the UK average of 33.5% and can be considered an unusually high percentage in the context of its role and function as a district centre. In terms of floorspace, comparison goods retailers account for 35.5% of total floorspace which is 2.6 percentage points below the UK average.

8.40 **Table 8.6** shows that the most prevalent use in the town centre is retail and leisure services, accounting for 45.1% of the total number of units which includes restaurants, cafes, fast food, hairdressing, beauty & health along with banks & financial services and estate agents & auctioneers. Of these, restaurants, cafes and fast food are the most common, comprising 30 units or 19.6% of the total which falls broadly in line with the UK average, the town centre also has proportionate representation of hairdressing, beauty & health and banks & financial services.

Table 8.6 Diversity of uses in West Wickham district centre (Experian Goad October 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	12	7.8	10.1	-2.3
Comparison	60	39.2	33.5	+5.7
Services (Financial and business + leisure services)	69	45.1	39.8	+5.3
Vacant outlets + miscellaneous	10	6.5	15.5	-9.0
Employment, Careers, Pos& Info	2	1.3	1.0	0.3
TOTAL	153	**100%**	**100%**	**100%**

Source: Experian Goad survey, October 2023

Retailer representation and balance between independent and multiple stores

8.41 West Wickham district centre is anchored by four food stores; two Sainsbury's stores located to the northeast and west whilst the M&S Foodhall on the High Street in the centre and Lidl to the eastern side of the centre. Given the status of the West Wickham as a district centre, the presence of four national food retailers indicates that the town is healthy and attracts a consistent level of footfall. Other national retailers present in the centre include Boots (health & beauty), Specsavers (opticians), Carpetright (carpets/flooring), Savers (health & beauty), and there are Argos stores located in both Sainsbury's. The district centre is also well served by national food chains operators including Pizza Hut Takeaway, Domino's, Subway and Pizza Express, mostly takeaways. There is also Nationwide banks present in the centre, although two former banks; Barclays and NatWest have recently closed. The centre has a number of charity shops along its prime retail pitch e.g. Mind, Salvation Army.

8.42 The October 2023 Experian Goad survey identified 40 out of the 153 units are occupied by multiple retailers' equivalent to 26.1% of the total which is above the UK average of 21.5%. The centre also has a variety of independent retailers that are located sporadically along the High Street including greengrocers, independent clothing, an independent carpet store, a kitchens shop, an interiors store and bridal wear. Wickham Food Centre located on the High Street was noted to act as a further anchor store at the time of our visit to the centre. Sitting amongst these retailers is what appears to be a healthy and diverse selection of independent cafes and restaurants.

Vacant Street Level Property

8.43 At the time of the Experian Goad survey (October 2023), it was recorded that West Wickham had a total of 10 vacant units which equates to approximately 6.5% of all units which is significantly lower than the UK average of 15.5%. Upon visiting West Wickham, it was observed that 10 units on High Street, 1 on Glebe Way and 1 on Station Road (totalling 12 units across the centre), indicating there has been a recent increase in the vacancy rate in the centre. It therefore remains comfortably below the UK average and not a significant cause for concern, although it is always recommended that any trend of increasing vacancy is monitored moving forwards.

8.44 West Wickham Library located on the junction of Glebe Way and Station Road is under alteration to be redeveloped a new library building together with 26 apartments. This site occupies a prominent position within the centre, at the junction of Station Road and Glebe Road, and the development will be expected to enhance footfall in the centre upon completion.

Customers' views and behaviour

8.45 The following section sets out the findings of the household telephone survey in respect of those respondents who stated they visit/use West Wickham district centre.

Frequency of visit

8.46 18.0% of respondents who use West Wickham district centre stated that they visit at least once a week, and a further 10.6% at least twice a week. Interestingly the proportion of respondents who stated they visit daily was under 1%; for other district centres this figure ranges between 6% and 9%. Combined therefore, just under 30% of respondents who stated they use the centre visit at least once a week. This can be considered a reasonably strong level of patronage, albeit one with some scope for improvement compared to other centres in the Borough. A further 18.2% of respondents visit at least once a fortnight, and 18.0% once a month, showing that whilst the district centre does not command particularly high daily visits, it is nevertheless used on a relatively frequent basis by most users of the centre.

Main purpose of visit

8.47 Almost 30% of respondents stated their main reason for visiting the centre was for food shopping; as this assessment has identified the district centre is very well provided for in terms of convenience goods shopping options with four foodstores in the centre, and this high market share can be considered a reflection of this. 16.4% of respondents stated they visit for non-food shopping, and 14.3% for evening uses. The latter of these is particularly positive as it indicates the centre has a well-supported evening economy.

Table 8.7 Main reasons for visiting West Wickham district centre (household survey respondents)

Rank	Main purpose of visit — Petts Wood	% of responses
1	Purchasing food shopping (not click & collect)	29.3%
2	Purchasing non-food shopping (not click & collect)	16.4%
3	Evening leisure activity e.g. visiting restaurants, pubs, bars	14.3%
4	Using services such as banks or dry cleaners	6.3%
5	Going for a walk / walk the dog	5.7%

Source: household survey results

Linked trips

8.48 Almost three-quarters of respondents identified that they undertook linked trips on their visits to the district centre. Most popular were undertaking non-food shopping (19.9% of respondents), visiting cafes (18.5%) and undertaking food shopping (16.2%).

Likes and dislikes

8.49 The attributes most respondents liked about the district centre are summarised in **Table 8.8** below. In terms of what respondents liked about the district centre, its proximity to residents' place of home ranked highest (38.4%), followed shortly by choice and range of shops (34.3%), This confirms our assessment that the retail function of the centre remains strong (notwithstanding the wider changes in shopping patterns which this study has identified). Almost one-quarter of respondents also indicated the choice of places to eat as a key positive in the centre.

8.50 In terms of dislikes, it can be seen that the centre has high levels of satisfaction amongst users, with 47.2% stating that there was 'nothing' they disliked about the centre. Other responses attracted relatively low figures; 7.8% identified that did not like that the shops in the centre do not open late. The latter is likely to be a reference to the non-food shops in the centre, and we note for example that both of the Sainsbury's stores in the centre close at 10pm, and Lidl at 9pm, which can be considered relatively long trading hours.

Table 8.8 Likes and dislikes of West Wickham district centre (household survey respondents)

Rank	Attribute – most liked (West Wickham)	% of responses	Attribute – most disliked (West Wickham)	% of responses
1	Close to home	38.4%	(Nothing)	47.2%
2	Choice and range of shops	34.3%	Shops don't open late	7.8%
3	Choice of places to eat / drink (e.g. restaurants, cafes, pubs, etc.)	22.3%	Lack of choice and range of non-food shops	7.6%
4	Nice atmosphere / friendly people	17.0%	Lack of choice of services (hairdressers, banks, libraries, etc.)	7.3%
5	Choice of independent retailers	16.5%	Having to use an app for parking	6.5%
6	Cleanliness	15.7%	Not enough parking spaces	6.2%
7	Environmental quality of centre (attractive place)	14.3%	Needs more / better public toilets	6.2%
8	Compact / shops close together	14.2%	Too many charity shops	5.7%
9	Inexpensive	13.7%	Inconveniently located car parking	5.0%
10	Convenient car parking (i.e. close to shops)	13.4%	Lack of choice and range of food shops	5.0%

Source: household survey results

Pedestrian Flows

8.51 At the time of our site visit, it was observed that the main concentration of activity was around the High Street where cafes, charity shops and small retailers are located which was fairly busy. The car park located on Ravenswood Avenue that serves High Street, Sainsbury's and Boots was busy with approximately 60% of spaces occupied. Foodstores including both Sainsbury's, M&S and Lidl were observed to be busy with shoppers. Footfall across the district centre could overall be considered to be moderate.

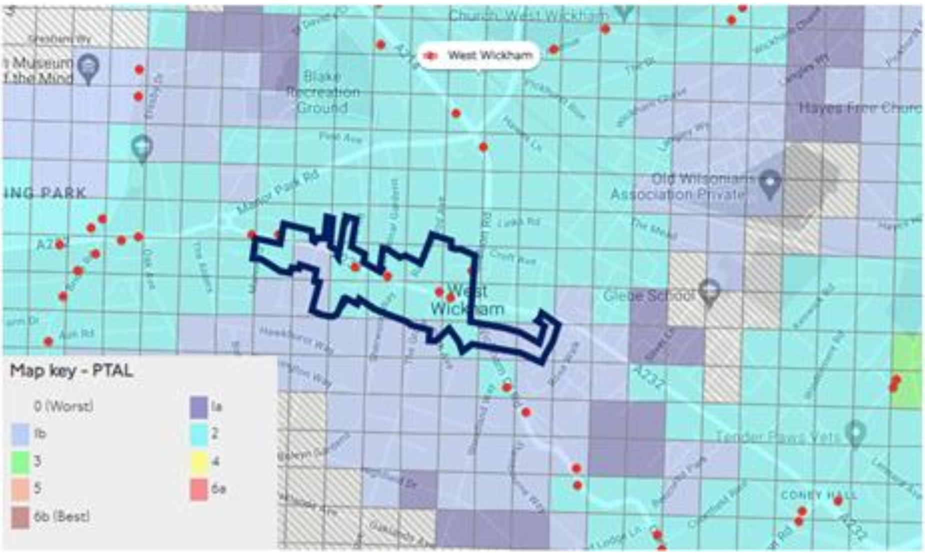
Accessibility

8.52 West Wickham can be considered to have poor levels of accessibility through public transport, as shown in **Figure 8.5**, the majority of the defined district centre has a PTAL rating of 2, representing basic access to public transportation services. West Wickham Railway Station is located approximately 600 meters north of the High Street, providing services to London Charing Cross, London Bridge, Beckenham, Lewisham and Catford Bridge every 15 minutes, with services in the other direction terminating at nearby Hayes.

8.53 The town centre is also served by a number of bus routes, with bus stops located either side of the High Street which provide good access to the wider town centre. The bus routes are set out below:

- Route 119 connects West Wickham to Waddon and Croydon towards southwest and to Bromley North via Coney Hall, Hayes and Bromley northwards which operates every 10 minutes.
- Route194 connects West Wickham to Croydon southwards, Bell Green towards northwest via Elmers End, Beckenham and Penge operates every 10 minutes.
- Route 352 connects West Wickham to Bell Green via Beckenham north-westwards and northwards to Bromley North which operates every 20 minutes during the daytime.

Figure 8.5 PTAL map for West Wickham (annotated to show town centre boundary)



Base map source: Transport for London. Note – bus stops denoted by red dots

8.54 The district centre has several car parks. A car park to the west of High Street with 146 spaces is for Sainsbury's customers only with two hours of free parking restriction. Further car parking is available on Ravenswood Avenue. There are also further car parks to the north of the centre, including a car park operated by LBB at West Wickham Leisure Centre (64 spaces) and a further car park adjacent to the railway station (135 spaces). A 118 space car park is situated on the southern side of High Street, behind Carpetright and Wickham Food Centre, this car park is operated by LBB at a cost of £1.60 for a two hour stay.

Perception of Safety and Occurrence of Crime

8.55 In reference to data published by London Metropolitan Police and as shown in **Table 8.9**, a total of 80 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was theft and shoplifting. Across the last 6 months the number of crimes recorded ranged from 19 in March 2024 to 11 in November/December 2023 and overall the levels of reported crime in the centre appear relatively low. The centre felt safe upon visit in March 2024, no damage to property or graffiti was seen.

Table 8.9 Crime statistics for West Wickham, November 2023 – April 2024

West Wickham	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	1	0	2	1	1	0	**5**
Burglary	1	0	1	0	3	3	**8**
Criminal Damage and Arson	0	0	0	1	0	1	**2**
Drugs	0	0	0	1	1	0	**2**
Possession of Weapon	0	0	0	0	0	0	**0**

Public Order	0	2	0	1	0	0	**3**
Shoplifting	4	1	3	2	6	2	**18**
Theft	4	4	2	2	5	4	**21**
Vehicle Crime	1	0	3	1	0	0	**5**
Violence and Sexual Offences	0	4	1	0	0	1	**6**
other crime	0	0	1	4	3	2	**10**
Total	**11**	**11**	**13**	**13**	**19**	**13**	**80**

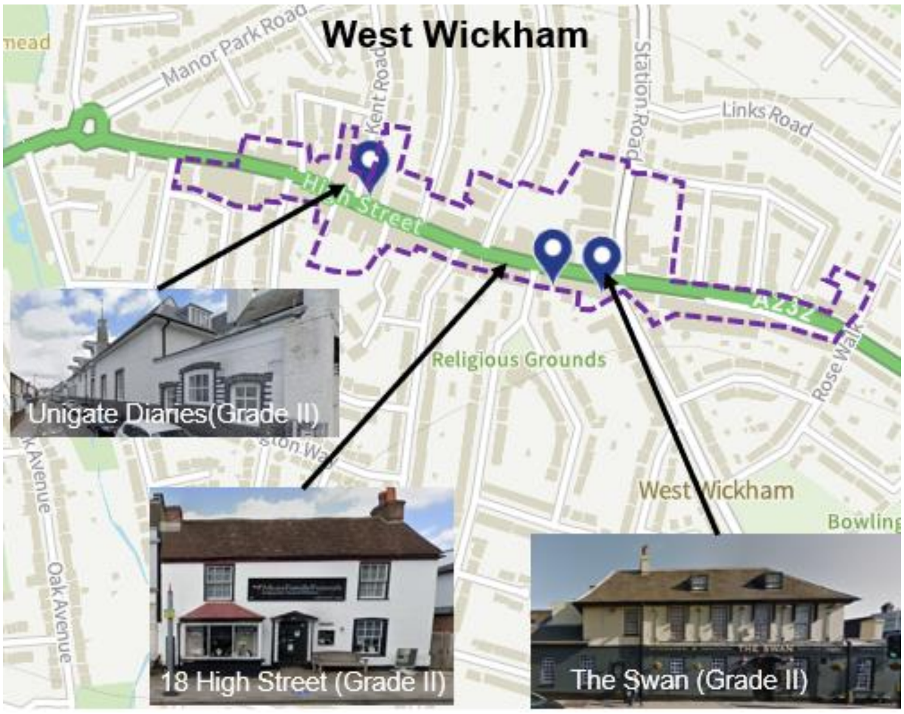
*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

8.56 West Wickham district centre benefits from a positive environmental quality with clean footpaths and roads, some trees along the High Street and Station Road. There are a few small areas with some plantation on Station Road in front of Boots and Sainsbury's on the footpath. However, there are no green areas on the High Street other than a few trees. Footpaths were clean and largely rubbish free and there was no visuals of damage or graffiti on the High Street.

8.57 There are three Grade II listed buildings located on the High Street within the district centre boundary, the Swan Pub, 18 High Street and Unigate Diaries on Kent Road as shown in **Figure 8.6** below. The Swan Pub in particular makes an active contribution to the overall positive visual appearance of the town centre. There is no Conservation Area covering the district centre.

Figure 8.6 Heritage assets in West Wickham district centre



Source: Historic England base map with Firstplan annotations

Conclusion

8.58 West Wickham can be considered to be a strong performing district centre, benefiting from a good level of environmental quality and a safe and generally attractive streetscene. Its vitality is attributable to the fact there are four good-sized foodstores located at key gateways and throughout the centre, which help drive footfall through the length of the centre. Unusually for a district centre there is also a strong comparison goods shopping offer, particularly in terms of specialist home goods retailers, which might pull in visits to the centre from a wider catchment than may typically be expected for a district centre.

Table 8.10 Summary of strengths and weaknesses of 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.

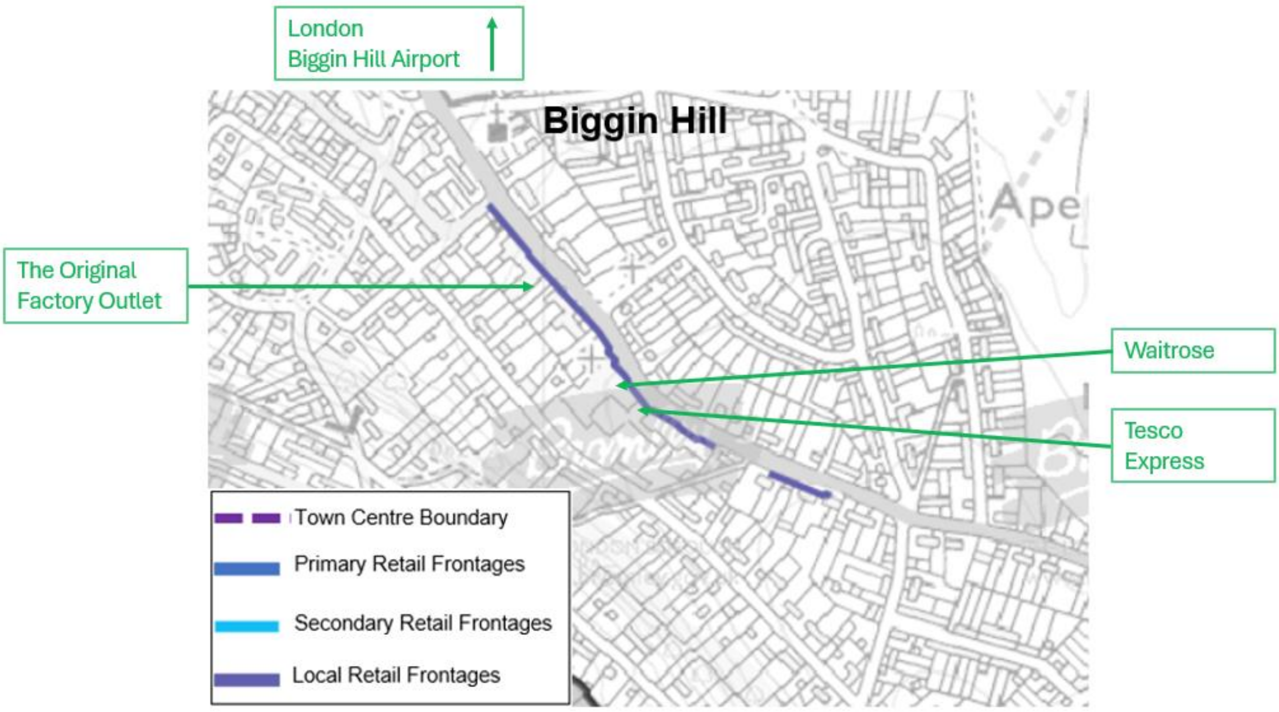
SECTION 9 | TOWN CENTRE HEALTH CHECKS — LOCAL CENTRES

9.1 In this section we set out an assessment of the vitality and viability of the five local centres in LBB — **Biggin Hill, Chislehurst, Hayes, Locksbottom and Mottingham**.

Biggin Hill local centre

9.2 Biggin Hill is a small local centre at the southern tip of the Borough, serving the residential settlement of Biggin Hill — one of the few parts of the Borough detached from the Greater London conurbation — and surrounding villages. The centre is anchored by a Waitrose supermarket, and also includes a Tesco Express, The Original Factory Shop, Costa Coffee, Domino's and Boots pharmacy. The centre is well served by independent retailers, charity shops, hair salons, cafes and small convenience shops located on the Main Road. The defined 'local retail frontage' within the centre sits entirely along a linear stretch of Main Road; on the opposite side of the road are largely residential uses. **Figure 9.1** shows the extent of the local retail frontage within the centre as defined by the Local Plan.

Figure 9.1 Retail frontages in Biggin Hill Local centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses and retailer representation

9.3 The most recent assessment of the diversity of uses of Biggin Hill local centre is the Experian Goad Survey of the centre, which was undertaken in May 2023. Firstplan undertook site visit to Biggin Hill local centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. Firstplan undertook site visit to Biggin Hill in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses in the town is shown in **Table 9.1**. It shows that the Biggin Hill local centre contains 47 units in total and is therefore a relatively small centre, with retail (comparison and convenience) comprising 20 of these, totalling 42.5% % of the total number of units. Regarding the 20 retail units, 8 are in use as convenience goods retailers, standing 6.9 percentage points above the UK average. The centre also has a variety of independent retailers that are located along the Main Road including greengrocers, butchers, dry cleaners, funeral directors, opticians and a gift shop.

9.4 **Table 9.1** shows that the most prevalent use in the town centre is retail and leisure services, accounting for 48.9% of the total number of units which is 9.1 percentage points above the UK average. Of these, restaurants, cafes and fast food are the most common, comprising 12 units or 25.5% of the total, which is above the UK average of 18.8%. Hair & beauty uses are also well represented in the centre.

Table 9.1 Diversity of uses in Biggin Hill local centre (Experian Goad, May 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	8	17.0	10.1	+6.9
Comparison	12	25.5	33.5	-8.0
Services (Financial and business + leisure services)	23	48.9	39.8	+9.1
Vacant outlets + miscellaneous	3	6.3	15.5	-9.2
Employment, Careers, Pos& Info	1	2.1	1.0	1.1
TOTAL	**47**	**100%**	**100%**	**100%**

Source: Experian Goad survey, May 2023

9.5 The local centre is anchored by Waitrose and Partners supermarket and a Tesco Express which are located on the Main Road. The presence of a large food store (Waitrose) within the local centre means it acts as the anchor store and is likely to be responsible for driving inward traffic and supports other shops and service within the centre. Other key national retailers include Boots pharmacy, Costa Coffee, Domino's and The Factory Outlet Shop. The centre has small independent cafes and takeaways, a curry house, Biggin Hill Social and Sports Club and a Chinese restaurant.

Balance Between Independent and multiple Stores

9.6 The Experian Goad survey of Biggin Hill local centre (May 2023) identified 13 out of the 47 units are occupied by multiple retailers' equivalent to 27.6% of the total which is above the UK average of 21.5%, an unusual trend for a local-scale centre although this analysis has to be considered in the context that the centre as a whole is relatively small in terms of total number of units.

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Vacant Street Level Property

9.7 In accordance with May 2023 Experian Goad data, Biggin Hill had a total of three vacant units which equates to approximately 6.3% which is significantly lower than the UK average of 15.5%. Upon visiting Biggin Hill in March 2024, it was observed that there were still three vacant units on Main Road, and therefore the centre continues to benefit from a low vacancy rate. Some units identified as vacant on the Experian Goad Data seen in **Table 9.1** were occupied. Units shown as vacant by May 2023 Experian Goad data such as 128 Main Road, which is now occupied by a café, 216 which provides security services and 222 which is now in use as a nail salon. Units 190B and 160a which were previously in use as a café and a convenience store but are now vacant.

Pedestrian Flows

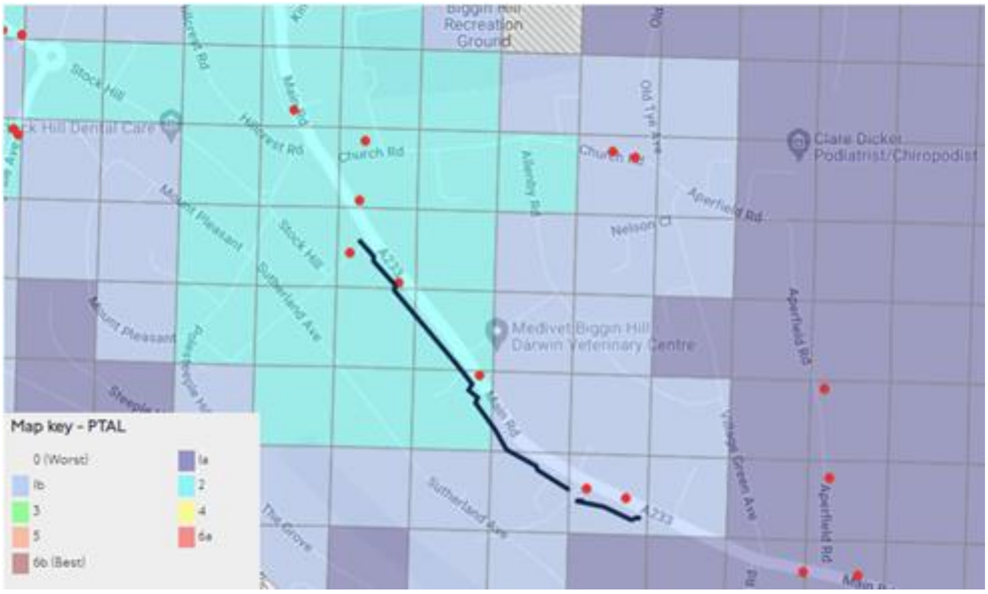
9.8 The main concentration of activity was around the Main Road where Tesco Express and Waitrose is located, with the latter store clearly fulfilling the role of the 'anchor' store within the centre. Other places such as cafes and salons were observed to be busy on the day of our visit to the centre.

Accessibility

9.9 Biggin Hill can be considered to benefit from poor levels of accessibility through public transport, as shown in **Figure 9.2,** the majority of the defined local centre has a PTAL rating of between 1b to 2, representing only limited access to public transport services. The PTAL rating for the centre is the lowest of any centre in the Borough, which is essentially a reflection of the fact it is a rural settlement outside of the main urban area of the Borough. There is no railway service available for Biggin Hill and the closest railway stations are located approximately 7km away in both Orpington and Woldingham. In terms of local bus routes, it is positive to note that notwithstanding its relatively detached nature, the centre is served by a good network of bus connections, although most services only run at 30 minutes intervals or less:

- Route 246 connects Biggin Hill to Bromley northwards and Westerham to the south which operates every 30 minutes during the day time.
- Route 320 is a higher frequency route through the centre and connects Biggin Hill to Catford Bridge via Leaves Green, Bromley Common, Bromley town centre and Downham which operates every 12 minutes during the daytime.
- Route 464 connects Biggin Hill to New Addington and Tatsfield which operates every 30 minutes during the day time.
- Route R2 connects Biggin Hill with Orpington via Leaves Green and Locksbottom which operates every 30 minutes during the day time.
- Route R8 connects Biggin Hill with Orpington via Berry's Green and Downe, but only operates every 90 minutes during the day time.

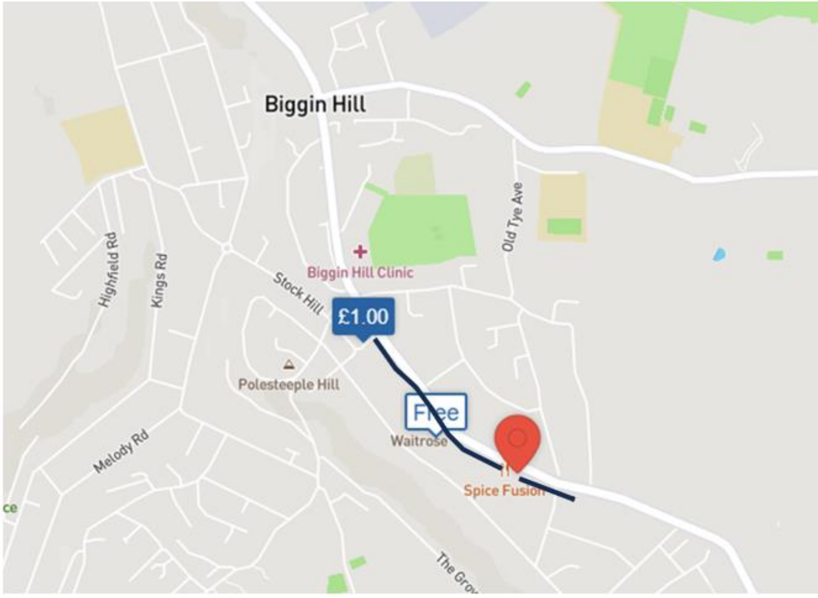
Figure 9.2 PTAL map for Biggin Hill local centre (annotated to show defined local shopping frontages)



Base map source: Transport for London. Note – bus stops denoted by red dots

9.10 Biggin Hill has two car parks as well as limited numbers of on street parking spaces with 30 minute limit applied between 8am to 6:30pm. The car park to the northwest of the centre is operated by LBB which has 26 spaces and car park to the south is for Waitrose customers only with two hours free parking restriction. Both of the surface car parks were observed to be at approximately 50% occupancy at the time of our visit.

Figure 9.3 Car parking provision around Biggin Hill local centre



Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Biggin Hill local centre

Perception of Safety and Occurrence of Crime

9.11 In reference to data published by London Metropolitan Police and as shown in **Table 9.2** a total of 125 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was theft and shoplifting which occurred 35 times. Across the last 6 months the number of crimes recorded ranged from 29 in January 2024 to 14 in March 2024. Upon visiting the centre in March 2024, no antisocial behaviour was observed.

Table 9.2 Crime statistics for Biggin Hill, November 2023 – April 2024

Biggin Hill	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	1	0	2	1	1	0	**5**
Burglary	1	0	1	0	3	3	**8**
Criminal Damage and Arson	0	0	0	1	0	1	**2**
Drugs	0	0	0	1	1	0	**2**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	0	2	0	1	0	0	**3**
Shoplifting	4	1	3	2	6	2	**18**
Theft	4	4	2	2	5	4	**21**
Vehicle Crime	1	0	3	1	0	0	**5**

Violence and Sexual Offences	0	4	1	0	0	1	**6**
other crime	0	0	1	4	3	2	**10**
Total	**11**	**11**	**13**	**13**	**19**	**13**	**80**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

9.12 Biggin Hill local centre benefits from a positive environmental quality with clean footpaths and roads, some trees along the Main Road where shops are located to the western side and green on the footpath with trees on the eastern side. There are a few small wooden blocks used as flower beds on the Main Road which provide animation and enhance the environmental quality. Footpaths were clean and largely rubbish free and there was no visuals of damage or graffiti on the High Street.

Waitrose and St Christopher's Hospice stores on Main Road

The Original Factory shop on Main Road is the main comparison goods anchor store in the centre. The wide footpaths which the centre benefits from can also clearly be seen here.

9.13 The centre benefits from wide pavements along its western side which benefits the environmental quality and assists pedestrian movement through the centre. There is scope for some of the paving immediately outside the parade of units between the 'On The Beach' beauty salon and the 'Spitfire' café to be improved to match that of the rest of the centre, rather than the tarmac surface which is currently in place. Further planting could potentially also be considered, although there are large trees fronting the road and hanging baskets already in place.

9.14 There are few crossings along the Main Road without the traffic lights. However, due to the low level of congestion it seems safe to cross.

Conclusions

9.15 The local centre displays positive signs of vitality and viability. As with other district and local centres it is anchored around a large foodstores (in this case Waitrose) which anchors the wider retail offer and can be considered to generate linked trips and footfall with the rest of the centre. There are a good range of supporting services including two pharmacies, cafes and a dry cleaners. The Original Factory Shop is a useful secondary anchor to the centre in terms of meeting a range of day to day convenience and comparison needs.

9.16 The centre feels more 'village like' and remote compared to the Borough's more urban centres, and is likely to have a clearly defined catchment which relates to the settlement itself and surrounding villages. In this context, we consider it to be performing its local centre function well. There is scope for some investment to smarten up the centre in places, but this matter aside we consider it to be performing well.

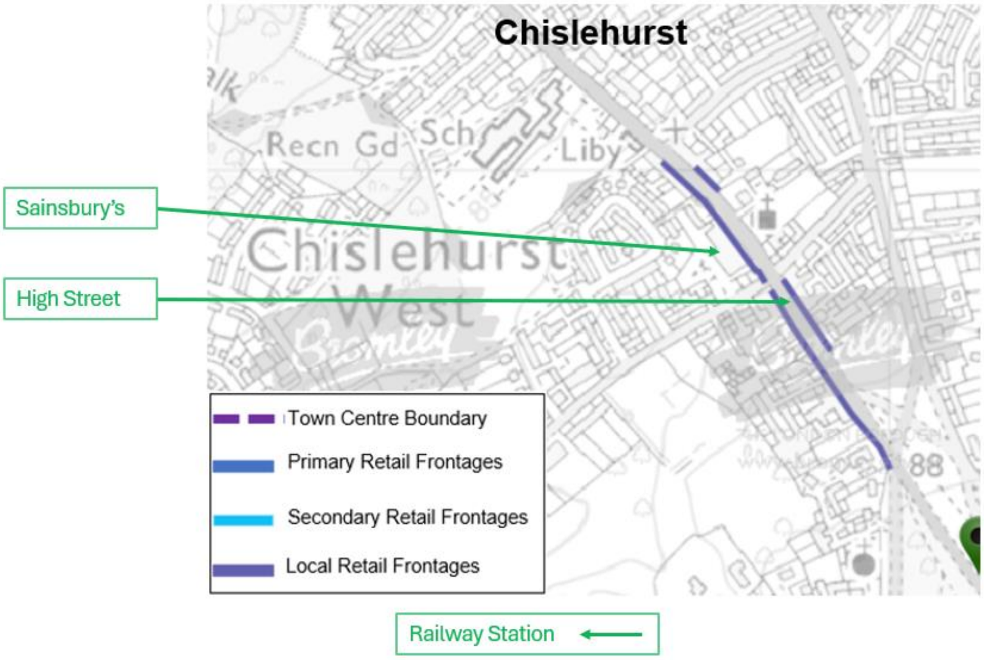
Table 9.3 Summary of strengths and weaknesses of Biggin Hill local centre

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

9.17 Chislehurst is an attractive local centre situated approximately 4km to the north of Bromley town centre. The local centre is in one of the most leafy, open parts of the Borough and the High Street being situated adjacent to expansive areas of open green space, including the attractive setting of Prickend Pond and its associated open space adjacent to the local centre, and Chislehurst Commons to the immediate south of the centre.

Figure 9.4 Retail frontages in Chislehurst Local centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

9.18 The linear High Street is anchored by a Sainsbury's which is found towards the northern section of the centre. The centre is supported by a collection of commercial units that are found approximately 800 metres to south along Royal Parade (which are classified under the Local Plan as a separate neighbourhood centre), which are predominantly occupied by upmarket restaurants and cafes, supplementing the generally high end offer that is seen in the main local centre. The 'local retail frontages' which demarcate the local centre (as defined by the adopted Local Plan) are shown in **Figure 9.4.**

Diversity of uses and retailer representation

9.19 The most recent assessment of the diversity of uses within Chislehurst is the Experian Goad survey of the centre which was undertaken in February 2023, which provides an assessment of the current mix of retail and services uses in the local centre. Firstplan undertook site visit to Chislehurst local centre in February 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. A summary of the diversity of uses is shown in **Table 9.4**. It shows convenience goods and comparison goods retail representation in the centre to both be under-represented against UK averages, with comparison goods particularly under-represented, although in the context of Chislehurst's role and function as a local centre such a trend is not a particular concern.

9.20 Of particular note from **Table 9.4** is the high proportion of retail and leisure services in the centre, which are shown as being 17.3 percentage points above the current UK average. Analysis of the Experian Goad data confirm this to be driven in particular by a large number of food & drink outlets, with a particular strength in cafes and restaurants. This is the result of Chislehurst's affluent status and upmarket setting which lends itself to being the destination of leisure services rather than meeting the day-to-day shopping needs of local residents.

The Queen's Head Pub is found adjacent to Chislehurst Common and benefits from a large outdoor area that is well maintained. The hair & beauty sector is also well represented in the centre, with a total of 12 units.

Table 9.4 Diversity of uses in Chislehurst local centre (Experian Goad, February 2023)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Convenience	5	7.1	10.1	-3.0
Comparison	19	27.1	33.5	-6.4
Services (Financial and business + leisure services)	40	57.1	39.8	+17.3
Vacant outlets + miscellaneous	5	7.1	15.5	-8.4
TOTAL	**70**	**100%**	**100%**	**100%**

Source: Experian Goad survey, February 2023

9.21 In terms of retailer representation, the key retailer operator identified within Chislehurst is the Sainsbury's supermarket which is found towards the northern section of the High Street and acts the principle 'anchor' store, providing scope for linked trips to the wider High Street due to its dedicated car park which is free for customers for up to a two hour stay.

9.22 Chislehurst lacks representation from national retailers and instead predominantly made up of independent operators and indeed this is likely to be part of the overall appeal of the centre. The offer is noticeably 'high end' and contains types of retailers not typically found in a local centre, in particular there are a high number of independent clothing stores; Fortuny London, Bela Fashions and The Chislehurst Boutique. Other independent specialist retailers include Louis Baron furniture store and Cook & Matthews Sport. The type of retailer appears to fit the affluent nature of the area, but the lack of 'day to day' shopping and retail services facilities for residents is noticeable. However, the centre does contain a pharmacy and an opticians and many day to day shopping needs are also likely to be met by the Sainsbury's store.

9.23 A collection of national restaurant chains are found along the High Street, including Zizzi, Côte and Giggling Squid. The district centre also contains a number of independent restaurants such as Fitology Kitchen, Ole Hyiv and Cinnamon Culture. The centre also features nationally operated coffee shop chains including Costa Coffee and Caffè Nero whilst the centre also contains several independent operators namely Resta Coffee and Joelle's of Chislehurst, amongst others. A large pub, the Queen's Head, sits centrally within the local centre adjacent to Prickend Pond and its associated open space. Overall, the leisure offer of the centre appears particularly strong and is the centre's 'USP'. The strength of the offer means that the centre is likely to cater for more than a local catchment area in respect of these type of uses and act as something more of a 'destination'.

Vacant Units

9.24 Chislehurst has a vacancy rate of 7.1% which is markedly lower than the most up to date UK average of 15.5% recorded in October 2023 which indicates that the district centre is displaying strong levels of viability and vitality. Upon visits to the High Street, it was noted that there is not a discernible grouping of vacant units, suggesting that there is not a particular area of the High Street that lacks footfall. Since the Goad survey was undertaken in April 2023, there has been one change to the vacant units in the centre, with the formerly vacant 16A High Street now occupied by Luminus beauty salon.

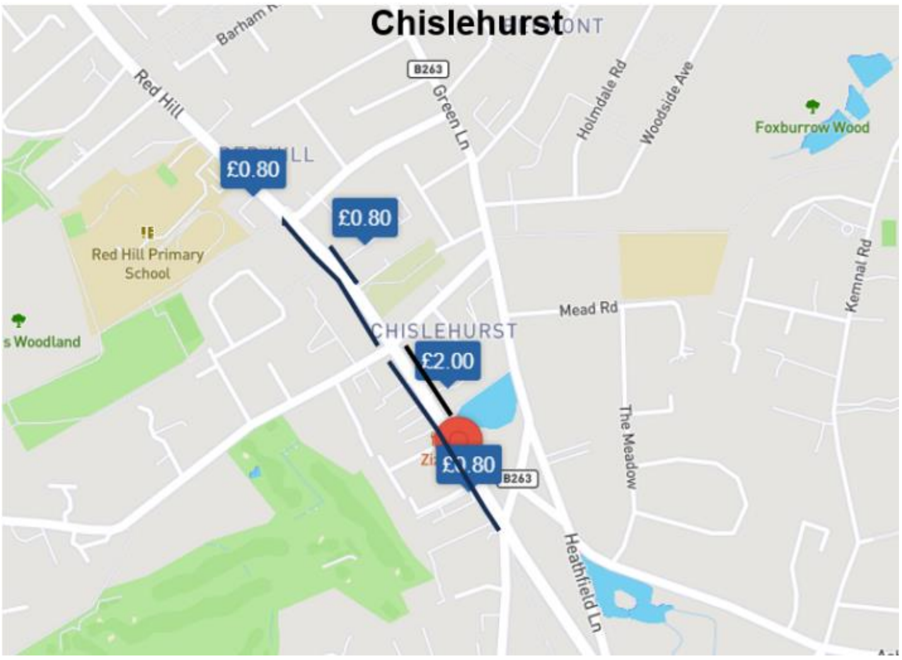
Pedestrian flows

9.25 Having undertaken visits to Chislehurst, we observed good levels of footfall along the entirety of the High Street. It was observed that pedestrian activity increased towards the southern area of the High Street, near Prickend Pond which benefits from a walkway around its entirety and has multiple seating areas which incentivises footfall and acts as both a landmark and environmental asset for the centre.

Accessibility

9.26 Chislehurst High Street is situated along the A208 which provides connections to Mottingham to the north and Orpington to the south. There are a number of car parks found in and around the High Street. Car parking spaces are found within the central area of the High Street, with a series of bay parking bays along the western side of the road which provides convenient access to the adjacent shops and restaurants. A total of 44 spaces are found within this central area, at a cost of £1.10 per hour. In addition, council-run off-street car parks are situated at the southern and northern ends of the High Street at a cost of £1.40 for a 2 hour stay.

Figure 9.5 Car parking provision around Chislehurst local centre

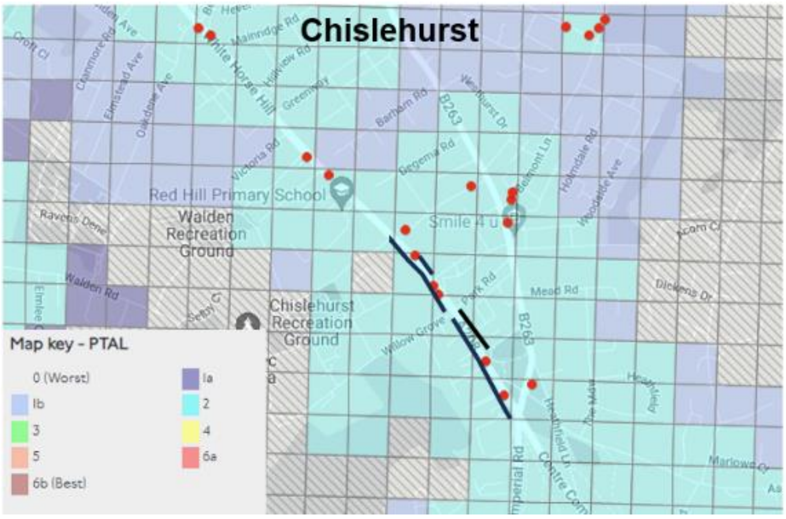


Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Chislehurst local centre

9.27 As shown in **Figure 9.6**, the entirety of the local centre has a PTAL rating of 2 which indicates 'poor' access to public transportation. In terms of bus services, the centre is only served by three bus routes, which is the lowest level of service of any of the town, district and local centres in the Borough: the 160 service provides connections to Catford heading to the west and Sidcup to the east, operating every 15 minutes. The 162 that operates approximately every 15 minutes, connects to Chislehurst War Memorial to the south and North Greenwich further to the north. The 273 bus connects to Petts Wood to the south and Lewisham and Hither Green to the north west, operating every 20 minutes.

9.28 Chislehurst Railway Station is located approximately 1.5km to the south of the High Street and there is a steep gradient walking up from the station to the High Street meaning that majority of visitors would not access the centre via the railway station. However, the 162 bus route provides connections between the two areas and operates every 15 minutes.

Figure 9.6 PTAL map for Chislehurst local centre (annotated to show defined local shopping frontages)



Base map source: Transport for London. Note – bus stops denoted by red dots

Perception of crime and safety

9.29 In reference to data published by London Metropolitan Police and as shown in **Table 9.5**, a total of 34 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was violence and sexual offence which. Across the last 6 months the number of crimes recorded ranged from 9 in February 2024 and 3 in March/April 2024. Upon visiting in March 2024, the local centre felt safe and there was no evidence of antisocial behaviour.

Table 9.5 Crime statistics for Chislehurst, November 2023 – April 2024

Chislehurst	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	1	0	2	1	1	0	5
Burglary	1	0	1	0	3	3	8
Criminal Damage and Arson	0	0	0	1	0	1	2
Drugs	0	0	0	1	1	0	2
Possession of Weapon	0	0	0	0	0	0	0
Public Order	0	2	0	1	0	0	3
Shoplifting	4	1	3	2	6	2	18
Theft	4	4	2	2	5	4	21
Vehicle Crime	1	0	3	1	0	0	5
Violence and Sexual Offences	0	4	1	0	0	1	6
other crime	0	0	1	4	3	2	10
Total	**11**	**11**	**13**	**13**	**19**	**13**	**80**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

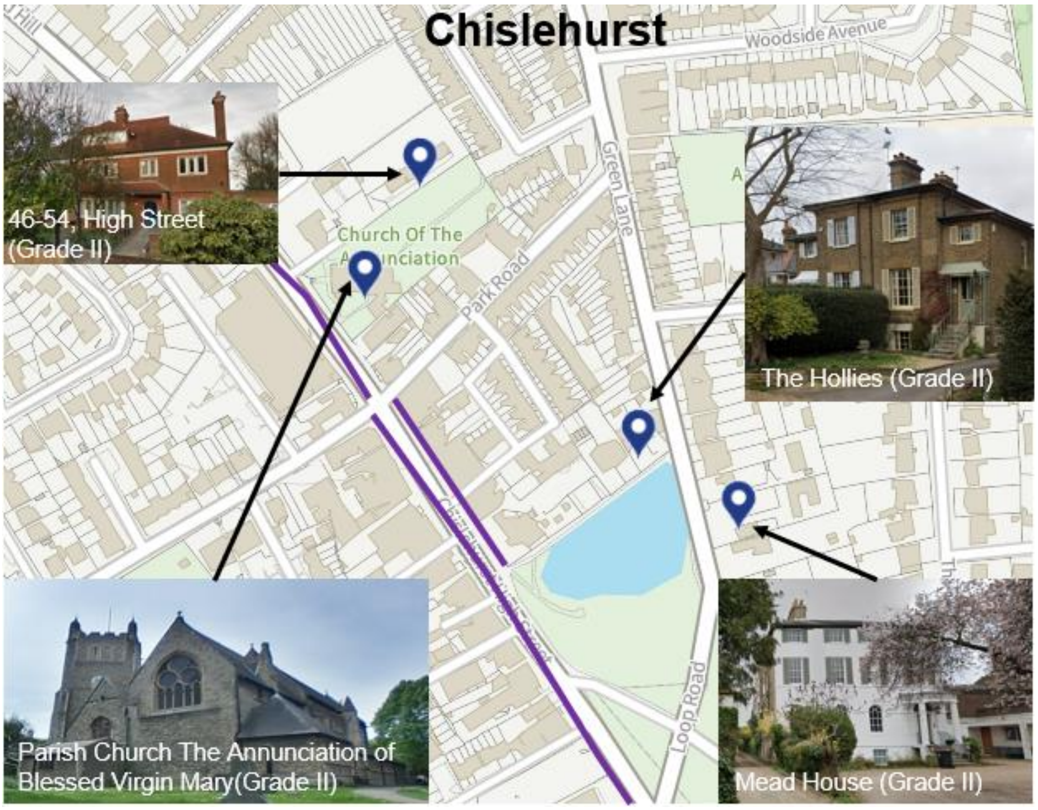
9.30 Chislehurst is a picturesque and affluent centre which benefits from being adjacent to Chislehurst Common, an 72ha area of open space that contains woods, grassland and several ponds that has been protected and maintained by a board of trustees since the late 19th century. The northern section of the common faces onto the southern end of the High Street and is a key contributor to the visual attractiveness of the centre. In particular, Prickend Pond which is adjacent to the Queen's Head Pub, acts a key landmark that creates the picturesque setting around the southern end of the High Street.

Prickend Pond at the southern end of the local centre is a key asset to the centre's environmental quality

High Street looking north from the Queen's Head pub

9.31 The high street is found within the Chislehurst Conservation Area, formerly adopted in 2022, which covers the entirety of the defined local centre boundary and encompasses the majority of the surrounding Chislehurst residential area. The High Street can be described as being historic in nature, featuring a consistent 19th century architecture style, with many of the shopfronts retaining original Edwardian pilasters. The shopfronts are well maintained and are modern in appearance. Despite the architectural quality of the buildings along the High Street, there is a lack of statutorily listed buildings, as shown in **Figure 9.7.** The centre benefits from wide pavements, in conjunction with a series of mature trees that line the roadway which creates an attractive streetscene. We do not identify any concerns in respect of the environmental quality of the centre.

Figure 9.7 Heritage assets in Chislehurst local centre



Source: Historic England base map with Firstplan annotations

Conclusion

9.32 Overall, it is considered that Chislehurst is currently demonstrating positive levels of vitality and viability. The retail offer for the centre is unusual for a local centre and is very upmarket and boutique in nature, meaning that more day to day facilities are less well represented. The leisure can also be considered upmarket, particularly in regard to the range of high quality restaurants that are provided. Chislehurst's principal strength is the attractiveness of the town centre, with elements of period architecture and areas of green space which create a high quality public realm. Overall, the vitality of and viability of the town centre can be considered strong and is in a robust position as a leisure destination which is not reliant on retail uses to maintain footfall.

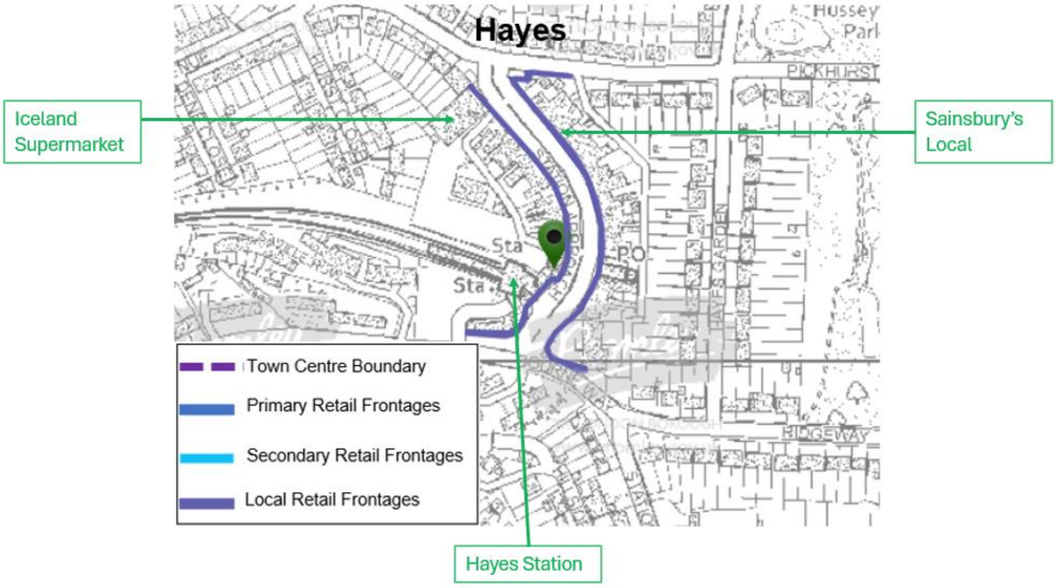
Table 9.6 Summary of strengths and weaknesses of Chislehurst local centre

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

9.33 Hayes is a small local centre in the west of the Borough, approximately 1.7km to the east of West Wickham district centre. The centre is set either side of Station Approach, with Hayes railway station (terminus of the Southeastern commuter line to London Charing Cross via Catford) centrally located within the centre. The current Local Plan policy map of the centre is shown in **Figure 9.8.**

Figure 9.8 Retail frontages in Hayes local centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses and Retailer Representation

9.34 An Experian Goad survey of the centre was undertaken in June 2023, Firstplan undertook a site visit to Hayes local centre in March 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. The Goad survey shows that centre has 73 units in total, with retail (comparison and convenience) comprising 32 of these, totalling 43.9% of the total units. Six of the retail units are in use for convenience goods, and 26 for comparison goods (the latter figure can be considered relatively high given the role and function of Hayes as a local centre). Retail and leisure services account for over half of all units in the centre (39 units, equivalent to 53.4% of the total).

9.35 The local centre is anchored Iceland and Sainsbury's superstore which are located on the northern side of the Station Approach. Given the status of Hayes as a local centre, the presence of two national food retailers indicates that the town is healthy and attracts a consistent level of footfall. Other key national retailers include Boots pharmacy, Day Lewis pharmacy and Costa Coffee. The centre is well served by independent retailers such as butchers, bakers, cafes, hair and beauty salons, post office and charity shops which are all located on Station Approach. Six units out of the 73 in the centre are occupied by national / multiple retailers, which is reflective of its role and function, and confirms the offer in the centre to be predominantly orientated towards the independent sector.

Iceland store which forms one of the 'anchors' to the local centre

Station Approach with Hayes station in background

Vacant street level property

9.36 The Experian Goad survey conducted in June 2023 shows 1 vacant unit however, on visit of the centre in March 2024 it was noticed that there were two vacant units — 14 Bourne Way and 32 Station Approach. Nevertheless, the vacancy rate in the centre is evidently low and does not present cause for concern.

Pedestrian Flows

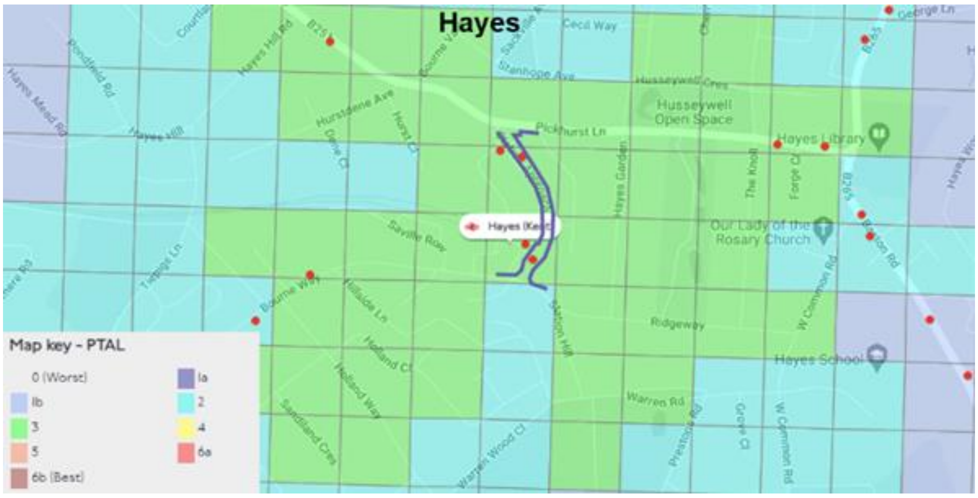
9.37 At the time of our visit, Station Approach as a whole was fairly busy due to being a small parade with shops on both sides. The train station, charity shops, cafes and convenience stores were all observed to be fairly busy on the day of our visit in March 2024. Footpaths are fairly wide on both sides of the road with islands in the middle of the road with small section for pedestrian crossing making it easier for people to manoeuvre especially with pushchairs and trollies.

Accessibility

9.38 The local centre scores more poorly compared to many other centres in the Borough in terms of accessibility, with a PTAL score of 3. The presence of the railway station within the centre clearly assists with accessibility, although in reality the role and function of the centre means few users of the centre would be likely to access it by train. Nevertheless, Station Approach is also served by five bus routes, and notwithstanding the relatively low PTAL score we consider that the centre has a reasonably good level of accessibility from its surrounding residential catchment who would look to the centre for day to day shopping needs.

- route 119 (Bromley North to Croydon Purley Way via Hayes and Croydon town centre)
- route 138 (Bromley to Coney Hall)
- route 246 (Bromley to Westerham via Hayes and Biggin Hill)
- route 314 (Eltham to New Addington via Elmstead Woods, Bromley and Hayes)
- route 353 (Orpington Ramsden Estate to Forestdale via Hayes and Addington)

Figure 9.9 PTAL map for Hayes local centre (annotated to show retail frontages)



Base map source: Transport for London. Note – bus stops denoted by red dots

9.39 Hayes contains two car parks either side of the railway station. The car park to the south of the station is operated by APCOA Parking (UK) Limited which has 117 spaces and the car park to the north is operated by London Borough of Bromley which has 127 spaces. There is on street paid parking with time restrictions is also available for shoppers on Station Approach with approximately 45 spaces, and this was observed to have a high level of occupancy at the time of our visit. Pedestrian movement around the centre appears satisfactory, with pavements of a reasonable with and in good condition, and a number of clear identifiable crossing points across Station Approach.

Figure 9.10 Carparking provision in vicinity of Hayes local centre

Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Hayes local centre

Perception of Safety and Occurrence of Crime

9.40 In reference to data published by London Metropolitan Police and as shown in **Table 9.7**, a total of 65 offences were recorded between November 2023 and April 2024. The most common crime that was recorded was violence and sexual offence which occurred 14 times. Across the last 6 months the number of crimes recorded ranged from 14 in January 2024 to 5 in April 2024.

Table 9.7 Crime statistics for Hayes, November 2023 – April 2024

Hayes	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	Total
Antisocial Behaviour	0	1	1	0	1	0	3
Burglary	0	0	3	3	1	0	7
Criminal Damage and Arson	3	0	3	1	1	0	8
Drugs	0	0	0	0	1	0	1
Possession of Weapon	0	0	0	0	0	0	0
Public Order	2	0	0	2	1	2	7
Shoplifting	0	2	1	2	1	0	6
Theft	1	1	1	1	1	2	7
Vehicle Crime	0	1	0	0	0	0	1
Violence and Sexual Offences	3	5	2	0	3	1	14
other crime	1	0	3	1	6	0	11
Total	10	10	14	10	16	5	65

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

9.41 Hayes local centre benefits from a positive environmental quality with wide clean footpaths and roads, tress in the middle of the road which acts a carriage separator along with raised grassed areas used for flowers as seen in the images above Footpaths were clean and largely rubbish free and there was no visuals of damage or graffiti on the Station Approach. There are no traffic lights operated crossings along the Station Approach. However, due to the low level of congestion it seems safe to cross. There are no listed buildings according to Historic England in the vicinity of the local centre.

Conclusion

9.42 We consider Hayes to be a strong performing local centre which is able to meet a range of day to day shopping needs. The Iceland and Sainsbury’s Local stores are strong anchors to the centre, and the vacancy rate is very low. The presence of the railway station in the centre aids footfall and likely contributes to the overall vitality of the centre.

Table 9.8 Summary of strengths and weaknesses of Hayes local centre

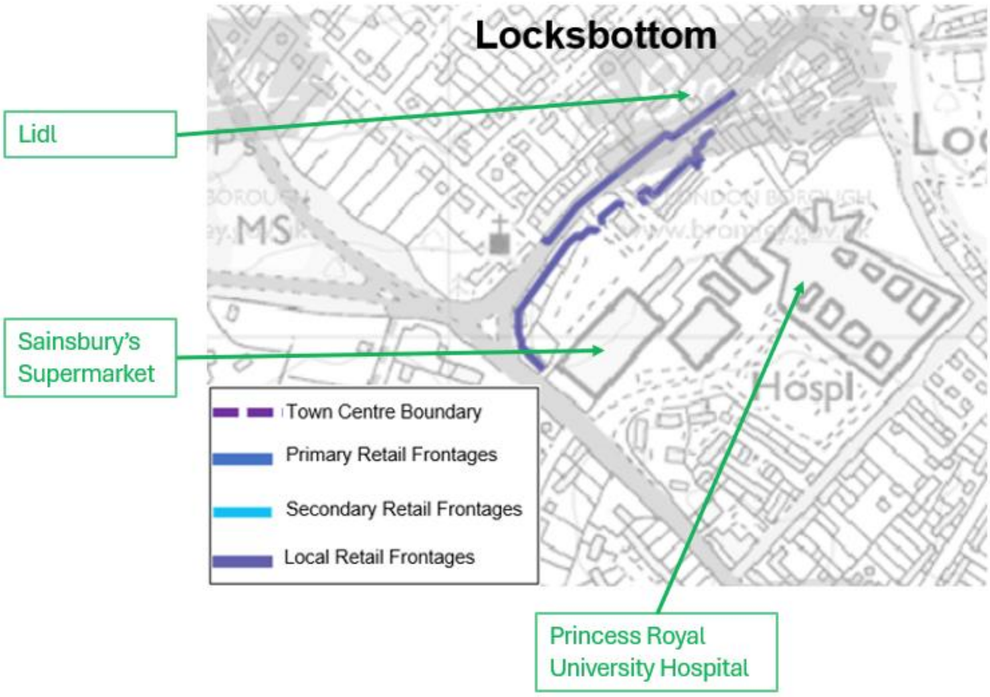
Strengths	Weaknesses
• Meets a range of local / day to day shopping • Good anchor stores • Station contributes to overall vitality and footfall	• No significant weaknesses identified.

Locksbottom local centre

9.43 Locksbottom is a local centre that is located approximately 4.5km to the south of Bromley town centre. It sits towards the southern edge of the Greater London conurbation and is immediately adjacent to the Princess Royal University Hospital. The centre is well maintained, predominantly comprising of two shopping parades that are located on either side of Crofton Road. The parade that is located on the northern side of Crofton Road has a Tudor-style architectural design, comprising of black timber and white plaster which makes a positive contribution to the visual attractiveness of the centre. On the opposite side of the road lies Princess Parade, a 1970’s style parade of shops which contains residential dwellings above a series of ground floor commercial units. A large Sainsbury’s supermarket sits to the rear of the southern side of the centre.

Western end of the local centre on Crofton Road

Figure 9.11 Retail frontages in Locksbottom local centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of uses and retailer representation[50]

9.44 Upon visiting Locksbottom in February 2024, the local centre provides a good retail offering, containing both a Lidl and a Sainsbury's which are considered the 'anchor' units. Sainsbury's contains both a clothing and homeware section, and an in-store Argos concession. In terms of other national operators, Costa Coffee is found in the main parade of shops located on the northern side of Crofton Road, in addition to McColl's convenience store which also accommodates a post office. A One Stop convenience store is located along Princess Parade. The centre contains a good range of local amenities including a butcher, NatWest Bank, dry cleaners, three estate agents, two barber shops and three hairdressers. A BP petrol filling station is found in the centre of Locksbottom which also contains an M&S Simply Food store. Unusually, there is no pharmacy in the centre and this represents a key gap in its retail offer.

9.45 In terms of leisure uses, three restaurants are found towards the southern end of the centre, including Cyprianis Mediterranean restaurant which occupies a visually prominent corner plot between Elm Walk and Crofton Road. In addition, Chapter One, a modern European restaurant occupies a standalone building which is located on the southern side of Farnborough Common (A21). Although the restaurant is isolated from the rest of the local centre, it makes a positive contribution in what is considered to be a key gateway location into Locksbottom.

9.46 The centre also contains three cafes, including Walnuts Café which provides an upmarket offering. Locksbottom also contains three pubs; The British Queen and the Ye Olde Whyte Lyon are located towards the southern end of the centre, both are historic in nature and make a positive contribution to the generally upmarket setting of the local centre. The Black Horse pub is located at the opposite end of Crofton Road, adjacent to the Lidl supermarket and is temporarily closed due to ongoing renovations.

[50] No Experian Goad Category Report is available for Locksbottom, therefore our assessment of diversity of uses is based on qualitative observations and review of Experian Goad land use mapping data.

Vacant street level property

9.47 An Experian Goad survey of the centre was undertaken in February 2024 which identified three vacant units. Upon visiting the local centre in April 2024, 334 Crofton Road was the only vacant unit that was identified which was formerly a card & gift shop. 353 Crofton Road was formerly vacant at the time of the Experian Goad survey and is now occupied by Kids Play Village, in addition 371 Crofton Road which is now occupied by Bobo's dessert shop. The vacancy rate of the centre is therefore very low, which is a positive reflection on the overall vitality of the centre.

Pedestrian flows

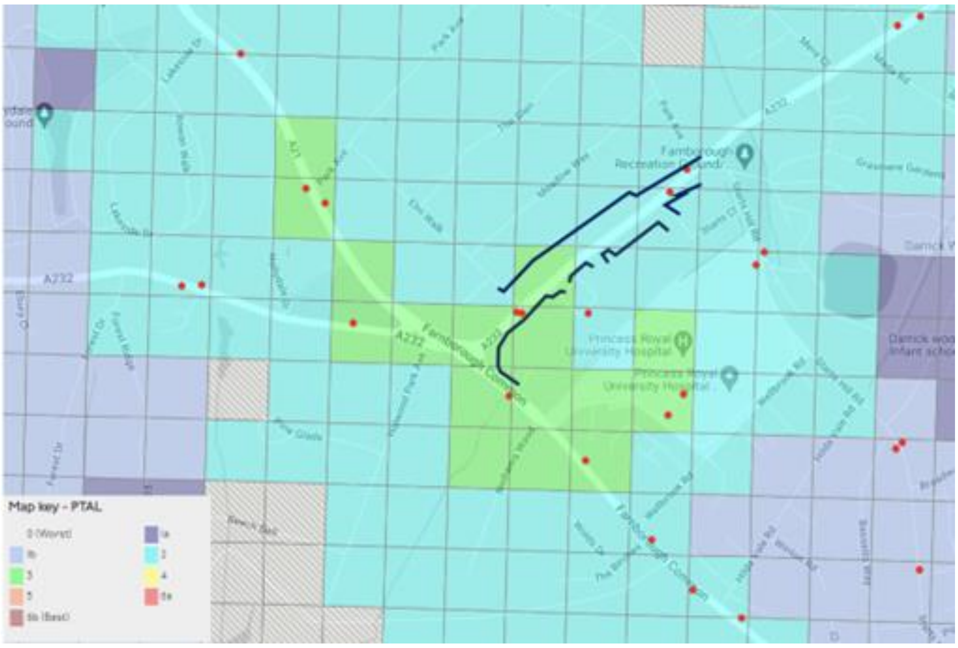
9.48 The centre benefits from two well-located foodstores — Lidl on the northern side of Crofton Road and the large Sainsbury's set behind the southern frontages. The centre was observed to be generally busy and well supported at the time of our visit, although the Sainsbury's appear to cater for car-borne trips to a large extent (as evidenced by the huge car park which wraps around the store), although pedestrian connections with the wider centre are reasonable.

Accessibility

9.49 In terms of public transport, Locksbottom does not benefit from the provision of a railway station, the nearest station is found in Orpington which is located approximately 2.5km to the north west. As shown in **Figure 9.12**, along primary frontages, the local centre has a PTAL rating of between 3 (moderate) and 2 (poor), indicating a more limited range of public transport options, although several bus routes do run through the centre and in particular we note the centre is well served with connections to the nearby higher-order Bromley and Orpington town centres. Several of the bus routes which serve the centre also serve the adjacent Princess Royal Hospital, helping to strengthen linkages between the two locations. The following routes serve the centre, with those also serving the hospital also identified.

- Route 261 runs between the Princess Royal Hospital and Lewisham via Bromley, Orpington and Chislehurst and runs every 15 minutes;
- Route 353 runs from Orpington Ramsden Estate to Forestdale in Croydon, via Hayes, Coney Hall and Addington and runs every 20 minutes;
- Route 336 starts/terminates at Locksbottom Sainsbury's and runs to Catford via Bromley and Bickley every 20 minutes
- Route R2 runs to Biggin Hill every 30 minutes;
- Route R3 runs to Orpington via Petts Wood and St Mary Cray and runs every 20 minutes, starting/terminating at Princess Royal Hospital;
- Route R4 runs to St Mary's Cray / St Paul's Cray and runs every 20, starting/terminating at Princess Royal Hospital).

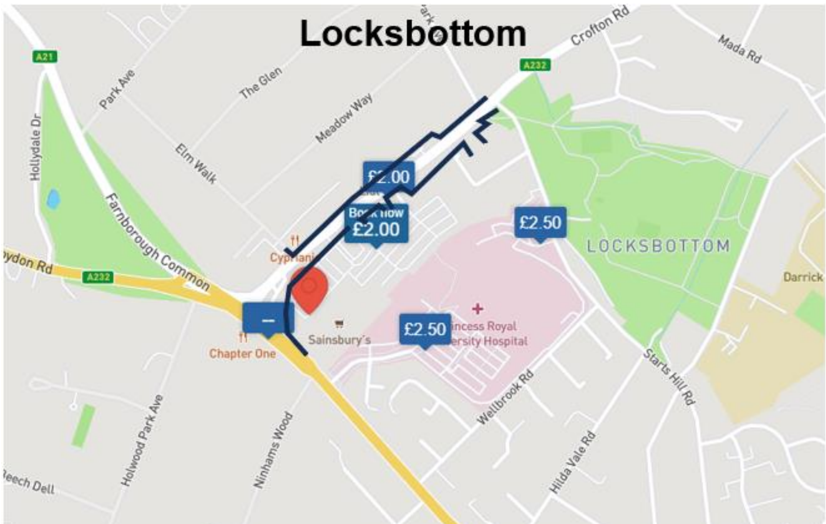
Figure 9.12 PTAL map for Locksbottom local centre (annotated to show defined local shopping frontages)



Base map source: Transport for London. Note – bus stops denoted by red dots

9.50 Locksbottom is a generally accessible centre by car. The Sainsbury's store is supported by an extensive surface car park which is likely to act as the main car park for users of the centre. There may be scope for rationalisation of some of the car parking which falls under Sainsbury's' demise, although the extent of occupancy of the car park at different times of the day is not known but was observed to be well used at the time of our visit. The Sainsbury's supermarket costs £2.00 for a two hour stay; upon visits to the centre, the car park was nearly fully occupied, indicating that it is used for linked trips to other outlets within Locksbottom. There is an area of private/permit car parking to the rear of the Sainsbury's car park; it is not known if this is for workers at the adjacent hospital, for which there are connections through the car park to.

Figure 9.13 Carparking provision around Locksbottom local centre



Base map source: Parkopedia website, accessed April 2024. Annotated to show policy boundary of Locksbottom local centre

9.51 Elsewhere in the centre, the Lidl supermarket also has car park which is free for customers and there are further spaces along the north side of Crofton Road, and there is also a car park at the front of Princess Parade. Both of the aforementioned parking areas cost £1.00 per hour, at a maximum of a three hour stay. There is also parking at the adjacent hospital, although we would not anticipate this to be used by users of the local centre given the ample provision available within the centre itself.

Perception of Safety and Occurrence of Crime

9.52 In reference to data published by London Metropolitan Police and as shown in **Table 9.9**, a total of 62 offences were recorded between November 2023 and April 2024, over a third of which were attributed to shoplifting.

Table 9.9 Crime statistics for Locksbottom, November 2023 – April 2024

Locksbottom	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	TOTAL
Antisocial Behaviour	0	0	0	1	2	2	**5**
Burglary	0	0	0	0	0	1	**1**
Criminal Damage and Arson	0	0	1	1	1	0	**3**
Drugs	0	0	0	0	0	1	**1**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	0	0	2	0	0	1	**3**
Shoplifting	3	0	1	5	9	3	**21**
Theft	0	0	0	2	0	1	**3**
Vehicle Crime	1	0	0	0	1	1	**3**
Violence and Sexual Offences	2	5	4	1	5	3	**20**
other crime	0	0	0	0	1	1	**2**
Total	**6**	**5**	**8**	**10**	**19**	**14**	**62**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

9.53 The environmental quality of the centre is generally reasonable, although it does feel somewhat car dominated by virtue of the multiple car parks across the centre and the large car park serving the Sainsbury's store. The presence of a petrol station centrally within the local centre also serves to undermine its overall environmental quality somewhat. There are two pedestrian crossing points at either end of the local retail frontage, including one outside Lidl, which aids pedestrian movement although as they are fairly well spaced apart the scope to introduce an additional crossing may wish to be explored.

Figure 9.14 Heritage assets in Locksbottom local centre

Source: Historic England base map with Firstplan annotations

9.54 The centre feels generally well maintained and the uniformity of frontage along the northern side of Crofton Road aids in enhancing the overall visual appearance. But overall, the environment quality can be considered adequate, albeit probably with limited scope for enhancement.

Conclusion

9.55 The centre appears to benefit from good levels of vitality and viability, aided by the presence of the Sainsbury's and Lidl stores, the latter of which in particular is well placed to support linked trips to other uses in the centre. The vacancy rate is low, and the diversity of uses is generally reasonable. The environmental quality of the centre is arguably less strong than many of the others in the Borough but is nevertheless adequate.

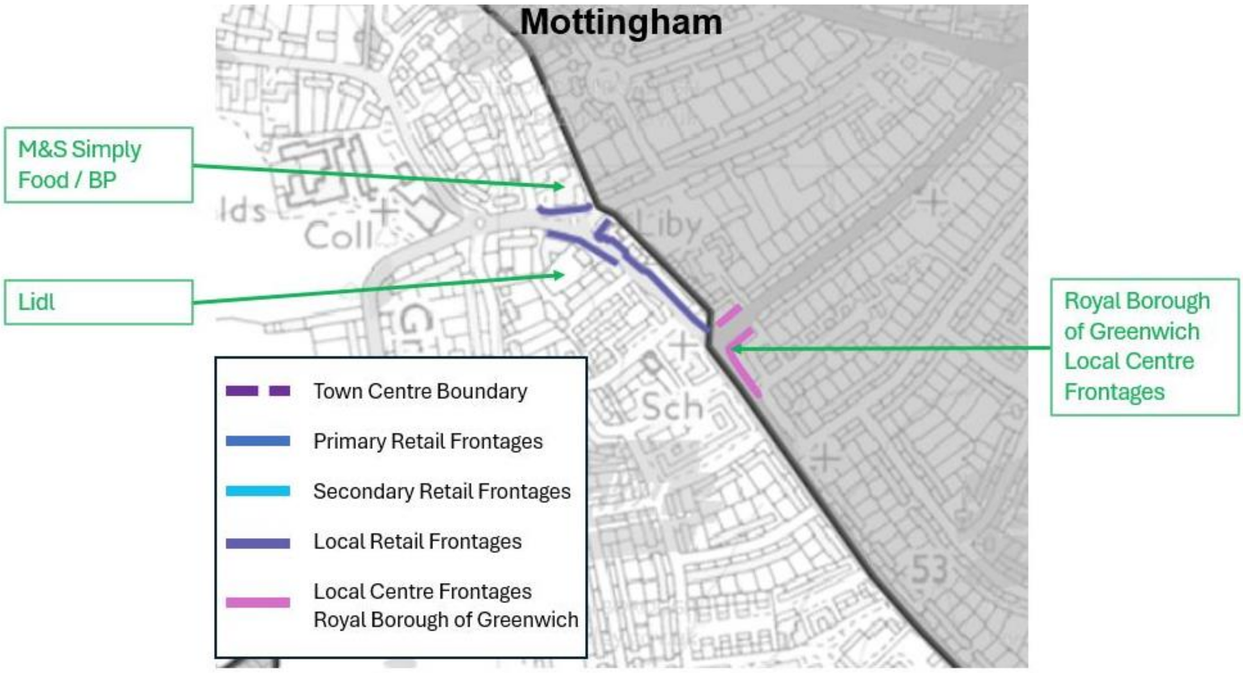
Table 9.10 Summary of strengths and weaknesses of Locksbottom local centre

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

9.56 Mottingham is defined as a local centre within the Bromley Local Plan (2019) however, the southern part of Mottingham Road and Court Road falls under Royal Borough of Greenwich. This report covers the local centre as a whole including the area that falls under the neighbouring borough. Mottingham local centre has a few national chains which include Lidl, BP fuel station with M&S food outlet and Nisa Local. The centre is well served by independent retailers such as cafes, restaurants, takeaways, hair and beauty salons, a post office and newsagents. The Lidl store is a relatively recent addition to the centre, having commenced trading in April 2023 on the site of the former Porcupine public house.

Figure 9.15 Retail frontages in Mottingham local centre, annotated with key developments / premises



Source: LBB Local Plan base map with Firstplan annotations

Diversity of Uses and Retailer Representation

9.57 An Experian Goad survey of the local centre was undertaken in April 2024. Firstplan undertook a site visit to Mottingham local centre in August 2024 to verify the Goad survey and any subsequent changes to retail and wider offer. The Experian Goad survey identified that there are 42 units in total with retail (comparison and convenience) comprising 13 of these, totalling 30.9% of the total units. Regarding 13 retail units, 6 are in use of convenience goods retailers, standing approximately 46.2% and 7 are in use as comparison goods retailers, standing approximately 53.8%. Service sector occupies 25 units, standing approximately 59.5% of 42 units. Mottingham local centre is anchored by Lidl and M&S food outlet (within a BP petrol filling station) which are located to the northern side of the centre. The centre has small independent cafes and takeaways, a fish and chip shop, restaurants, health and beauty salons and newsagents. Other uses in the centre include a tyre shop, funeral care and estate agents. The centre also includes a small library.

9.58 Uses which fall in the RB Greenwich include the Bat & Ball Micropub, a pet shop, funeral care shop, the aforementioned Nisa Local store, a hair salon and an estate agents.

Balance Between Multiple and Independent Stores

9.59 Two units out of 42 are occupied by national retailers - Lidl and M&S Food. The remaining offer comprises independent operators.

Vacant Street Level Property

9.60 The Experian Goad survey of the centre identified three vacant units (16-20, 37 and 43 Mottingham Road) which remains the same. During the visit in August 2024, it was observed that one further unit (57 Mottingham Road) was under renovation.

Pedestrian Flows

9.61 Mottingham Road was fairly quiet at the time of our visit, however the Lidl store was observed to be busy (with its car park full). The M&S store also attracts high levels of usage by virtue of also being used as a petrol station. The busy levels of footfall observed around the Lidl confirm that it acts as the 'anchor' of the offer in the centre (indeed, prior to its opening it could be argued that Mottingham lacked a clear anchor to its overall offer). It is possible that the opening of the Lidl at the very northern end of the centre may skew pedestrian flows more towards this part of the centre than was the case before its opening.

New Lidl store at northern end of Mottingham local centre, which opened in April 2023

Accessibility

9.62 Mottingham can be considered to benefit from moderate levels of accessibility through public transport, as shown in **Figure 9.14.** The majority of the defined local centre has a PTAL rating of 3, representing reasonable access to public transportation services. The centre is served by the national rail network although the station is approximately 700m walk from the centre via a pleasant walk along Court Road, and the station is served by a separate small shopping parade, and on this basis it is unlikely many people would access the centre by this means. The distance from the station to the centre is likely to be a contributor to the fact the centre only has a PTAL score of 3. Mottingham station benefits from direct rail services to central London via Lewisham, and with Gravesend via Sidcup, Bexley and Dartford. The centre is also served by three bus routes:

- Route 124 connects Mottingham with Eltham to the east via Middle Park and with Catford to the west via Chinbrook, and Hither Green which operates every 10 minutes during the weekdays.

- Route 126 connects Mottingham with Eltham High Street to the north and with Bromley to the south via Grove Park and Plaistow which operates every 10 minutes during the weekdays.
- Route 161 connects Mottingham with North Greenwich to the north via Eltham, Woolwich and New Charlton and to the south with Chislehurst which operates every 10 minutes.

9.63 Mottingham has only one car park mainly serving the train station which has 117 spaces and is operated by a private company. Car parking is available in the centre in the Lidl store and on-street, the latter of which is free for 30 minutes and was observed to be approximately 60% occupied at the time of our visit. Footpaths are fairly wide in front of the shops making it easier for people to manoeuvre especially with pushchairs and trollies.

Figure 9.16 PTAL map for Mottingham local centre (annotated to show LBB-defined local shopping frontages)

Base map source: Transport for London. Note – bus stops denoted by red dots

Perception of Safety and Occurrence of Crime

9.64 In reference to data created by London Metropolitan Police and as shown in **Table 9.11**, between November 2023 and April 2024 shows that a total of 37 offences were recorded within Mottingham local centre along Mottingham Road and Court Road. The most common crime recorded was shoplifting (12), vehicle crime (9), theft (5), burglary (3), violence and sexual offences (3), public order (2), other crime (2) and anti-social behaviour (1). The centre felt safe upon visit in August 2024, there was no visuals of damage to the property or graffiti. The identified levels of crime set out in the table below are not considered to give particular cause for concern or impact on the overall vitality of the centre.

Table 9.11 Crime statistics for Mottingham local centre, November 2023 – April 2024

Mottingham	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	TOTAL
Antisocial Behaviour	0	0	1	0	0	0	**1**
Burglary	0	0	1	0	1	1	**3**
Criminal Damage and Arson	0	0	0	0	0	0	**0**
Drugs	0	0	0	0	0	0	**0**
Possession of Weapon	0	0	0	0	0	0	**0**
Public Order	1	0	0	0	0	1	**2**

Shoplifting	2	3	1	3	3	0	**12**
Theft	2	1	1	0	0	1	**5**
Vehicle Crime	1	2	3	1	1	1	**9**
Violence and Sexual Offences	1	1	0	0	0	1	**3**
other crime	0	0	2	0	0	0	**2**
Total	**7**	**7**	**9**	**4**	**5**	**5**	**37**

*Source: Metropolitan Police (*crime data is approximate on the basis of available mapping data)*

Town Centre Environmental Quality

9.65 During our site visit in August 2024, it was observed that Mottingham local centre lacked greenery and plantation other than a few trees next to the library, M&S and the large vacant unit on Mottingham Road. Footpaths were clean and largely rubbish free and there was no visuals of damage or graffiti. There are no traffic lights operated crossings along Mottingham Road however, due to the low level of congestion it seems safe to cross. There are no listed buildings in the centre, with the exception of the Grade II listed Mottingham War Memorial at the junction of Mottingham Road and West Park, close to the new Lidl.

9.66 In terms of the RB Greenwich element of the centre, in terms of footpaths, there is more generous provision of space in front of shops and additional planting e.g. through the presence of a number of trees, when compared with the LB Bromley side. This is likely to be a consequence of the LB Bromley part of the centre being situated on the main road with more limited space in front of the commercial outlets. Overall though, we consider there to be a reasonable level of coherence across the centre and no particular evidence of a 'divide' or different levels of investment or maintenance.

Conclusion

9.67 The centre appears to benefit from good levels of vitality and viability, and the recent opening of the Lidl store has given the centre a defined anchor and can be expected to have attracted more spend to the centre. The remaining retail offer is considered generally adequate and allows for a range of day to day needs to be met. There is a low vacancy rate and the centre is reasonably attractive in its northern part, although feels more functional towards its southern end. Overall, we do not have any particular concerns over its vitality and viability.

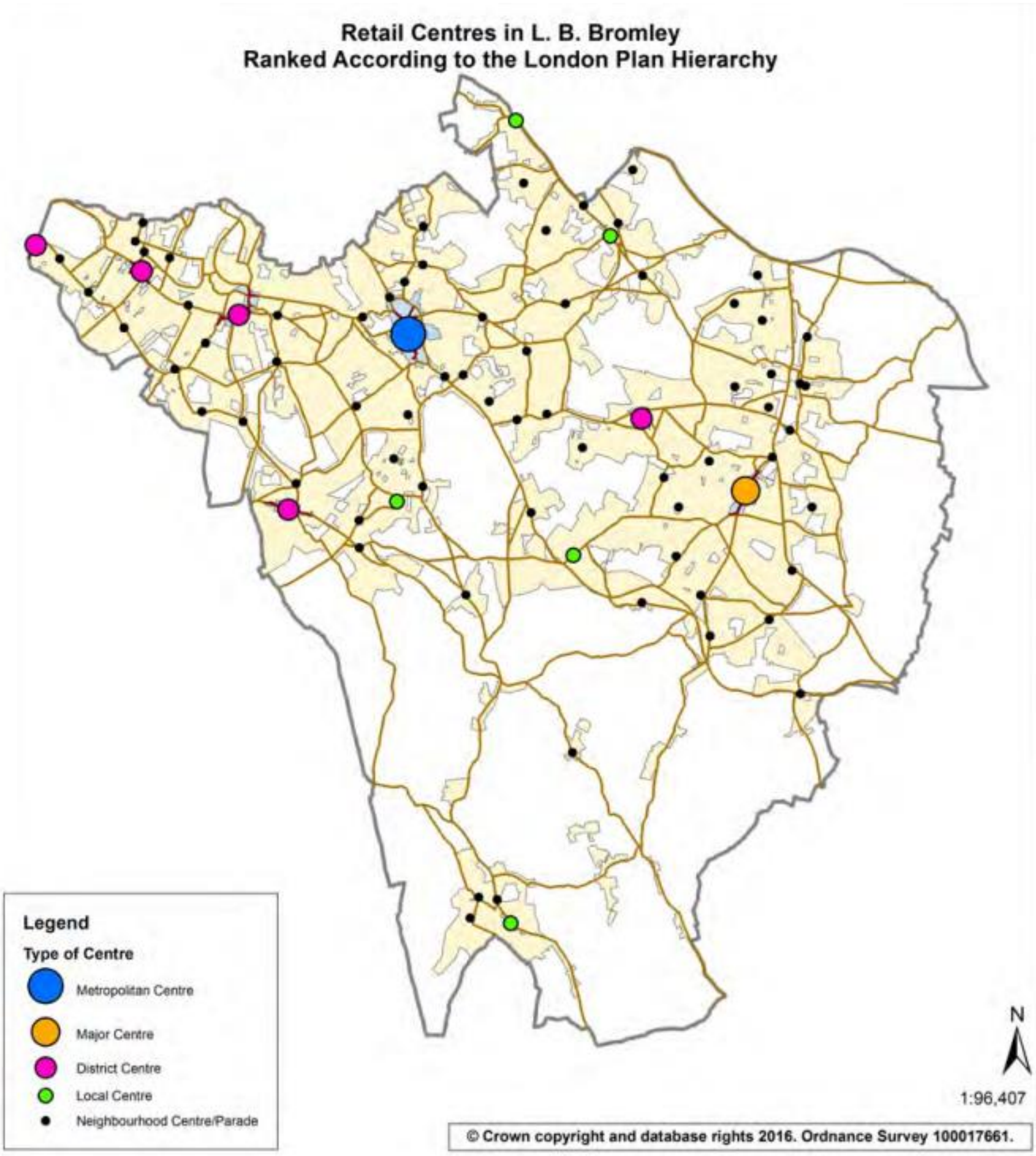
Table 9.12 Summary of strengths and weaknesses of Mottingham local centre

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

SECTION 10 | NEIGHBOURHOOD CENTRES ASSESSMENT

10.1 This section of the study will 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[51]. 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. The location of the neighbourhood centres in the context of the wider retail hierarchy of the Borough is illustrated below in **Figure 10.1.**

Figure 10.1 Location of neighbourhood centres within LBB



Map source: LBB Local Plan

[51] Appendix 10 of the Local Plan does not differentiate between neighbourhood centres and parades.

Approach to assessment of neighbourhood centres & parades

10.2 Given the small size of the neighbourhood centres which in some cases comprise just one unit we have undertaken a desk based analysis rather than full health check assessments against PPG criteria. This exercise updates the previous LBB monitoring of diversity of uses data which was last undertaken in 2016. It was undertaken by way of desktop updates to each of the centres using a combination of Google Streetview and desktop research over the February 2024 to August 2024. Based on this, a new schedule of retail and main town centre uses for each centre was compiled, and a use class assigned to each unit. The full schedule of units for each centre is set out in **Appendix 8 of Volume 2** to this report[52]**.**

10.3 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. In order to gain an understanding of this, following our obtaining the latest schedule of uses in each centre, we distilled this data into a benchmarking exercise, to establish the extent of representation of the following 'key facilities' in each of the 69 centres:

- **Convenience goods**
  - Supermarket
  - Small convenience stores
  - Newsagent/off licence
  - Other convenience outlets (e.g. bakery, greengrocer, international foods)
- **Comparison Goods**
  - Post office
  - Pharmacy
- **Retail & leisure services**
  - ATM
  - Laundrette/dry cleaners
  - Public house
  - Café
  - Take-away
  - Hairdressers/beauty salon
- **GP surgery**
- **Dentist**

10.4 A 'scoring matrix' of which facilities were identified as being present in each of the 69 neighbourhood centres is set out at **Appendix 9 (Volume 2).** This schedule provides each centre/parade with a score out of 14, representing each of the categories listed above. In other words, centres with a high score have a good range of key facilities and thus are responding well to local residents' needs, whereas centres with a lower score have a poorer offer, and potentially result in residents not being able to meet essential needs in a sustainable manner. The scoring matrix at **Appendix 9 (Volume 2)** contains a wealth of further information about each centre, including its PTAL rating, number of bus routes serving the centre, the presence of residential uses within the centre, the extent of national retailer representation within the centre, and an estimation of the vacancy rate based on the latest Google Streetview data.

[52] It should be noted that the accuracy of the updated diversity of uses data will vary between centre, depending on how recent the latest Google Streetview imagery for the centre is.

Overall findings

10.5 Based on this analysis, the following neighbourhood centres were identified as having the highest number of the above-listed ‘key facilities’. No neighbourhood centre in the Borough scores 14/14; the highest score achieved was 12, with a number of centres achieving 11/14. Nevertheless, as each of the centres listed in Table 10 achieves a score of over 75% in terms of its total number key facilities, it can be considered that these centres are performing a strong role in meeting many residents’ key day to day needs.

Table 10.1 Neighbourhood centres with highest number of key facilities

Centre name	Score /14	Summary of centre
High Street, Green Street	12/14	Linear parade of shops located south of Orpington town centre. The main anchor store is a Waitrose supermarket, which is an unusually large/prominent anchor for a neighbourhood centre.
Anerley Hill / Anerley Road	11/14	Linear local centre stretching southwards along Anerley Hill from Crystal Palace Station. Main anchor is a Tesco Express close to Crystal Palace station.
Burnt Ash Lane	11/14	Small neighbourhood parade in a linear line north of Bromley Town Centre, including a Lidl supermarket (former Waitrose).
Chatterton Road, Bromley	11/14	Small linear parade of shops south east of Bromley town centre, anchored by a Co-Op.
Cotmandene Crescent, St Pauls Cray	11/14	Parade of shops east of Chislehurst local centre, including a Co-Op store.
Crescent Way, Green St Green	11/14	Shopping parade off Sevenoaks Road, south of Orpington town centre. Anchored by a Co-Op.
Croydon Road, Elmers End	11/14	Large parade of shops split between Upper Elmers End Rd, Croydon Rd and Eden Park Avenue, including a Spar supermarket.
Kimmeridge Cross, Mottingham	11/14	A large shopping parade, at junction of Beaconsfield Road and Kimmeridge Road South of Mottingham local centre. Includes Co-Op, Costcutter and Londis stores.
Southborough Lane, Bickley	11/14	Parade of shops at the junction of The Farway and Southborough Lane west of Petts Wood district centre.
Windsor Drive, Chelsfield	11/14	Small parade of shops located south of Orpington town centre.

Source: Firstplan research. See Appendix 9 (Volume 2).

10.6 The analysis at Appendix 9 also shows that a number of neighbourhood centres / parades across the Borough score poorly in terms of access to key facilities, achieving scores of only 1 or 2 out of 14. On paper, this evidently represents cause for concern as it shows that local needs are not being effectively met.

10.7 However, it is acknowledged that there may be some instances where even if facilities are not available within a neighbourhood centre/parade, there may be facilities where services are present elsewhere nearby. This is because in some parts of the Borough, there are neighbourhood centres / parades located in close proximity to other neighbourhood centres, or indeed closer to higher-order local or district centres. In these instances, it is not necessarily such a concern if a key facility is not being met in the centre / parade itself.

10.8 Accordingly, we have undertaken further analysis where each neighbourhood centre is additionally categorised through having regard to the presence of other facilities in the immediate surrounding area, each neighbourhood centre is categorised into one of eight categories, as listed below. Further analysis of each category is discussed in turn below. We have removed centres with under five units from the analysis, as centres which are this small will, by nature of their limited offer, invariably be only able to meet a limited range of local needs and will necessitate many residents to use alternative locations nearby.

Categories	Definition
Category 1	Where 50% or more facilities are available and there is a town, district or a local centre within 500m.
Category 2	Where 50% or more facilities are available and there is a town, district or a local centre within 1km.
Category 3	Where 50% or more facilities are available and there is **NO** town, district or a local centre within 1km.
Category 4	Where less than 50% facilities are available and there is a town, district or a local centre within 500m.
Category 5	Where less than 50% facilities are available and there is a town, district or a local centre within 1km.
Category 6	Where less than 50% facilities are available and there is NO town, district or a local centre within 1km.
Category 7	Where less than with 20% facilities are available and there is a town, district or local centre within 1K
Category 8	Where less than 20% facilities are available and there is NO town, district or local centre within 1Km.
Centres with less than 5 units	Neighbourhood centres with less than five units.

Findings by category

Category 1 neighbourhood centres

10.9 A total of seven neighbourhood centres fall within category 1, meaning that they contain over 50% of the facilities and also are located within 500m of a higher order centre. This therefore means they can generally be considered the most well provided for in terms of local residents' access to facilities. Of these seven centres, three contain national retailers, including **'Green Lane, Chislehurst'** which contains both a Co-op and a Premier convenience store. Of note, **'Anerley Hill / Anerley Road'** contains 11 out of 14 facilities which includes a Tesco Express, although it must be taken into account that this neighbourhood centre is one of largest within LBB, containing a total of 66 units. None of the Category 1 centres contain a GP surgery. Additionally, only two centres contain a dentist. **'London Road'** neighbourhood centre is the smallest centre in this category with 11 units in total and no national retailers present. However, the centre is located in close proximity to the Bromley town centre.

Category 2 neighbourhood centres

10.10 LBB contains a total of five Category 2 neighbourhood centres which contain over 50% of facilities and are also located within 1km of a higher order centre. This means that although there are limited facilities available within an immediate walk-in catchment, there are more numerous facilities located nearby, for those residents who wish to / are able to walk further. The Category 2 neighbourhood centres are located within 1km range of Bromley town centre, Penge and West Wickham district centres and Mottingham local centre. Whilst these centres can be considered to provide a reasonable range of local services, that fact that they are within 1km of a higher order centre, local residents have good accessibility to comparison goods outlets. Three out of five centres in this category contain both a Londis convenience store and Co-Op convenience store, meaning that these centres are well served in terms meeting day to day shopping needs. Despite these centres having a good range of local services, only two centres contain a dentist, and one centre contains a pharmacy however, none of the centres contain a GP surgery. This is not considered a cause for concern given the good accessibility to higher order centres which such facilities are generally provided.

Category 3 neighbourhood centres

10.11 This category contains the highest number of neighbourhood centres in the LBB. A total of 21 neighbourhood centres falls within category 3, meaning that they contain over 50% of facilities, but an order centre found is not situated within 1km. Neighbourhood centres in this category range in size with '**Croydon Road, Elmers End'** the largest at 66 units whilst **'Old Hill, Chislehurst'** and **'Crofton Lane, Orpington'** both comprise of 10 units. The Category 3 neighbourhood centres are not concentrated within a particular area of LBB and are interspersed throughout the Borough. 16 out of 21 neighbourhood centres contain a national convenience store retailer with four centres containing more than one. The remaining centres which do not accommodate a nationally operated convenience store either contain a newsagents or off license, meaning some day to day shopping needs can be met. Only three of the neighbourhood centres contain a GP surgery whilst eight centres contain a dentist.

10.12 Despite being neighbourhood centres, two of these category 3 centres contains larger-format foodstores – Lidl in **Burnt Ash Lane** and Waitrose in **High Street, Green Street**. The presence of these larger supermarkets and their associated wider product range enables a greater range of shopping needs to be met and indeed these centres are likely to have a wider catchment than most of the neighbourhood centres in the Borough. The two centres also have a relatively wide number of supporting units – particularly High Street, Green Street which has 36 units, whilst Burnt Ash Lane has 29. Indeed, the number of units in these centres is only slightly fewer than those in a number of local centres (for example, Locksbottom has 42 units; Mottingham has 44 and Biggin Hill has 47.

Category 4 neighbourhood centres

10.13 A total of nine centres are identified as Category 4 neighbourhood centres, meaning that they contain under 50% of the key facilities but are located within 500m of a higher order centre. Four of these neighbourhood are located in proximity to Penge district centre with the remaining not concentrated near a particular centre. Only three of the centres in this category contain a nationally operated convenience retailer. None of the centres in this category contain a post office, pharmacy nor a GP surgery and only two centres that contain a dentist. Five out of nine centres are small, containing less than 10 units in total, including '**Newlands Park'** which only contain six units and has a total of five key facilities out of 14. None of the Category 4 centres contain a supermarket which is to be expected given their small size.

Category 5 neighbourhood centres

10.14 There are a total of seven neighbourhood centres in Category 5, meaning they contain under 50% of facilities and are also located within 1km of a higher order centre. This indicates that while there are not many amenities in the immediate catchments, there are facilities available within 1km radius for residents who are able or wish to travel further. These centres are dispersed around within the borough and are located near higher order centres such as Beckenham, Bromley, Biggin Hill and Chislehurst. '**Beckenham Road, Beckenham'** neighbourhood centre is located west of Beckenham district centre and south-east of Penge district centre. This neighbourhood centre contains a total of 43 units, making it the largest centre in this category. Despite the large number of units, it accounts for just seven out of 14 facilities with no supermarket, post office, pharmacy, GP Surgery or a dentist and only contains one newsagents/off licence. Therefore, whilst the centre is relatively extensive in terms of its range of units, much of the offer does not respond particularly well towards meeting localised day to day needs. However, a Sainsbury's Local (185-205 Beckenham Road) is located to the west of the centre, on the corner of Sydney Road and Beckenham Road, and there may be scope for the boundary of the neighbourhood centre to be extended to include this. Whilst slightly detached from the rest of the retail offer in the centre, it within clear sightline and short walking distance from the western end of the centre as currently defined.

10.15 '**White Horse Hill, Chislehurst'** contains 11 units whilst '**Roundway, Biggin Hill'** and '**Chilham Way, Hayes'** both contain only seven units and are the smallest in terms of the number of units within in this category. In spite of their relative small size, each contain a nationally operated small convenience store (Morrisons Daily, Co-Op and Budgens). Overall, centres in this category all contain either a newsagents or a nationally operated small convenience store which means that they can met day to day shopping needs of local residents are, however, they generally lack the provision of post offices, pharmacies, GP surgeries and dentists.

Category 6 neighbourhood centres

10.16 The LBB's joint second-highest number of neighbourhood centres are found in this category. A total of nine neighbourhood centres are classified as category 6, which means that they have fewer than 50% of the key facilities and a higher-order centre is not located within a 1km radius, indicating a relative paucity of provision in these areas. None of the neighbourhood centres which fall within category 6 account for more than 10 units and on average comprise just seven units. These centres generally have a low rate of vacancy, notwithstanding **'Grovelands Road, St Pauls Cray'** which contains three vacant units out of a total of seven. The remaining units are in use as a newsagents, take away and beauty salon. Whilst the offer in this neighbourhood centre is limited, a Tesco Superstore is situated approximately 1km to the north-east. The large supermarket provides a range of fresh food counters, a pharmacy and café, thus is able to many of the day-to-day needs of surrounding LBB residents. Following the trend of other neighbourhood centres which lack a large number of units, Category 6 neighbourhood centres lack the provision of a supermarket, pharmacy, GP surgery or a dentist.

Category 7 neighbourhood centres

10.17 Category 7 are centres that have less than 20% of key facilities available but a higher order centre is located within 1km, however none of the neighbourhood centres or local shopping parades fall within this category.

Category 8 neighbourhood centres

10.18 Category 8 neighbourhood centres are those that have less than 20% of facilities and a higher order centre is not located within an 1km radius. There are a total of seven neighbourhood centres in this category. These neighbourhood centres are not concentrated in a certain area of the Borough. The Category 8 neighbourhood centres are discussed in greater detail below.

<u>Edgehill Road, Chislehurst</u>

10.19 This neighbourhood centre is located approximately 1.3km to the north of Chislehurst local centre and consists of 11 units in total. The centre contains a newsagents, takeaway and a tattoo studio, whilst three units are occupied by trade/hardware outlets. Not only is '**Edgehill Road, Chislehurst'** relatively small, standing at 11 units, a total of five units were identified as vacant at the time this assessment was carried out. Whilst the high rate of vacancy further exacerbates the lack of offer for surrounding residents, it presents an opportunity to provide some of the identified 14 key facilities including a national convenience retailer, pharmacy or café, as market interest dictates.

<u>High Street, Downe Village</u>

10.20 '**High Street, Downe Village**' is located approximately 5km to the north-east of Biggin Hill local centre. This centre contains six units which are all occupied at the time this assessment was carried out. Key facilities include two drinking establishments and a takeaway restaurant. The centre is located in a relatively isolated rural area and a supermarket is not within walking distance. Taking this into account, it is considered that the neighbourhood centre would benefit from the provision of a convenience store.

Kelvin Parade, Orpington

10.21 This neighbourhood centre is located within a suburban area, approximately 1.4km north-east of Orpington town centre. The centre consists of seven units which are all occupied. In terms of key facilities, the centre contains two laundrettes/dry cleaners and a takeaway restaurant. This neighbourhood centre could benefit from the provision of a convenience store as the nearest convenience store is located more the 800m away.

Sevenoaks Road, Pratts Bottom

10.22 This neighbourhood centre is located approximately 3.3km to the south of Orpington town centre. The centre consists of six units and the only key facility identified is a takeaway restaurant. The offer for surrounding residents is supplemented by a Morrisons Local convenience store that is contained in a petrol station and a Greggs bakery which are located on the opposite side of Sevenoaks Road. Whilst the overall offer of the centre is limited, the presence of the Morrisons Daily store does enable a reasonable range of day to day needs to be met.

Tillingbourne Green, St Mary Cray

10.23 This centre is located approximately 1.5km to the north of Orpington town centre. The centre consists of 11 units, but only contains two key facilities in the form of a Premier convenience store and a beauty salon. A key issue identified for this neighbourhood centre is the high rate of vacancy, with six units identified as vacant when this assessment was carried out. The Premier store will enable a limited range of day to day convenience shopping needs to be met.

Neighbourhood centres with five units or less

10.24 A total of six neighbourhood centres have been identified which have five units or less. Given the small size of these centres, they have not been categorised. The six neighbourhood centres are discussed in greater detail below.

Fordwich Close, Orpington

10.25 This location is approximately 1.1km to the north of Orpington town centre and 1.2km to the south-east of Petts Wood district centre. This neighbourhood centre contains a total of four units, with key facilities consisting of a newsagents and a take away restaurant. The lack of a convenience store or other key facilities such as a pharmacy is not considered a particular cause for concern given the centre’s proximity to both Orpington and Petts Wood and the good availability of bus services connecting to these areas.

Hazel Walk, Bromley

10.26 This location is situated in a residential area, approximately 1.3km south-west of Petts Wood district centre. The centre contains only one unit which is occupied by One Stop convenience store. Given that the centre only comprises one unit, the provision of a national convenience retailer is likely the most useful type of facility for surrounding residents.

Main Road, Biggin Hill

10.27 This location consists of a small parade of shops (three units) adjacent to London Biggin Hill Airport and is located approximately 2.3km to the north of Biggin Hill local centre. Key facilities include a Londis convenience store and a hairdresser. Whilst this centre is relatively isolated from other centres, it is served by two bus services which provide connections to Biggin Hill to the south-east.

Mountfield Way, St Pauls Cray

10.28 This location is approximately 1.9km to the north of Orpington town centre. This centre consists of five units, key facilities include a Nisa convenience store, newsagents and a beauty salon. The Nugent Shopping Park is located within walking distance to the centre, approximately 200m to the west. The shopping park contains a Marks and Spencer foodstore and a Boots pharmacy meaning that surrounding residents are well served in terms of key facilities.

Kent Road, St Mary Cray

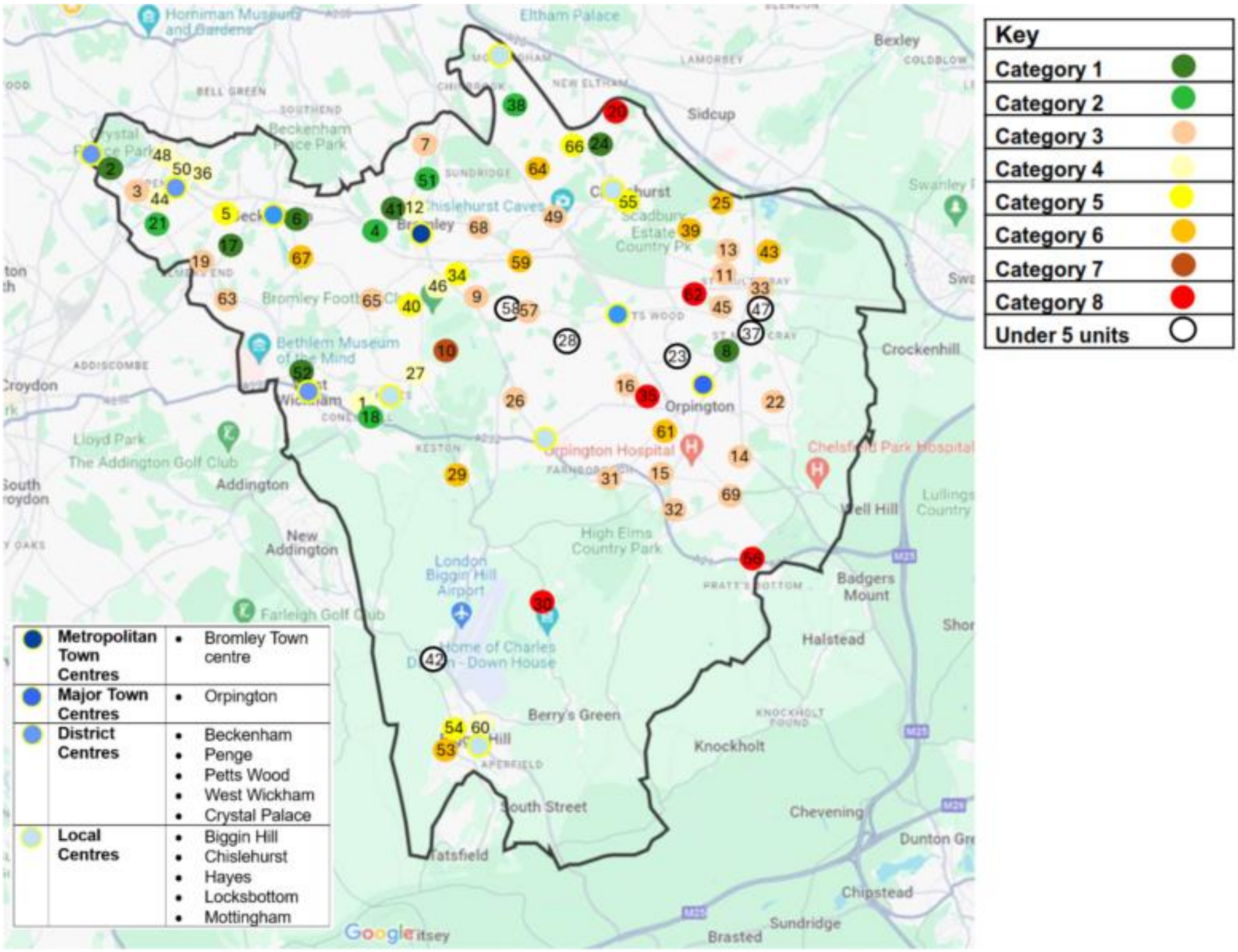
10.29 This location is approximately 800m to the north of Orpington town centre. The centre comprises three units and contains two key facilities in the form of a takeaway restaurant and a hairdressers. Although this centre lacks a convenience store, the proximity to Orpington town centre means that residents in the surrounding area still have good access to key facilities.

Southborough Lane/Salisbury Road, Bromley Common

10.30 This location is located approximately 2km to the east of Petts Wood district centre, within a residential area. This neighbourhood centre contains a total of five units, which are all occupied by key facilities including a Premier convenience store, newsagents, greengrocers, butchers and a takeaway restaurant. Whilst this neighbourhood centre is well served by key facilities and is able to meet the localised needs of surrounding residents in its own right, it is located in proximity to 'Southborough Lane, Bickley' neighbourhood centre which accommodates a total of 11 key facilities. Overall, despite the small size of the centre, it is able to meet the day to day needs of local residents and is supported by a good range of convenience goods outlets and services which are situated in the surrounding area.

10.31 **Figure 10.2** sets out a 'heat map' which shows the location of the neighbourhood centres based on the assigned categories set out above; a larger version is set out as part of our summary assessment at **Appendix 9 (Volume 2).** As well as a detailed version of categories with definition and individual centres in each category is included in **Appendix 11**. Category 1-5 centres generally provide good facilities for residents however, centres in category 6-8 could benefit from additional convenience and leisure facilities. Whilst it is largely for the market to dictate the nature and type of facilities which come forward within centres at all levels of the retail hierarchy, the analysis below does confirm the areas where, in order to provide more sustainable patterns of shopping and access to local facilities, support should be given where possible to increasing the depth and range of local shopping facilities, including, as a priority, access to convenience stores.

Figure 10.2 Heat map of neighbourhood centres within LBB



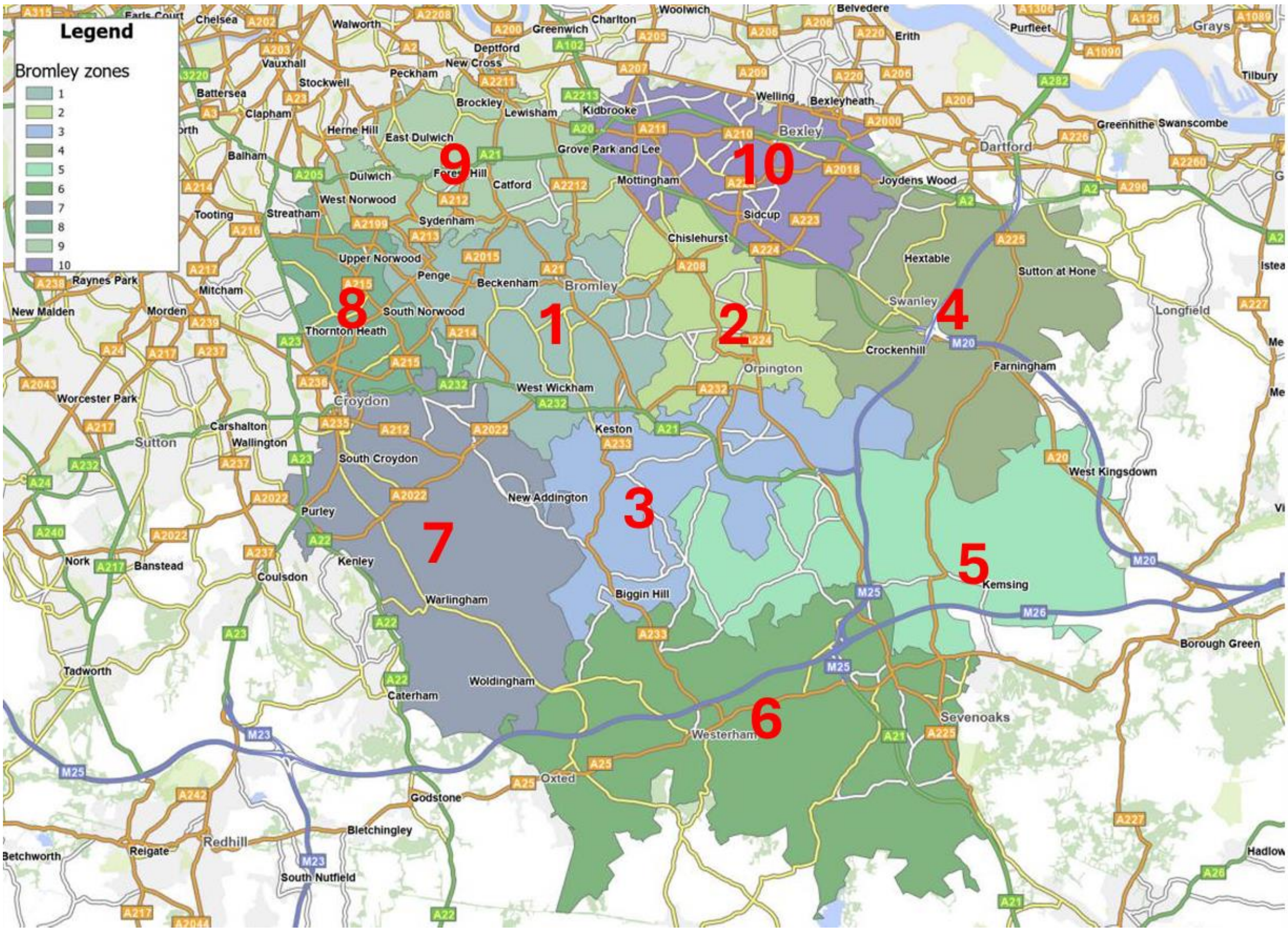
Source: Firstplan analysis

SECTION 11 | APPROACH TO HOUSEHOLD TELEPHONE SURVEY

11.1 In this section, we set out an introduction to the household telephone survey of shopping patterns, which has been undertaken in support of this study. As set out previously in Section 1, the household survey updates that which was undertaken in support of the 2012 Study in full. We have sought to retain the same overall survey area and sub-division into survey zones, which is considered to remain robust and an accurate reflection of the extent of the shopping and leisure catchment of centres in LBB.

11.2 The extent of the household survey area is shown in Figure 11.1[53], with the administrative boundary of LBB denoted by the heavy black line, confirming that the Borough falls within the survey area in its entirety. The survey area extends beyond the boundaries of the Borough to all sides into neighbouring authority areas, extending broadly to Sevenoaks and Westerham to the south; Croydon to the west; Dulwich and Lewisham to the north; Welling, Bexley and Crayford to the north-east, and Kemsing to the south-east. The extension of the survey area into these surrounding locations means the extent to which residents in these surrounding areas look towards centres in LBB for their shopping and leisure needs can be accurately captured.

Figure 11.1 Household survey area



Map source: Experian with Firstplan annotations

[53] A larger version of Figure 11.1 is reproduced as **Appendix 4.**

11.3 As can be seen from **Figure 11.1,** the overall survey area 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 and zone 3 covering the more rural southern side of the Borough.

11.4 Approximately one hundred telephone surveys were undertaken in each of the ten zones (1,000 in total). Respondents were contacted across a variety of days at the week and at different times, and respondents' key demographics (e.g. age bracket and gender) were recorded in order to ensure a robust sample of the local population was captured. All respondents surveyed were asked to confirm they were the principle shopper in the household.

11.5 The subdivision of the survey area into zones is as shown in **Table 11.1** (which also assigns each zone a name having regard to the key town centres located within it) and reflected in the different shaded areas on Figure 11.1. Patterns of shopping do not reflect local authority administrative boundaries and therefore, as noted above, the survey area also extends into neighbouring authority areas. The numbering and extent of the survey zone boundaries has been kept consistent with those in the 2012 Study; the exact boundaries of each of the zones are defined by a combination of postcode sectors, as also listed in **Table 11.1**.

Table 11.1 Household survey zone definitions by name & postcode sector

Zone number	Zone name	Postcode sectors
1	Bromley MTC & Beckenham	BR1 1, BR1 2, BR1 3, BR1 4, BR2 0, BR2 87, BR2 8, BR2 9, BR3 1, BR3 3, BR3 4, BR3 5, BR3 6, BR4 0, BR4 9, SE20 7, SE20 8
2	Orpington & Petts Wood	BR5 1, BR5 2, BR5 3, BR5 4, BR6 0, BR6 8, BR7 5, BR7 6
3	Biggin Hill	BR2 6, BR6 6, BR6 7, BR6 9, TN16 3
4	Swanley	BR8 7, BR8 8, DA2 7, DA4 0, DA4 9
5	Shoreham & Kemsing	TN14 5, TN14 7, TN15 6
6	Sevenoaks	RH8 0, TN13 1, TN13 2, TN13 3, TN14 6, TN16 1, TN16 2
7	Croydon South	CR0 0, CR0 5, CR0 8, CR0 9, CR2 0, CR2 6, CR2 7, CR2 8, CR2 9, CR3 7, CR6 9, CR8 1, CR8 2
8	Croydon North	CR0 2, CR0 6, CR0 7, CR7 7, CR7 8, SE19 1, SE19 2, SE19 3, SE25 4, SE25 5, SE25 6, SE27 0, SW16 3
9	Lewisham	BR1 5, SE12 0, SE12 8, SE12 9, SE13 5, SE13 6, SE13 7, SE15 3, SE21 7, SE21 8, SE22 0, SE22 9, SE23 1, SE23 2, SE23 3, SE26 4, SE26 5, SE26 6, SE27 9, SE4 1, SE4 2, SE6 1, SE6 2, SE6 3, SE6 4, SE9 4
10	Sidcup & Bexley	DA14 4, DA14 5, DA14 6, DA15 7, DA15 8, DA15 9, DA16 2, DA5 1, DA5 2, DA5 3, DA6 7, DA6 8, SE9 1, SE9 2, SE9 3, SE9 5, SE9 6
	Denotes zone wholly or predominantly within LBB	

11.6 In terms of the key centres in LBB:

- Bromley metropolitan town centre, and Beckenham and Penge district centres fall within zone 1.
- West Wickham district centre sits on the boundary of zone 1 and zone 7.
- Orpington major town centre and Petts Wood district centre fall within zone 2.
- Crystal Palace district centre falls within zone 9.

11.7 The household telephone survey results identify the shopping patterns of residents in the survey, for comparison (non-food) goods and convenience (food) goods, as well as patterns of commercial leisure visits. For comparison goods, questions were asked about shopping patterns for the following types of goods:

- Clothing & footwear;
- Furniture, carpets or soft household furnishings;
- DIY or decorating goods;
- Electrical items e.g. televisions, washing machines & computers;
- Health, beauty & chemist items;
- Recreational goods e.g. sports equipment, bicycles, musical instruments & toys;
- Other non-food items, e.g. books, CDs, vinyl, DVDs, Blu-Ray, jewellery, china & glass items.

11.8 A ‘composite’ set of shopping patterns was then produced, weighted by the average distribution of expenditure on each of these goods categories across the survey area, as identified by Experian. It is this ‘composite’ analysis which forms the basis of the analysis in this section and have in turn been used to inform the quantitative forecasts of comparison goods need which are set out in the following section of the report.

11.9 For convenience goods, questions were asked on patterns of visits for ‘main’ food shopping (i.e. weekly/ bulk food shopping trips),’top up’ food shopping (basket/small but frequent purchases) and ‘small shops’ (visiting specialist local retailers). Again, a ‘composite’ version of these three sets of results was prepared and used as the basis of the discussion in this section of the report and subsequent quantitative analysis.

11.10 In addition to surveys of patterns of shopping and leisure uses, respondents were asked a series of qualitative questions about their usage of town centres in the Borough, their likes and dislikes, and how it was considered that the offer and profile of the centres could be reprofiled to have regard to changing patterns of shopping and usage of town centres. The findings of these qualitative outputs have been discussed in previous sections of this report.

SECTION 12 | COMPARISON GOODS SHOPPING PATTERNS & IDENTIFICATION OF NEED

12.1 In this section we introduce the key inputs which form the basis of our assessment of the quantitative 'need' for new comparison goods retail floorspace in LBB. We then go on to forecast the quantum of comparison goods floorspace which the Council should seek to plan for over the new Local Plan period. An equivalent assessment for convenience goods floorspace is undertaken in the following section.

12.2 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. We introduce these inputs in full below. The findings of this section should be considered alongside the retail capacity tabulations for comparison goods floorspace at **Appendix 1 (Volume 2).**

12.3 The retail capacity forecasts set out in this section cover the whole of the Council's new Local Plan Update period to 2041. However, it is advised that figures beyond the next ten years are only considered indicative and should be subject to further review and updating during the course of the Plan period. This is because both economic circumstances and retail trends can change rapidly therefore longer-term forecasts of expenditure growth are more difficult to predict.

Calculation of quantitative need

12.4 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 (as previously discussed) 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. It should be noted that the 'need' figures presented at the end of this section and the following section (for convenience goods need) relate to those for LBB only – i.e. they do not include the need for floorspace generated by other centres which fall within the household survey area; as we have previously set out the survey area also extends to include parts of LB Croydon, Lewisham, Bexley and Boroughs of Dartford and Sevenoaks for example.

12.5 The first stage in this exercise is establishing the 'baseline' position, which is developed as follows:

- **Step 1: Calculate the total population (Step 1a) and amount of convenience and comparison goods expenditure (Step 1b) which is available within the postcode sectors comprising the main centres' catchment areas (the 'survey area');**
- **Step 2: Allocate the available expenditure to the convenience and comparison goods shopping destinations visited by residents within these postcode sectors, as defined by the household telephone survey of shopping patterns;**
- **Step 3: Compare the total expenditure attracted to each shopping destination with the current retail floorspace to assess 'sales densities' (i.e. turnover per sq.m) in each shopping destination.**

Calculation of total population (Step 1a)

12.6 For the purposes of our 'baseline' needs assessment, we have utilised population forecasts provided by Experian. These are provided bespoke for each of the 10 survey zones and are past trends-based population forecasts, and it is important to caveat that they are not 'policy forward', so may not fully reflect any planned levels of growth which may result in a level of population growth over and above that which has historically come forward. We have also, as a 'scenario test', run a second set of modelling which utilises GLA population projections modelling, which is discussed separately below.

12.7 Experian's population projections are produced using a 'demographic component model' which is based on a combination of Experian current age and gender estimates, and Government population projections by age/ gender bands at the Local Authority District level. The 'demographic component model' uses Experian 2022 mid-year age and gender estimates as a base, and projects these forward on a year-by-year basis over the desired period (in the case of this study, up to 2041). The Experian model takes into account the following yearly components of population change in their projections, with the resulting rates of population change sense checked against Government/ONS population projections:

- Birth rate (applicable in the 0-4 age band);
- Ageing (population received from preceding age band);
- Ageing (population lost to succeeding age band);
- Net migration (by age band);
- Death rate (by age band)

12.8 Using GIS modelling, Experian are then able to apply these projections to a bespoke geographic area — in this case to mirror the boundaries of the household survey zones which combine to make up the survey area. Experian's population estimates and projections for the survey area are shown in **Table CM1 (Appendix 1)/ Table CV1 (Appendix 2)** and are summarised in **Table 12.1**. This shows that between 2022 (the base year for which Experian population data is available) and 2041 (the end of the Council's new Local Plan period), the population of the survey area is expected to increase by 67,107 persons.

Table 12.1 Experian population forecasts for survey area to 2041

Base/ interval year	2022	2024	2029	2034	2041	Change 2024- 41
Population	1,211,685*	1,230,374	1,249,381	1,268.581	1,297,481	+67,107

Source: Experian Micromarketer, 2024. Note: (*) denotes actual population; all other forecasts are projections / estimates.

Available expenditure in the survey area (Step 1b)

12.9 Experian identify a 'per capita' spend (spend per head) on comparison goods for each of the seven survey zones. These per capita figures are shown in **Table CM2 of Appendix 1**. This shows that per capita spend on comparison goods ranges from £3,195 per person in zone 8 (Croydon North) to £4,995 per person in zone 6 (Sevenoaks) at the base year of the expenditure data (2022). The average per capita comparison spend is £3,884; and the average for the three survey zones which cover the majority of LBB is £3,846. To put this into context, the UK average spend per head on comparison goods (at 2022) was £3,809; the per capita expenditure across the survey area therefore sits fractionally above this.

12.10 Per capita spend does not typically remain static and is influenced by some of the wider economic factors which this study has previously identified. Experian produce guidance in their 'Retail Planner Briefing Note' releases on the extent to which per capita spend on goods categories may change over time; this guidance is typically published by Experian on an annual basis.

12.11 The most recent guidance in this respect is set out in **Experian Retail Planner Briefing Note 21 ('RP21'), published in February 2024**. RP21 forecasts a decrease in per capita (per head) spend on comparison goods for the period 2024-25 of -1.2%, as the wider constraints on growth and cost of living crisis continues to impact on household spending, but for the remainder of the Plan period relatively high levels of annual growth in spending on comparison goods are forecast, peaking at +3.1% per annum between 2026 and 2030 before cooling slightly to 2.8% per annum for the period to 2040[54] . These represent high levels of annual growth in comparison goods spend and are, for example, more optimistic than the +2.5% per annum annual growth for the period 2025-29 forecast by Experian in the preceding Retail Planner Briefing Note 20 (which was published by Experian in February 2023).

12.13 It is necessary to make an adjustment to the Experian per capita spend figures to allow for nonstore methods of shopping, known as 'Special Forms of Trading' (SFT) to be removed from the retail capacity forecasts. This is because the forecasts only seek to provide of the amount of physical 'bricks and mortar' floorspace which the Council needs to plan for, and therefore spending directed towards to other forms of shopping — principally online shopping — needs to be removed.

12.14 This exercise is undertaken in **Table CM3 o**f Appendix 1. The proportion of total spend which has been deducted is derived from the household survey results and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in RP21. The deductions applied are summarised for ease of reference in **Table 12.2.**

Table 12.2 Convenience goods SFT adjustments

	2024 (study base year)	2029 (interval year)	2034 (interval year)	2041 (interval year)
UK average – Experian Retail Planner 21 Feb 2024)	24.3%	27.4%	28.8%	29.7%
Change from previous interval period	-	+3.1%	+1.4%	+0.9%
Survey area average with growth from ERP applied	52.5%	55.6%	57.0%	57.9%

Source: household survey results & Experian Retail Planner Briefing Note 21 (RP21)

12.15 The household survey results indicate that online comparison goods shopping rates in the survey area are very significantly higher than the UK average, accounting for an average of 52.5% of all comparison goods spend in 2024, compared to a current UK average of 24.3%; that is to say, levels of online shopping take-up for comparison goods are on average at least double the UK average identified by Experian in the survey area. By applying Experian's UK average SFT growth rates to this figure of 41.9%, it means that by the end of the study period at 2041, SFT could account for up to 57.9% of total comparison goods spend, i.e. approaching nearly £6 in every £10 spent on comparison goods. This online spend is removed from our quantitative need assessment, which solely focusses on the need for additional physical retail floorspace from LBB. We have applied these 'adjusted' SFT forecasts (see Table 12.2) to our quantitative needs assessment.

[54] Experian currently only project expenditure growth as far as 2040 and therefore we have extrapolated growth rates for the year 2039-40 onwards to 2041.

12.16 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of 'physical retail' spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2041. This exercise is also set out in **Table CM3 of Appendix 1** and shows that total comparison goods spending in the survey area, once SFT is removed, is currently (2024) £1,979.3m; this is expected to increase to £2,365.4m by 2034 (growth of £306.1m from 2024) and, indicatively, to £2,873.4m by 2041 (growth of £894.1m from 2024).

Shopping patterns in the survey area (Step 2)

12.17 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.

12.18 The total comparison goods market share which each comparison goods shopping destination draws from the survey area is shown in the final column of **Table CM5a of Appendix 1**. This shows **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.

12.19 In terms of overall comparison goods market share from the survey area, **Table 12.3** summarises the most popular locations for comparison goods shopping for residents in the survey area, covering locations both within and outside the survey area boundaries in order to build up an overall picture of comparison goods shopping patterns. Centres / destinations within LBB are shown in bold text.

Table 12.3 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

12.20 Table 12.3 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.

12.21 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.

12.22 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.

12.23 A further key significant takeaway from Table 12.3 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[55]. 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.

12.24 The smaller district and local centres in the Borough do not feature prominently in the survey area-wide shopping patterns; this is to be expected as these centres principally serve local shopping catchments rather than being 'destinations' for comparison goods shopping. Nevertheless it is interesting to note from the analysis at Table CM5a (Appendix 1) that the district centres at Beckenham, Penge, West Wickham and Crystal Palace all perform relatively strongly in terms of the comparison goods turnover they attract from more localised catchments, with each centre drawing a comparison goods turnover of between £15 and £20m from the survey area. LBB's other district centre at Petts Wood has a lower comparison goods turnover, drawing £3.1m from the survey area, and this centre is considered to have an offer which leans more firmly towards convenience retail and food & beverage.

12.25 **Table 12.4** shows the most popular comparison goods shopping destinations at the zonal level, showing where residents in different parts of the survey area are travelling for their comparison goods shopping. A darker highlight of a particular centre/destination indicates what we consider to be a 'dominant' market share (a market share of 30%) or more from any individual zone, and a lighter highlight identified what we consider to be a 'secondary' market share (a market share of between 10 and 30%). This analysis is useful for two reasons:

- Firstly, it enables the core comparison goods shopping patterns of residents who live in the zones which comprise LBB — all of zones 1, 2 and 3, and parts of zones 8 and 9 — to be understood, and identification of key competing destinations to be made.

[55] 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.

- Secondly, it enables analysis of the extent to which the comparison goods retail catchments of centres in LBB extend beyond the Borough itself and into neighbouring authority areas.

Table 12.4 Main locations for comparison goods shopping by survey zone

Zone number	Zone name	Most popular comparison goods shopping destination (2024) (%)	2nd-Most popular comparison goods shopping destination (2024) (%)	3rd-Most popular comparison goods shopping destination (2024) (%)
1*	Bromley MTC & Beckenham	Bromley town centre (42.9%)	Bell Green R/W (6.6%)	Orpington R/W (6.4%)
2*	Orpington	Orpington R/W (26.6%)	Bromley town centre (19.5%)	Orpington T/C (18.4%)
3*	Biggin Hill	Bromley town centre (21.0%)	Orpington R/W (16.5%)	Orpington T/C (14.8%)
4	Swanley	Bluewater (32.2%)	Crayford / D'ford (22.3%)	Orpington R/W (13.9%)
5	Shoreham & Kemsing	Sevenoaks T/C (22.4%)	Bluewater (17.1%)	Sevenoaks R/W (14.7%)
6	Sevenoaks	Sevenoaks T/C (35.7%)	Bluewater (13.3%)	Oxted (9.4%)
7	Croydon South	Purley Way R/W (27.6%)	Croydon town centre (18.7%)	Bromley town centre (9.8%)
8*	Croydon North	Purley Way R/W (24.0%)	Croydon town centre (16.5%)	Central London (6.4%)
9*	Lewisham	Charlton R/W (15.8%)	Bell Green R/W (13.8%)	Lewisham T/C (13.6%)
10	Sidcup & Bexley	Bluewater (20.8%)	Crayford/ D'ford (12.4%)	Orpington R/W (8.1%)

**denotes zone which falls wholly or partially within LBB. Note: T/C = Town Centre, R/W = Retail Warehousing. Source: Table CM4, Appendix 1.*

12.26 Table 12.4 shows that:

- In **zone 1,** Bromley town centre is the dominant comparison goods shopping destination, accounting for over 40% of the market share. No other comparison goods shopping destination attracts a significant market share from residents in this zone, as evidenced by the second-highest market share being 6.6%.
- For residents in **zones 2 and 3**, there is no dominant comparison goods shopping destination. Rather, three retail destinations each compete broadly evenly for a 'secondary' market share – Bromley town centre, retail warehousing at Orpington and Orpington town centre. Retail warehousing at Orpington attracts the highest market share in zone 2, and Bromley town centre attracts the highest market share from zone 3, with the benefit of good accessibility to the town centre via the A223.
- In **zone 4**, which covers the Swanley area, the influence of Bluewater becomes more apparent, and Bluewater attracts a dominant market share from this zone. Residents also look towards the town centres and retail warehousing in the Crayford / Dartford areas to a greater extent than they look towards shopping

destinations in LBB. Similar shopping patterns can be observed from **zone 10** (Bexley / Sidcup areas), although the dominance of Bluewater is not as pronounced.

- Residents in **zones 5 and 6** do not look towards destinations in LBB to any significant extent, and in zone 6 Sevenoaks town centre comfortably attracts a dominant market share.
- In the Croydon area, which covers **zones 7 and 8**, residents largely look towards existing facilities in Croydon, which is to be expected given the closer relative proximity and strength of the retail offer along Purley Way, even if Croydon town centre is arguably underperforming at present. Nevertheless, Bromley town centre attracts a 9.8% comparison goods market share from residents in zone 7.
- In the Lewisham area (**zone 9**), again destinations in LBB do not attract significant market share, with shopping patterns relatively evenly split between the retail warehousing at Charlton / Greenwich; Bell Green; and Lewisham town centre. There may be scope for these market shares to change in the future on account of the planned improvements to Lewisham town centre and the proposed redevelopment of the retail park at Bell Green.

Town centre catchments and changes since 2011 Study

Bromley town centre

12.27 From the zonal analysis, it can therefore be seen that Bromley town centre's comparison goods retail catchment is very strong in zone 1, and also performs reasonably strongly from zones 2 and 3 from which it acts as one of three secondary shopping destinations. For the most part therefore, the catchment of Bromley town centre does not extend in any significant extent beyond the boundaries of the Borough, although it does pick up a market share of between 5 and 10% from a further five of the nine survey zones (zones 6-10 inclusive), which can be considered the tertiary catchment of the town centre. We estimate that the combined spending of Bromley town centre from these tertiary zones to be in the region of £101.6m, and therefore in financial terms they clearly make a significant contribution to the overall comparison goods retail turnover of the town centre.

12.28 A summary of the market shares of Bromley town centre from each of the ten survey zones is provided in **Table 12.5.** This also shows the equivalent market share identified at the time of the 2012 Study, to enable an understanding of how the market share of the town centre has changed since the 2012 Study to be gained.

12.29 Whilst caution should always be taken in comparing the datasets, due to the amount of time which has lapsed between the studies, and also potential nuanced differences in the undertaking of the respective primary data for each study, the general clear trend which can be seen from Table 12.5 is that Bromley town centre has lost market share over the last 12 years, including a decline of -5.7% market share from its core catchment (zone 1) and a decline of -3.7% from zone 2 and -12.1% from zone 3 which represent its secondary catchment. This indicates that the overall attractiveness of Bromley town centre as a shopping destination has reduced in recent years, and whilst it is positive to see the centre still commanding strong market shares particularly from its primary catchment, the consistent pattern of declining market share from across the survey area does represent some cause for concern.

Table 12.5 Zonal analysis of Bromley town centre comparison goods market share and change since 2012 Retail Study

Zone number	Zone name	Bromley town centre comparison goods market share 2024 %	Bromley town centre comparison goods market share 2012 %	Change %
1*	Bromley MTC & Beckenham	42.9%	48.1%	-5.2%
2*	Orpington	19.5%	23.2%	-3.7%
3*	Biggin Hill	21.0%	33.1%	-12.1%
4	Swanley	0.9%	9.0%	-8.1%
5	Shoreham & Kemsing	4.1%	5.2%	-1.1%
6	Sevenoaks	5.7%	8.2%	-2.5%
7	Croydon South	9.8%	12.5%	-2.7%
8*	Croydon North	5.6%	6.5%	-0.9%
9*	Lewisham	8.6%	32.7%	-24.1%
10	Sidcup & Bexley	7.6%	13.0%	-5.4%

**denotes zone which falls wholly or partially within LBB. Source: Table CM4, Appendix 1 (for 2024 data), 2012 Retail Study (for 2012 data)*

Orpington town centre

12.30 Turning to Orpington, we have previously identified that the town centre faces competition from the concentration of retail warehousing to the north of the town centre, focussed on Nugent Shopping Park. The analysis in **Table 12.6** shows that for each of the ten survey zones, the retail warehousing collectively attracts a significantly higher market share for comparison goods shopping than the town centre; for example in zone 2 (which covers the Orpington area itself), the retail parks attract a market share of 26.6% and the town centre a market share of 18.4%. In zone 3, to the south of Orpington, the retail parks attract a higher market share despite being located a further distance from many residents in the Borough than the town centre.

12.31 Table 12.6 also shows that in some zones where the town centre does not feature significantly as a comparison goods shopping destination, the retail warehousing pulls a more noteworthy market share — particular examples of this are zone 4 and zone 10.

12.32 Also in Table 12.6, we undertake comparative analysis of Orpington town centre's market share with that identified in the 2012 Study. This shows that the town centre has lost market share from across the survey area since the 2012 Study, although it is interesting to note that from many zones the decrease in market share is relatively incremental and from four of the ten zones the decrease is under 1.0%. More concerning is the fact that from the two zones which represent Orpington's main catchment – zone 2 and zone 3 – the decline in market share has been much more pronounced, with market share decreasing by 13.9% from its local zone, zone 2, and by 10.4% from zone 3.

Table 12.6 Zonal analysis of Orpington town centre comparison goods market share and change since 2012 Retail Study

Zone number	Zone name	Orpington town centre comparison goods market share 2024 %	Orpington retail warehousing comparison goods market share 2024 %	Orpington town centre comparison goods market share 2011 %	Change in town centre market share %
1*	Bromley MTC & Beckenham	0.9%	6.4%	1.7%	-0.8%
2*	Orpington	18.4%	26.6%	32.3%	-13.9%
3*	Biggin Hill	14.8%	16.5%	25.2%	-10.4%
4	Swanley	1.3%	13.9%	2.0%	-0.7%
5	Shoreham & Kemsing	3.5%	9.5%	5.6%	-2.1%
6	Sevenoaks	0.1%	1.0%	1.0%	-0.9%
7	Croydon South	0%	0.5%	0%	0.0%
8*	Croydon North	0%	1.0%	0%	0.0%
9*	Lewisham	0%	0.2%	0%	0.0%
10	Sidcup & Bexley	0.9%	8.1%	1.5%	-0.6%

**denotes zone which falls wholly or partially within LBB. Source: Table CM4, Appendix 1 (for 2024 data), 2012 Retail Study (for 2012 data)*

Assessment of trading performance (Step 3)

12.33 Table CM8a of Appendix 1 shows that, on average, comparison goods floorspace in LBB is trading at £5,248 per sq.m at 2024. This figure represents the combined trading performance of comparison goods floorspace in town, district and local centres, and retail warehousing / out of town floorspace in the Borough. We consider that the sales density performance is broadly in line with what we would expect in the context of the catchment.

Other inputs into the quantitative need assessment

Sales efficiency

12.34 It is also necessary to factor in changes in respect of 'sales efficiencies'; this is the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs, such as rents, rates and service charges, by increasing their average sales densities. Sales efficiency rates are provided by Experian in RP21 and for comparison goods floorspace the following rates have been applied:

Period	2024-25	2025-26	2026-41^
Sales efficiency rate used	-2.6%	2.0%	2.6% per annum

Source: Experian Retail Planner Briefing Note 21 ^Experian forecast up to 2040, annual sales efficiency rate for the period 2030-40 has been carried forward to 2041.

Floorspace data

12.35 The comparison goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

'Commitments' for new comparison goods retail floorspace

12.36 In calculating retail floorspace capacity, it is necessary to deduct 'commitments' for new comparison goods floorspace — this is comparison goods floorspace which has been permitted but was not trading at the time of the household telephone survey undertaken in support of this study. These commitments will thus act as a 'claim' on the future amount of comparison goods floorspace which needs to be planned for.

12.37 We have reviewed commitments data provided by LBB and identify in **Table 12.7** the commitments which are deducted from the growth in comparison goods expenditure capacity which we have identified as being expected to come forward in the Borough. The most significant of these is permission which has been granted for a new B&Q Warehouse on the site of a former car showroom at Elmers End / Eden Park, which will extend to a sales area of 570 sq.m and for which we anticipate a turnover in the region of £1.0m per annum by 2023. Table 12.7 shows that overall, we estimate the commitments for convenience goods floorspace to have turnover potential in the region of £1.4m at 2034, increasing indicatively to £1.5m by 2041; in relative terms therefore the 'claim' on expenditure is relatively limited.

12.38 It can be seen from Table 12.7 that we have grouped the commitments into three geographical areas — 'urban north' (which covers all of zone 1 and those parts of zones 8 and 9 within LBB); 'Orpington and Petts Wood' (which covers zone 2) and 'rural south' which covers zone 3. There are in turn used to clearly identify the future quantitative needs in different parts of the Borough.

Table 12.7 Comparison goods floorspace 'commitments'

	Estimated net sales area (comparison goods only)	Estimated comparison goods turnover 2029 (£m)	Estimated comparison goods turnover 2034 (£m)	Estimated comparison goods turnover 2041 (£m)
Urban north (zones 1, 8 (part) 9 (part)				
B&Q, Eden Park	570	0.9	1.0	1.2
Orpington & Petts Wood				
High Street, Orpington	180	0.5	0.5	0.7
Rural south (zone 3)				
(No identified commitments)	-	-	-	-
Total	**750**	**1.4**	**1.5**	**1.8**

Source: Table CM7, Appendix 1

Identification of comparison goods capacity

12.39 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 12.8**.

12.40 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.

12.41 It is reiterated that 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 2031 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 12.8 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 *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).*

12.42 Table 12.8 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.

12.43 However, there is also a need to look at needs at a more localised level, and in order to assist the Council in strategic planning for the distribution of growth, in **Tables CM8b to CM8d of Appendix 1,** the overall qualitative 'need' requirement is considered on a localised basis, with the forecasts split as follows:

- Table CM8b sets out the quantitative 'need' for the urban north of the Borough, covering zone 1, and those parts of zones 8 and 9 which fall within LBB;
- Table CM8c sets out the need for zone 2, i.e. Orpington / Petts Wood area;
- Table CM8d sets out the need for zone 3, i.e. the rural south of the Borough.

12.44 A summary of the quantitative need for additional comparison goods floorspace at the sub-area level, sourced from the above tables, is shown in **Table 12.9.** It shows that, for each of the three sub-areas, there is no positive requirement for additional comparison goods floorspace over the period to 2034 or 2041.

12.45 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. Please refer to the Strategic Recommendations in Section 15 of this report for further discussion of this.

12.46 The same approach of treating applications on individual merits should also be applied to proposals which result in a net loss of comparison goods floorspace — the fact that a modest oversupply of comparison goods floorspace has been identified does not mean the council should objectively seek to resist the loss of further comparison goods floorspace in the Borough. Indeed, a net loss of floorspace may not inherently be of concern, particularly if it is to be replaced by more modern floorspace, and if, for example, a proposal sought the loss of out-of-centre floorspace, there may be scope for nearby town centres to benefit from redirected spending from local residents. On the other hand, proposals which resulted in the loss of a significant amount of comparison goods floorspace in a prime shopping location may compromise the overall vitality and viability of the centre in question, and may therefore not be appropriate. For this reason, proposals should be considered on individual merits and any loss of floorspace considered as part of the overall planning balance.

Table 12.9 Estimated comparison goods floorspace need by sub-area, 2024-41

Interval year	Household survey zone	2029	2034	2041*
Estimated comparison goods floorspace requirement (sq.m net, rounded)– urban north	1, 8 (part), 9 (part)	-1,100	-1,400	-100
Estimated comparison goods floorspace requirement (sq.m net, rounded) – Orpington / Petts Wood	2	-400	-600	-100
Estimated comparison goods floorspace requirement (sq.m net, rounded) – rural south	3	0	0	0

*Source: Table CM8b,c,d, Appendix 1 *forecasts for 2041 should be considered indicative. Please note that all figures are cumulative.*

Scenario testing – GLA Population Projections

12.47 As we have set out above, our 'baseline' comparison goods quantitative needs assessment is based on population projections at the zonal level which have been provided by the data provider Experian. This is considered to present a robust approach in the context that they represent past trends-based projections, and also are bespoke to each of the nine survey zones having regards to the fact that most of the individual zones cross at least one local planning authority area.

12.48 However, as a 'scenario test', we have also run an alternative set of quantitative need calculations which applies population projections which have been published by the Greater London Authority ('GLA'). It is considered beneficial to undertake this assessment because the GLA publish housing-led projections (at both the local authority and ward level). The housing-led projections are described by the GLA as follows:

> *'The housing-led projections reconcile future population growth with available housing supply by incorporating a housing supply trajectory. The housing-led projections are recommended for most local planning purposes, and the 10-year variant can be considered the default variant.'*

12.49 On the basis of the above, we have had regard to the GLA's 2021-based "Housing Targets 10-year migration" set of forecasts, which provide annualised housing target-based population projections for each of the London Boroughs, running over the period to 2041, and calculated an alternative set of population projections for the survey area based on this, using the following methodology:

12.50 <u>Step 1</u> – Assign each zone to an LPA area. As we are using growth rates deriving from Borough-wide projections, the first step is to assign each survey zone to a Borough under which the majority of the geographical extent of the Borough falls within. This exercise has been undertaken for zones 1, 2, 3, 7, 8, 9 and 10. Zones 4, 5 and 6 fall predominantly within Sevenoaks Borough and therefore are not the subject of GLA projections; for these zones we therefore continue to use Experian projections (i.e. the population projection for these zones are unchanged from those in the 'baseline' assessment). In the remainder of the survey area, the following assignment of Boroughs has been applied:

- Zones 1, 2 and 3 – LB Bromley
- Zones 7 and 8 – LB Croydon
- Zone 9 – LB Lewisham
- Zone 10 – LB Bexley and RB Greenwich.

12.51 <u>Step 2</u> – For each of these zones, we have identified the population forecast for 2024 (the base year of the study), as well as the interval years of 2029, 2034 and 2041 for each of the Boroughs, and calculated the growth rate between each of these years at the Borough level (in percentage terms). We then apply these percentage growth rates to the base year Experian projections at the zonal level (which are 2022-based).

12.52 The exercise identifies some differences in the population projections at the zonal level, which will, under GLA forecasts, deliver lower levels of population growth to the Bromley zones (zones 1, 2 and 3) and higher levels elsewhere. **Table 12.10** compares the population projections at 2034 and 2041 under the 'baseline' (Experian) and GLA models.

Table 12.10 Comparison of population projections under 'baseline' (Experian) and GLA-based population housing-led population projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
2034											
Baseline	195,123	89,782	46,284	46,832	23,922	49,283	132,623	192,491	330,851	161,390	**1,268,581**
GLA	190,551	87,678	46,534	46,832	23,922	49,283	140,113	201,530	317,530	168,238	**1,272,211**
Difference	*-4,572*	*-2,104*	*250*	*0*	*0*	*0*	*7,490*	*9,039*	*-13,321*	*6,848*	***3,630***
2041											
Baseline	200,312	91,594	47,037	47,961	24,270	50,510	134,274	197,006	339,836	164,681	**1,297,481**
GLA	192,358	88,509	46,975	47,961	24,270	50,510	146,321	210,459	321,011	174,021	**1,302,397**
Difference	*-7,954*	*-3,085*	*-62*	*0*	*0*	*0*	*12,047*	*13,453*	*-18,825*	*9,340*	***4,916***

Source: Baseline projections from Table CM1, Appendix 1. GLA projections - Firstplan application of GLA 2021-based demographic projections, ward population projections for London Borough, Housing Targets, 10-year migration, NUTS2, Constrained

12.53 **Table 12.10** shows that overall, under the GLA model, levels of population growth are 3,630 persons higher across the survey area as a whole than under the baseline model; this increases to 4,916 persons higher by 2041. However, this population growth is driven by GLA-based projections being higher in zones 7 and 8 (LB Croydon) and zone 10 (LB Bexley and RB Greenwich). GLA projections forecast lower levels of growth for LB Bromley than Experian, meaning that the total population growth in zone 1 will be 7,954 persons lower in zone 1 at 2041 and 3,085 persons lower in zone 2, although zone 3 projections broadly reflect those of Experian. Overall, across the Bromley zones (zone 1-3), it can be estimated that that levels of population growth will be 11,100 persons lower at 2041 relative to the Experian forecasts. GLA projections also forecast lower levels of population growth for LB Lewisham (zone 9) than Experian.

Impact on comparison goods need forecasts

12.54 The lower levels of population growth will impact on identified levels of quantitative comparison goods need, as population growth is one of the key components in identifying the extent to which a 'need' for additional retail floorspace in the future will be required. The 'baseline' comparison goods need assessment has identified an oversupply of comparison goods floorspace in the Borough (i.e. a negative quantitative need) over the period to 2041; under the GLA scenario as there is lower population growth this level of over-supply increases marginally. This is summarised in **Table 12.11**, which shows the 'baseline' figures previously summarised above along with those under the GLA scenario, both at the Borough-wide level and in the three aforementioned sub-areas.

Table 12.11 Estimated comparison goods floorspace need for LBB 2024-2401, baseline & GLA scenarios

Interval year	Household survey zone	Model	2029	2034	2041*
Estimated comparison goods floorspace requirement (sq.m net, rounded)– Borough-wide	1, 2, 3, 8 (part), 9 (part)	Baseline	-1,500	-2,000	-200
		GLA	-1,700	-2,500	-1,300
Estimated comparison goods floorspace requirement (sq.m net, rounded)– urban north	1, 8 (part), 9 (part)	Baseline	-1,100	-1,400	-100
		GLA	-1,200	-1,700	-800
Estimated comparison goods floorspace requirement (sq.m net, rounded) – Orpington / Petts Wood	2	Baseline	-400	-600	-100
		GLA	-500	-800	-500
Estimated comparison goods floorspace requirement (sq.m net, rounded) – rural south	3	Baseline	0	0	0
		GLA	0	0	0

*Source: Table CM8b,c,d, Appendix 1 (for baseline forecasts) *forecasts for 2041 should be considered indicative. Please note that all figures are cumulative.*

SECTION 13 | CONVENIENCE GOODS SHOPPING PATTERNS & IDENTIFICATION OF NEED

13.1 In this section we set out the quantitative need for **larger-format foodstore convenience goods retail floorspace in LBB.** The approach to the calculation of convenience goods need largely reflects that used to calculate comparison goods need, as set out in the previous section, and therefore we do not seek to repeat the methodology in detail. The analysis set out in this section should be read alongside the retail capacity tabulations for convenience goods at **Appendix 2**. In common with the comparison goods forecasts in the previous section, it is advised that longer-term forecasts (i.e. those beyond the next ten years) are considered indicative and should be subject to further review and update during the Plan period. The forecasts are for larger-format foodstore need which requires a greater element of strategic planning and does not include small-scale/local convenience goods shopping.

Survey area definition and population growth (Step 1a)

13.2 Please refer to the explanation in **Section 12** of this report in respect of these matters.

Available expenditure in the survey area (Step 1b)

13.3 Experian identify a 'per capita' spend (spend per head) on convenience goods for each of the seven survey zones, which are shown in Table CV2 of Appendix 2. This shows that per capita spend on convenience goods ranges from £2,348 in zone 7 (Croydon North) to £3,142 in zone 6 (Sevenoaks). The average per capita spend for the survey area is £2,672 zones which cover LBB in full (zones 1, 2 and 3) is £2,666. Both these figures sit slightly above the UK average of £2,621 (at 2022).

13.4 Experian advise that per capita spend on convenience goods will not be subject to the same levels of growth as comparison goods. Experian forecast a decline in per capita spending on convenience goods for the period 2022-2026, as personal spending recalibrates after the significant growth in convenience goods spending seen during the Covid-19 pandemic and associated lockdowns. From 2026 to 2030, Experian forecast that per capita growth will remain static, with a minor uptick of 0.1% per annum for the remainder of the study period to 2041[56]. It is reiterated that longer term growth rates beyond 2031 are considered indicative.

13.5 As with comparison goods shopping, it is necessary to make an adjustment to the baseline Experian figures to allow for SFT to be removed from the retail capacity forecast. This exercise is set out at **Table CV3 of Appendix 2.** The proportion of total spend which has been deducted is derived from the household survey results, and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in Experian's Retail Planner Briefing Note 21, as summarised in **Table 13.1.**

13.6 Online shopping for convenience goods has historically had lower levels of take-up than for comparison goods shopping, but the evidence from the household survey is that it now accounts for an average of 20.0% of total convenience goods spend across the survey area (i.e. £1 in every £5), with a peak of 25.7% in zone 1 (Bromley MTC & Beckenham). The survey area average is significantly in excess of the UK average figures identified by Experian in RP21, which identify a UK average SFT of 5.2% at 2024. This indicates therefore that online shopping for convenience goods acts as a greater claim on total spend across the survey area than across the UK as a whole.

[56] Experian currently only project expenditure growth as far as 2040 and therefore we have extrapolated growth rates for the year 2039-40 onwards to 2041.

13.7 If Experian's UK average SFT growth rates are applied to the current survey area average figure of 20.0%, it means that by the end of the study period at 2041, SFT could account for up to 21.1% of total convenience goods spend. Therefore, whilst growth in convenience goods SFT is clearly more muted than for comparison goods spending as discussed in the previous section, it will still account for a noteworthy 'claim' on spending throughout the Plan period.

Table 13.1 Convenience goods SFT adjustments

	2024 (study base year)	2029 (interval year)	2034 (interval year)	2041 (interval year)
UK average – Experian Retail Planner 21 Feb 2024)	5.2%	6.3%	7.0%	7.4%
Change from previous interval period	-	1.1%	0.7%	0.4%
Survey area average with growth from ERP applied	20.0%	21.1%	21.8%	22.2%

Source: household survey results & Experian Retail Planner Briefing Note 21 (RP21)

13.8 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2041. This exercise is also set out in **Table CV3 (Appendix 2)**. Table CV3 shows that, having made allowance for SFT, convenience goods spend in the survey area is currently (2024) £2,292.4m; this is forecast to increase to £2,305.5m by 2034 and indicatively £2,360.2m by 2041. Therefore, growth in convenience goods spend in the survey area is expected to be relatively limited at just +£67.8m over the course of the survey period to 2041.

Shopping patterns in the survey area (Step 2)

13.9 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.

13.10 The total convenience goods market share which each convenience goods shopping destination draws from the survey area is shown in the final column of **Table CV5a of Appendix 2**. Reflecting the discussion set out above, it shows that 82.7% of available convenience goods expenditure is retained within the survey area (known as the 'retention rate'). This points to generally sustainable patterns of convenience goods shopping over the survey area as a whole, and from analysis of the household survey results it is apparent that the convenience goods expenditure which is 'leaking' outside the survey area is only going a short distance — largely to foodstores in the Crayford and Dartford areas, and for some residents in the survey area these locations will be in closer proximity than foodstores within the survey area itself.

13.11 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). This exercise is set out in **Table 13.2.** As with the comparison analysis in the previous section, the shaded boxes indicate where a store has a 'dominant' market share (30%+ from any individual zone) or 'secondary' market share (10-30% from any individual zone). It is noted that are no foodstores which have a 'dominant' influence on shopping patterns within any of the LBB zones.

Table 13.2 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

13.12 Table 13.2 shows that there are distinct trends to patterns of convenience goods in the Borough. 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.

13.13 Elsewhere in zone 1, the foodstore which attracts the second-highest market share is a Lidl supermarket within the Burnt Ash Lane neighbourhood centre in Sundridge Park, which attracts a market share of 6.5%; this store was operated by Waitrose prior to its disposal to Lidl. The Sainsbury's in Bromley town centre attracts a market share of 4.9% and the Lidl store on Bromley High Street attracts a market share of 4.0%; both of these stores' location within Bromley town centre offers the potential for linked shopping trips to other town centre services and facilities to be undertaken.

13.14 Market shares in zones 8 and 9 are similarly fragmented although it is noteworthy that the Sainsbury's store which can be considered the anchor store to the district centre at Crystal Palace attracts a market share of 6.1% from residents in zone 8.

13.15 In the more suburban and rural parts of the Borough, there is greater evidence of polarisation towards a small number of larger-format foodstores as consumer choice becomes more limited, and the format of the foodstore offer is more orientated towards large stores with big car parks, to which it can be expected that many respondents choose to drive to. The Tesco Extra store in Orpington town centre attracts the highest market share from residents in both zone 2 (Orpington) and zone 3 (Biggin Hill), at 17.8% and 15.2% respectively. These can be considered strong market shares and evidence that this store is well used by residents in this part of the survey area; it also confirms that the Council should seek to fully capture linked shopping trips to the rest of Orpington town centre, within which this store sits, in order to support its vitality.

13.16 In zone 2, the Sainsbury's stores within Chislehurst local centre and on the edge of Locksbottom local centre also attract strong market shares, which again has positive implications for the vitality of the respective wider centres. Similarly in zone 3 it can be seen that the Waitrose store, which anchors the local centre at Biggin Hill, also attracts a strong market share.

Convenience goods turnover by centre (larger foodstores)

13.17 It should be noted that, because of the highly fragmented nature of convenience shopping patterns in the urban zones, there are a large number of supermarkets which individually attract relatively low market shares but collectively, when considered with other supermarkets within a defined centre, can amount to a significant combined market share. In turn, when converted to spending patterns, this combined market share can amount to a centre having a substantial convenience goods turnover.

13.18 For example, foodstores in West Wickham have a combined turnover of £56.0m from the survey area, which is significantly in excess of the comparison goods turnover of the centre (£15.8m). In Orpington, which as our analysis in the previous section has demonstrated has seen a decline in its comparison goods role and function since the Council's previous study in 2012, the convenience goods turnover of the town centre (£75.4m) is also comfortably in excess of its comparison goods turnover (£46.7m). Overall, however it is considered that foodstores make a significant contribution to the overall vitality and viability of centres at all levels of the Borough's retail hierarchy, including Bromley town centre.

Assessment of trading performance (Step 3)

13.19 **Table CV6 of Appendix 2** sets out an overview of trading performance of convenience goods floorspace in LBB, to establish whether this floorspace can be considered to be trading in line with 'benchmark' levels (i.e. company averages for national operators), or whether stores are 'overtrading' (performing at above average levels) or 'under-trading' (performing at below average levels). This exercise is only undertaken for the named larger foodstores in the Borough rather than for local/independent specialist retailers, where there are considerably wider fluctuations in sales density and where there is often a tendency for usage to be under-reported in household survey data. A store which is 'overtrading' is likely to be displaying qualitative evidence of strong trading performance, such as consistently busy car parks (where applicable), long queues within the store, stock replenishment during trading and so on. A store which is 'undertrading' may exhibit the opposite of these characteristics. However, a store may also be undertrading because of operational inefficiencies in its design / layout, or having an excess of sales area floorspace relative to optimum company requirements.

13.20 The extent of 'overtrading' and undertrading' of convenience goods floorspace is factored into the quantitative need tabulations, working on the principle that overtrading floorspace can, in theory, equate to pent up demand for additional provision whilst undertrading floorspace can be a sign of oversupply of convenience goods floorspace. On average across the Borough, the analysis in Table CM6 identifies these 'main' foodstores are trading with an aggregate convenience goods sales density (turnover per sq.m) of approximately £13,322 per sq.m, which can be considered to a strong sales density and an indication that larger foodstore floorspace in the Borough trades well.

13.21 Table CV6 of Appendix 2 also sets out an analysis of the trading performance of the individual foodstores in the Borough. The final column of Table CV6 shows the difference between the ‘benchmark’ trading performance (which is calculated by applying the net convenience goods sales area of the store, to the company average turnover per sq.m for convenience goods sales), and the ‘actual’ turnover, which is derived from the household survey results as set out in Table CV5a of Appendix 2 (for 2024). The analysis is broken down by survey zone. In can be seen that:

- **In zone 1**, foodstores are trading broadly in equilibrium with UK averages across the zone as whole, with the aggregate position being a marginal ‘under-trading’ of -£1.8m. Within this zone, based on the household survey results it can be seen that a number of foodstores are trading very strongly, including most notably the Tesco at Homesdale Road in Bromley and the new Lidl store in West Wickham town centre, and the strong performance of these stores is countering under-trading at a large number of stores including all of the foodstores in Beckenham town centre, the Waitrose in Bromley, and the Sainsbury’s in Penge.

  However, as we have set out above, the nature of convenience shopping in this part of the Borough is considered likely to be fluid and many residents will have access to multiple foodstore offerings within relatively close distance. This in turn means customers may not always be ‘brand loyal’, or always shop at the same place for their food shopping.

  The household survey asks questions on where residents undertake their main food shopping the most recent time, and the time before that, but this may not fully capture the fact that some residents may shop at multiple different large food shops. It is for this reason we consider the robust position is to look at the aggregate trading performance of foodstores across a centre or zone.

  That said, the survey results for zone 1 indicate that all foodstores in Beckenham town centre are under-trading, as is the Sainsbury’s in Penge which is the sole foodstore anchor, and the performance of these stores should be kept under review in future updates to this study. From our visits to the centres it was observed that most of the stores in question were relatively busy, with the exception of the Sainsbury’s in Beckenham which does not benefit from a particularly welcoming store environment compared to the Waitrose and M&S stores in the town centre.

- Turning to **zone 2**, it appears that foodstores are generally trading well, and there is an aggregate position of ‘overtrading’ in the region of +£24.4m against operator benchmarks. This is being driven by a very strong trading performance of the Tesco Extra store in Orpington town centre, which is shown as trading at +£41.3m above operator average. Most other foodstores in zone 2 are also trading at above benchmark levels, albeit not to the extent of the Tesco store. It is noted that the Sainsbury’s store in Orpington town centre and the Morrisons store in Petts Wood district centre are shown to be under-trading by approximately -£14.3m and -£9.9m respectively.

- In **zone 3,** there are only two main foodstores – Waitrose stores in Biggin Hill local centre and Green Street neighbourhood centre. The Biggin Hill store is shown as under-trading by approximately -£7.4m and the Green Street store to be over-trading by approximately +£1.6m. Accordingly the net position for the zone is one of under-trading in the region of -£5.8m.

- In **zone 8**, the only main foodstore which falls within LBB is the Sainsbury’s store in Crystal Palace, which is identified as marginally under-trading.

- In **zone 9**, the only main food stores which fall within LBB are the Lidl stores at Mottingham and Sundridge Park, both of which are trading comfortably above average (and in the case of the Sundridge Park store, quite significantly so).

13.22 With regards to the above discussions, it is important to note that the identified financial overtrading of floorspace should not be considered a particular cause for concern, unless it is resulting in qualitative compromises to the performance of the floorspace, e.g. excess queuing for car parks, shelves needing to be constantly replenished during trading hours and so on. Indeed, in the case of convenience goods floorspace within defined town centres, a strong performing foodstore will likely be resulting in higher levels of linked trips spending with other retailers and operators in the town centre, supporting its overall vitality and viability. **Therefore, the overtrading of existing floorspace should not, in most circumstances, by itself represent a 'need' for additional development.**

Other inputs into the quantitative convenience goods needs assessment

'Commitments' for new convenience retail floorspace

13.23 As set out in the previous section, it is necessary to deduct 'commitments' for new retail (class E) floorspace which has been permitted but was not trading at the time of the household telephone survey undertaken in support of this study. These commitments will thus act as a 'claim' on the future amount of floorspace which needs to be planned for.

13.24 We have reviewed commitments data provided by LBB and identify in **Table 13.3** the commitments which are deducted from the growth in convenience goods expenditure capacity which we have identified as being expected to come forward in the Borough. There are three convenience goods commitments, the most significant of which (in terms of 'claim' on expenditure) is the planning permission which has been granted, subject to legal agreement, for a new Aldi foodstore on the site of a former Frankie & Benny's restaurant on the A21 at Farnborough Way, south of Locksbottom. Table 13.3 shows that overall, we estimate the commitments for convenience goods floorspace to have turnover potential in the region of £13.5m at 2034, increasing indicatively to £13.6m by 2041.

13.25 It can be seen from Table 13.3 that we have grouped the commitments into three geographical areas — 'urban north' (which covers all of zone 1 and those parts of zones 8 and 9 within LBB); 'Orpington and Petts Wood' (which covers zone 2) and 'rural south' which covers zone 3. As set out in the previous section, we use these distinctions to clearly identify the future quantitative needs in different parts of the Borough.

Table 13.3 Commitments for convenience goods floorspace[57]

	Estimated net sales area (convenience only)	Estimated convenience goods turnover 2029 (£m)	Estimated convenience goods turnover 2034 (£m)	Estimated convenience goods turnover 2041 (£m)
Urban north (zones 1, 8 (part) 9 (part)				
Blenheim Centre redevelopment, Penge**	115	1.5	1.6	1.6
Orpington & Petts Wood				
High Street, Orpington	180	1.3	1.3	1.3
Aldi, Locksbottom	746	10.6	10.7	10.8

[57] The redevelopment of the Waitrose supermarket in Bromley town centre (which is minded to be approved at the time of preparation of this study) proposes a marginal decrease in the net sales floor area and therefore is not included within Table 13.3.

Rural south (zone 3)				
(No identified commitments)	-	-	-	-
Total	**1,041**	**13.4**	**13.5**	**13.6**

*Source: Table CV7, Appendix 2 **note – net additional floorspace allowing for demolition of existing Iceland store. Application is at Stage 2 Mayoral Assessment at the time of preparation of this study.*

Sales efficiency

13.26 The following sales efficiency rates have been applied for the convenience goods capacity forecasts, based on forecasts set out in RP21; as can be seen sales efficiency growth is expected to be minimal throughout the duration of the Plan period, meaning there is limited scope for the improved sales performance of existing floorspace to act as a 'claim' on the need for additional convenience goods floorspace.

Period	2024-25	2025-26	2026-30	2030-41^
Sales efficiency rate used	-0.1%	0%	0.2% per annum	0.1% per annum

Source: Experian Retail Planner Briefing Note 21 ^Experian forecast up to 2040, annual sales efficiency rate for the period 2030-40 has been carried forward to 2041.

Floorspace data

13.27 The convenience goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including IGD, Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

Identification of convenience goods capacity

13.28 Having considered all of the above matters, **Table 13.4** sets out a summary of the quantitative 'need' for new larger-format convenience goods floorspace which the Council should plan for in its new Local Plan period. We have assumed that new convenience goods floorspace will achieve a turnover of £13,364 per sq.m (at 2024), which represents the current average sales density of convenience goods retailers who operate stores capable of meeting main food shopping needs; that is to say Aldi, Asda, Lidl, Morrisons, M&S, Sainsbury's, Tesco and Waitrose. This sales density will improve in line with the rates set out in the section 'sales efficiency', above.

13.29 As with the comparison goods capacity forecasts, we advise that forecasts become increasing 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 again based on a 'constant market share' approach. It should be noted that the figures in **Table 13.4** are cumulative.

Table 13.4 LBB-wide need for larger-format foodstore convenience goods floorspace

Interval year	2029	2034	2041*
Estimated convenience goods floorspace requirement (sq.m net, rounded) – larger-format foodstores	300	500	1,200

*Source: Table CV8a, Appendix 2 *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).*

13.30 Table 13.4 shows that there is a limited positive quantitative need for additional convenience goods floorspace in the Borough over the course of the new Local Plan period, with an identified requirement of 500 sq.m net at 2034, increasing indicatively to 1,200 sq.m net by the end of the Plan period. This is a relatively low level of need – a figure of 1,000 sq.m net is broadly equivalent to the sales areas of an Aldi or Lidl store for example – but does nevertheless present a positive requirement which the Council will need to plan for.

13.31 To assist the Council in strategic planning for the distribution of growth, in **Tables CV8b to CV8d of Appendix 2,** the overall qualitative 'need' requirement is considered on a localised basis, with the forecasts split as follows:

- Table CV8b sets out the quantitative 'need' for the urban north of the Borough, covering zone 1, and those parts of zones 8 and 9 which fall within LBB;
- Table CV8c sets out the need for zone 2, i.e. Orpington / Petts Wood area;
- Table CV8d sets out the need for zone 3, i.e. the rural south of the Borough.

13.32 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 13.5**.

Table 13.5 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 CV8b,c,d, Appendix 2 *forecasts for 2041 should be considered indicative. Please note that all figures are cumulative.*

13.33 Table 13.5 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:

- The overall Borough-wide need figures (as presented in Table 13.4) are tempered by a marginal over-supply in zone 3 (the rural south of the Borough), and accordingly there is no quantitative need for the Council to plan for any additional convenience goods floorspace in this 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 2034.

- The figure of 200 sq.m net for zone 2 (the Orpington / Petts Wood area) does not point to a quantitative need for additional larger-format convenience goods provision in this part of the Borough, and indeed the need in this area is likely to have been largely captured by the extant consent for a new Aldi store at Locksbottom.

13.34 Whilst the quantitative need increases over the remainder of the Plan period, as per previous advice it is considered that these figures should be subject to review in due course and therefore consider it sensible that the Council actively plans for the quantitative needs identified for the period to 2034.

Combined Class E(a) floorspace need

13.35 The previous section of this report identified the requirement for additional Class E(a) comparison goods floorspace for the Borough over the Council's new Plan period, and above we have identified the equivalent need for additional Class E(a)convenience goods floorspace. As set out in Section 2 of this report, it is recognised that the Government promotes flexibility in use of floorspace, as indicated by the wide range of goods which fall under class E. With this in mind, **Table 13.6** sets out the total 'need' for floorspace, combining the individual comparison and convenience goods requirements. However, it is noted that particularly in respect of convenience goods need, we have identified location-specific requirements, and therefore on this basis the use of appropriate planning conditions restricting the use of floorspace to sub-classes of class E and ranges of goods is considered justifiable.

13.36 Table 13.6 shows that when combining the individual comparison and convenience goods need figures (both of which fall under Class E(a), as noted above) there is no quantitative requirement for additional floorspace over the period to 2034 across each of the three sub-areas and, indicatively, only a very small requirement (100 sq.m net) for the urban north sub-area by 2041.

Table 13.6 Combined Class E(a) floorspace need by sub-area

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

*Source: Table 12.9, Table 13.5. Please note that all figures are cumulative. *forecasts for 2041 should be considered indicative.*

Scenario testing – GLA Population Projections

13.37 In the previous section, we set out our methodological approach for undertaking a 'sensitivity test' of the baseline need figures to have regard to housing trajectory-led population projections which have been produced by the

Greater London Authority. The methodological approach behind calculating these projections is set out at paragraphs 12.50 to 12.52 of the previous section. Adopting the same approach as set out in the previous section for calculating convenience goods need identifies a reduced quantitative convenience goods need for each of the sub-areas relative to the baseline position set out in **Table 13.5**. However, there remains a positive need for additional provision at both 2034 and 2041 in the urban north and Orpington / Petts Wood sub-areas.

Table 13.7 Estimated convenience goods floorspace need for LBB 2024-2401, baseline & GLA scenarios

Interval year	Household survey zone	Model	2029	2034	2041*
Estimated convenience goods floorspace requirement (sq.m net, rounded)– Borough-wide	1, 2, 3, 8 (part), 9 (part)	Baseline	300	500	1,200
		GLA	200	300	800
Estimated convenience goods floorspace requirement (sq.m net, rounded)– urban north	1, 8 (part), 9 (part)	Baseline	600	700	1,100
		GLA	600	700	1,000
Estimated convenience goods floorspace requirement (sq.m net, rounded) – Orpington / Petts Wood	2	Baseline	200	200	500
		GLA	100	100	200
Estimated convenience goods floorspace requirement (sq.m net, rounded) – rural south	3	Baseline	-500	-500	-400
		GLA	-400	-400	-400

*Source: Table CV8b,c,d, Appendix 1 (for baseline forecasts) *forecasts for 2041 should be considered indicative. Please note that all figures are cumulative.*

SECTION 14 | COMMERCIAL LEISURE ASSESSMENT

14.1 As previously identified, 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.

14.2 This section of the study will provide a comprehensive review of the commercial leisure offer within the Borough informed by the findings of the household telephone survey undertaken in support of this study. In addition, the amount of growth of expected with the commercial leisure sector will be identified. The term 'commercial leisure' will be used to describe all town centre-based activities such as bars, pubs, restaurants, cafes, cinemas, theatres, cultural venues such as museums and exhibition spaces, health & fitness facilities, and entertainment facilities such as ten-pin bowling and bingo.

Overall patterns of commercial leisure visits across the survey area

14.3 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
- 26% of residents in the survey area visit entertainment venues;

14.4 We will discuss each of these categories in further detail below. For each category we present an analysis of the top three destinations for the category for the survey area as a whole; followed by an analysis of the three destinations attracting the highest market share from each of the survey zones which fall wholly or partly within LBB — namely zone 1 (Bromley town centre & Beckenham); zone 2 (Orpington); zone 3 (Biggin Hill); zone 8 (Croydon – partly within LBB) and zone 9 (Lewisham – partly within LBB).

Visits to restaurants

Table 14.1 Patterns of visits to restaurants

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Central London/West End (9.9%)	Bromley town centre (7.8%)	Chislehurst local centre (4.4%)

Zone 1 – Bromley MTC & Beckenham	Bromley town centre (35.9%)	Beckenham district town centre (11.78%)	Central London/ West End (8.7%)
Zone 2 – Orpington	Chislehurst local centre (28.1%)	Central London/ West End (18.0%)	Orpington town centre (16.5%)
Zone 3 – Biggin Hill	Orpington town centre (21.4%)	Locksbottom local centre (13.8%)	Bromley town centre (13.0%)
Zone 8 – Croydon*	Central London/ West End (14.2%)	Croydon town centre (12.3%)	Crystal Palace/ Upper Norwood district town centre (8.0%)
Zone 9 – Lewisham*	Crystal Palace/ Upper Norwood district town centre (11.0%)	Central London/ West End (7.0%)	Beckenham district town centre (6.4%)

**zone falls partly within LBB   Source: Household survey results*

14.5 As previously stated, visiting restaurants is the most popular commercial leisure activity for residents in the survey area, with 68% of respondents stating that they participate in this type of activity. Accounting for 9.9% of the overall market share, Central London/ West End is the most popular destination for this type of activity. As identified in the previous 'health check assessments', the vast majority of centres that are situated in the London Borough of Bromley benefit from good connections to Central London.

14.6 In addition, zones included in the wider survey area, particularly in the northern section, closer to Central London including zone 9 (Lewisham) and zone 10 (Sidcup & Bexley) are also well connected to Central London through national rail services. Taking this into account, it can be expected that Central London/ West End would be a popular destination for dining at restaurants, given the concentration of such uses commuting patterns to the area and further linked trips to other leisure uses.

14.7 Bromley town centre is the second most popular destination, accounting for 7.8% of the total market share and 35.9% of its local zone (zone 1) on account of its relatively good range of restaurants including several national restaurant chains such as Pizza Express, Nando's, Franco Manca and Zizzi. Bromley town centre also draws trade from surrounding zones, including 13.0% of zone 3 and 4.2% of zone 4, however, given the relative proximity to zone 2, a market share of 5.4% from this zone is less than expected.

14.8 Similar to Bromley town centre, Beckenham is also well represented in terms of national restaurant chains which is reflected in it being the second most popular destination for such uses within zone 1, comprising 11.7% of the market share. There is likely to be an element of competition for spend between Bromley and Beckenham town centres given their proximity and overlapping catchment and without this competition both centres' respective market shares would likely be higher.

14.9 The third most popular destination for restaurants is Chislehurst local centre which comprises 4.3% of the total market share of the survey area. Whilst Chislehurst contains several nationally operated restaurant chains and upmarket independent restaurants, the centre is clearly outperforming its role as a local centre, accounting for 28.1% of the market share within its local zone (zone 2) compared to Orpington, a defined major town centre which accounts for 16.5%. The disparity between the two centres may be a consequence of the more upmarket offer and wider choice which is provided within Chislehurst, where the overall offer / appeal of the centre is arguably stronger

14.10 Regarding zone 3 (Biggin Hill), the most popular destination for dining at restaurants is Orpington town centre accounting for 21.4% of the local market share. Locksbottom local centre comprises 13.8%, followed by Bromley town centre which accounts for 13.0%. Biggin Hill local centre, standing at 12.1% of zone 3 is not the most popular destination within its local zone despite being the main centre within the zone, suggesting there may be scope to improve provision of this nature within the centre.

14.11 In terms of other strongly performing locations within the restaurant sector, Crystal Palace/ Upper Norwood district town centre accounts for 11.0% of zone 9, outperforming Lewisham town centre which comprises 4.7% of zone 9. Crystal Palace/Upper Norwood also sees good representation in its local zone (zone 8) accounting for 8.0%. It was identified within the 'health check' assessment for Crystal Palace/ Upper Norwood that the district centre lacks representation from national restaurant chains but has a strong independent offer, and these market shares indicate that the strength of the independent offer is in itself an important attractor of the centre.

Visits to cafes

Table 14.2 Patterns of visits to cafes

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Bromley town centre (11.5%)	Crystal Palace / Upper Norwood town centre (5.8%)	Orpington town centre (4.4%)
Zone 1 – Bromley MTC & Beckenham	Bromley town centre (39.8%)	Hayes local centre (7.6%)	Beckenham town centre (6.4%)
Zone 2 – Orpington	Orpington town centre (29.9%)	Chislehurst local centre (19.1%)	Petts Wood town centre (14.0%)
Zone 3 – Biggin Hill	Orpington town centre (23.9%)	Biggin Hill local centre (16.2%)	Locksbottom local centre (11.2%)
Zone 8 – Croydon*	Crystal Palace / Upper Norwood town centre (13.8%)	Beckenham town centre (9.7%)	Croydon town centre (9.0%)
Zone 9 – Lewisham*	Crystal Palace/ Upper Norwood town centre (15.0%)	Bromley town centre (13.2%)	Hither Green/City of London & Shoreditch (4.7%)

**zone falls partly within LBB   Source: Household survey results*

14.12 59% of respondents of the survey stated that visit cafes, indicating the importance of centres that provide a wide range of these types of facilities which support the principal shopping function of a centre. The centre within the Borough which sees the most visits to cafes is Bromley town centre, accounting for 11.5% of the total market share across the survey area. Bromley town centre accounts for 39.8% of the market share from its local zone (zone 1) and a 13.2% market share from zone 9, but the centre does not have any significant influence as a destination for this type of leisure activity beyond this.

14.13 In terms of other centres in zone 1, Hayes local centre comprises 7.6% of the local market share, marginally outcompeting Beckenham district town centre which accounts for 6.4%. Whilst Beckenham is larger and has a greater quantum of cafes, it is possible that the presence of Hayes railway station located centrally with centre likely results in linked trips to cafes for commuters.

14.14 For respondents within zone 2, Orpington town centre is the most popular destination for visiting cafes, accounting for 29.9% of the local market share, followed by Chislehurst local centre (19.1%) and Petts Wood town centre (11.2%). Likewise, Orpington town centre is also the most popular destination for visiting cafes for respondents from zone 3, accounting for 16.2% of the market share. Similar to zone 2, whilst Orpington town centre plays a leading role in terms of trips to cafes, but respondents from zone 3 also opted to go to smaller centres including Biggin Hill local centre (16.2%) and Locksbottom local centre (11.2%). As previously identified, Orpington town centre contains a range of both independent and national coffee shops chains which likely drives the high proportion of market share within zones 2 and 3 and the reason why it is second most popular destination for visiting cafes in the overall survey area.

14.15 Crystal Palace/Upper Norwood district town centre attracts an overall market share of 5.8%, comprising the most popular destination for visiting cafes in zone 8 (13.8%) and zone 9 (15.0%). As previously identified, the district town centre has a particularly strong 'café culture', benefiting from a range of independent coffee shops including Roasted Bean, Four Boroughs, Blackbird and Etude Coffee.

Cinemas

Table 14.3 Patterns of visits to cinemas

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Vue, Bromley (15.4%)	Vue, Eltham (8.11%)	Vue, Valley Park Leisure Centre Croydon (7.0%)
Zone 1 – Bromley MTC & Beckenham	Vue, Bromley (50.2%)	Odeon, Beckenham (11.2%)	Bromley Picturehouse** (10.1%)
Zone 2 – Orpington	Odeon, Orpington (33.5%)	Vue, Bromley (33.1%)	Showcase Cinema de Lux, Bluewater (11.4%)
Zone 3 – Biggin Hill	Odeon, Orpington (31.8%)	Vue, Bromley (31.3%)	Showcase Cinema de Lux, Bluewater (11.1%)
Zone 8 – Croydon*	Vue, Valley Park Leisure Centre, Croydon (23.3%)	Odeon, Streatham (12.2%)	Vue, Grants Entertainment Centre, Croydon (11.5%)
Zone 9 – Lewisham*	Everyman, Crystal Palace (16.7%)	Greenwich Picturehouse (10.3%)	Vue, Eltham (9.4%)

**zone falls partly within LBB   Source: Household survey results   **following the household survey being undertaken, it was confirmed by the operator that this venue would close in August 2024.*

14.16 49% of residents in the survey area visit cinemas. The most popular cinema within the survey area is **Vue, St Mark's Square** which is situated in the southern portion of Bromley town centre. The 9 screen cinema accounts for 15.4% of cinema trips in the overall survey area, including accounting for over 50% (50.2%) of the market share from its local zone, zone 1, as well as 33.1% of zone 2, 31.3% of zone 3, 7.4% of zone 4 and 7.0% of zone 7. The cinema which opened in 2018, is part of St Mark's Square, a mixed use development which comprises residential apartments, a Premier Inn Hotel and ground floor commercial units. The development is supported by a 300 space underground car park which is open to visitors for a cost of £2.80 for a two hour stay. Anecdotally, it is considered that people that visit the cinema predominantly use this car park to access the complex as little footfall was observed surrounding St Mark's Square at the time of our visits to the centre.

14.17 The second most popular cinema within zone 1, accounting for 11.2% of the market share, is the **Odeon, Beckenham,** although the catchment of this cinema does not extend beyond its local zone. Qualitatively this cinema is one of the more dated in the Borough, both externally and internally, and would benefit from investment to improve its attractiveness.

14.18 In terms of other provision, the **Odeon cinema in Orpington** town centre is the most popular venue for respondents within its local zone (33.5% of zone 2), as well as zone 3 (31.8%) and zone 5 (26.8%); these can be considered strong market shares and evidence that the cinema draws trade from a relatively wide catchment. Compared to the company's Beckenham cinema the Orpington one benefits from a more modern, contemporary appearance which may contribute to its attractiveness.

14.19 Turning elsewhere, the second most popular cinema within survey area as a whole in terms of market share is Vue, Eltham High Street, comprising 8.1% of cinema trips. The fact that the second-highest market share for the survey area is just 8.1% is reflective of the fact that there are a large range of facilities for residents in the survey area to visit, i.e. a good level of consumer choice, and therefore aside from the Vue in Bromley no individual cinema draws trade from a particularly wide catchment. In the case of the Vue in Eltham, it having the second-highest overall market share is largely driven by a strong performance from its local zone (zone 10), from where it captures 33.9% of the market share. It does not draw significant trade from zones located in LBB (0% from zones 1 & 3, and 3.4% of zone 2), indicating that the cinema is not in direct competition with the aforementioned cinemas within LBB.

14.20 Similarly, the third most frequently visited cinema within the survey area is Vue, Valley Park Leisure Centre Croydon which accounts for 7.0% of cinema trips from the survey area as a whole, including 36.1% of zone 7 and 23.5% of zone 8. Again, it is not considered that this cinema is in direct competition from cinemas found in Bromley Borough, accounting for 1.8% of zone 1 and 0% of zones 2 and 3.

14.21 The Showcase Cinema de Lux found in Bluewater Shopping Centre is the fourth most popular cinema, comprising 6.9% of cinema trips within the survey area. The shopping centre is located outside of the survey area but benefits from good connections to the M25 and the A2, allowing for easy access across the south east region. The 17 screen cinema accounts for 45.7% of the market share of zone 4, 25.4% of zone 5, 16.2% of zone 10, and does also have an influence over residents in the eastern and southern parts of LBB, drawing an 11.4% market share from zone 2 (Orpington) and 11.1% market share from zone 3 (Biggin Hill); it is the third most popular cinema destination for residents in both of these zones.

Bromley Picturehouse

14.22 **Bromley Picturehouse,** located in the northern section of Bromley town centre, comprises 10.1% of cinema visits from residents in zone 1, but draws a strong market share. Whilst the independent cinema draws some trade from surrounding zones (9.0% of zone 2 and 5.3% of zone 3), it is considered that the venue is underperforming in terms of its market share, particularly having regard to the lack of alternative cinema provision serving the residential areas to the north of Bromley.

14.23 However, in respect of the cinema's underperformance in market share, we are of this view that this may be to do with the cinema's location within the town centre; it is slightly 'off pitch' in relation to the rest of the retail and food & beverage offer in the town centre (albeit only a few minutes' walk away), and is on the periphery of the commercial offer of the centre as a whole. Clearly, the same comments could also be applied to the Vue at St Marks, and it may be that the differentiator is the availability of directly adjacent car parking to the Vue, range of film options, or customer price perception (even though the two venues do offer similar prices).

14.24 Indeed, it was announced in June 2024 that Bromley Picturehouse will permanently close in August 2024, meaning that overall offer within Bromley town centre has been reduced to the Vue cinema within St Mark's Square. Picturehouse are also closing two other cinemas in London (Fulham Road and Stratford) at the same time. The reason's for Picturehouse's decision to close the cinema has not been made public. The future of the Picturehouse site is unknown at the time of preparation of this study, and it might be that agreement can be made with an alternative operator to run the venue, and the Council should seek to lend support where possible to ensure the site is able to continue support the arts and culture offer of the Borough. Of note is that the closure of the Picturehouse leaves the Borough without an 'arthouse' cinema, with the exception of the Everyman cinema at the periphery of the Borough in Crystal Palace district centre.

Pubs & bars

Table 14.4 Patterns of visits to pubs & bars

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Bromley town centre (8.2%)	Central London / West End (7.4%)	Crysal Palace/ Upper Norwood (5.3%)
Zone 1 – Bromley MTC & Beckenham	Bromley town centre (29.5%)	Crysal Palace/ Upper Norwood district town centre (13.2%)	Beckenham district town centre (9.0%)
Zone 2 – Orpington	Chislehurst local centre (22.5%)	Central London / West End (13.8%)	Orpington town centre (12.5%)
Zone 3 – Biggin Hill	Locksbottom local centre (14.9%)	Biggin Hill local centre (14.1%)	Farnborough village neighbourhood centre (8.7%)
Zone 8 – Croydon*	Croydon town centre (18.5%)	Crysal Palace/ Upper Norwood (13.0%)	Streatham town centre (6.1%)
Zone 9 – Lewisham*	Crysal Palace/ Upper Norwood (8.3%)	Lewisham town centre (7.5%)	Forest Hill/Penge (5.2%)

**zone falls partly within LBB   Source: Household survey*

14.25 Almost half of respondents to the household survey (46%) stated that they visit pubs and bars. Bromley town centre is the most popular destination within the survey area, accounting for 8.2% of the overall market share. However, the fact that the most popular location only attracts a survey area-wide market share of 8.2% confirms that this type of activity is generally localised and people do not travel significant distances to visit a particular location.

14.26 Bromley town centre accounts for 29.5% of its local zone (zone 1) market share, 11.0% of zone 2 and 8.2% of zone 3. The town centre also draws some limited market share from further afield, including a market share of 6.9% of zone 4 (Swanley), 5.2% of zone 9 (Lewisham) and 8.4% of zone 10 (Sidcup & Bexley), however these are relatively low percentages, and suggests that the core catchment of Bromley does not extend much beyond its local area and the town centre does not draw much market share from beyond its local zone. Reflecting the trends seen in other eating/drinking leisure categories, Central London/West End is the second most popular destination for visiting pubs/bars, accounting for 7.4% of the overall market share as well as 13.8% of zone 2 and 6.6% of zone 1.

14.27 The third most popular destination for visiting pubs/bars is Crystal Palace/ Upper Norwood local centre, which attracts 5.3% of trips within the survey area as a whole, including 13.0% from its local zone (zone 8) and 13.2% from zone 1. The local centre also accounts for 8.3% of zone 9, a greater share than the considerably larger Lewisham town centre which comprises 7.5% of zone 9. As previously identified, the town centre has an extensive independent food & beverage offer which is reflected in the numbers of visits to pubs/bars within the centre from respondents within the survey area. Bars and pubs have also been identified as a prevalent use within Beckenham, it is interesting to consider that the centre does not have the same reach as Crystal Palace/Upper Norwood, accounting for 9.0% of its local zone (zone 1), 1.2% from zone 8 and 2.4% from zone 10. It may be the case that Beckenham is impacted by its proximity to Bromley town centre, whereas Crystal Palace is more isolated from larger town centres and has more of its own distinct catchment.

14.28 Chislehurst local centre accounts for 22.5% of the market share of its local zone (zone 2) in addition to 5.1% of zone 1 and 8.0% of zone 10, which represents a particularly strong performance in respect of the market share captured from its local zone. It should be noted that in addition to the offer in the local centre itself, that four pubs are found to the south of the local centre, within the Royal Parade neighbourhood centre. and it is likely the case that respondents considered these establishments to be a part of the town centre, which in turn may help explain its strong market share.

14.29 The third most popular destination for respondents from zone 2 to visit pubs/ bars is Orpington town centre, accounting for 12.5% of the local market share. The town centre also accounts for 2.5% of zone 3 and 4.2% of zone 10. Whilst the centre does contain the Orpington GPO, a high-end bar/kitchen, it does not provide an offer as extensive as that of Chislehurst and as consequence attracts generally lower market shares.

14.30 In terms of zone 3, Locksbottom comprises 14.9% of the market share, on account of historic pubs such as the British Queen, Ye Olde Whyte Lyon and the Black Horse in the local centre which together form a cluster which may act as a destination. Biggin Hill local centre closely follows, accounting for 14.1% whilst Farnborough local centre accounts for 8.7%.

Arts & culture

14.31 40% of residents in the survey area visit arts & cultural venues such theatres, museums, exhibitions and art galleries. As would be expected, the world-class offer which Central London provides in respect of this type of cultural activity means that it is overwhelmingly the most popular choice for residents in the survey area, accounting for 60.6% of the market share for this leisure category. Likewise, North Greenwich which includes the o2 Arena, provides a plethora of live music events and is the third most popular destination, comprising 2.2% of the market share of the overall survey area.

14.32 In terms of local venues found within the survey area, the main cultural offer in this category is the **Churchill Theatre** located within Bromley town centre attracts 5.2% of the overall market share from the survey area and is most popular stand-alone venue in zones 1 (1.5%), 2 (10.0%), 3 (16.0%) and 8 (4.8%). The 785 seat venue performing arts venue provides a range both touring theatre productions as well amateur productions that are organised by local residents and unquestionably makes a significant contribution to the overall cultural offer of the Borough. The market share attracted to the Churchill Theatre from each of the survey zones is shown in **Table 14.5.**

Table 14.5 Patterns of visits to arts & culture venues in Bromley town centre

	Churchill Theatre, Bromley	Little Theatre, Bromley	Bromley town centre (general)	Combined market share
Zone 1	1.5%	0.0%	9.1%	10.6%
Zone 2	10.0%	0.0%	3.9%	13.9%
Zone 3	16.0%	0.0%	6.7%	22.7%
Zone 4	3.11%	0.0%	0.0%	3.1%
Zone 5	10.4%	0.0%	0.0%	10.4%
Zone 6	6.0%	0.0%	0.0%	6.0%
Zone 7	7.1%	0.8%	0.0%	7.9%
Zone 8	4.8%	0.0%	0.0%	4.8%
Zone 9	1.0%	0.0%	0.0%	1.0%

**zone falls partly within LBB   Source: Household survey. Please note, the figure for 'Bromley town centre (general)' is those respondents who did not specify a particular venue within the town centre. It is therefore possible that some of the market shares identified in this column can also be attributed to the specific venues listed in the columns to the left, which is why a "combined market share" is presented in the table.*

14.33 The Churchill Theatre was constructed in the 1970s and it is understood that LBB have recently put the ownership of the theatre out to tender. It is currently operated by Trafalgar Entertainment. The invitation to tender is interrelated to the long term future of the site, with the current facility understood to be entering the end of its operational life. A press release issued by LBB in March 2024 stated that:

> *A council spokesman said: "Whilst discussions remain ongoing with the theatre's current operators Trafalgar Group, the council is also going out to market to invite additional expressions of interest, to secure the future of the theatre, in line with its statutory duty to obtain best value for Council Tax payers money, prior to reaching a final decision."*
>
> *This follows confirmation last year that the theatre, which was constructed in the 1970s and is now rapidly approaching the end of its life, needs to be replaced, providing the council with an exciting opportunity to secure a new and upgraded theatre, as well as enabling the relocation of Bromley's Central Library to a more prominent location on street at the vacant Top Shop premises slightly nearer to Market Square.*

14.34 Our understanding is therefore that it is the intention for the Theatre to remain in situ in the town centre and indeed as the only venue which is identified as attracting significant 'market share' in respect of this type of leisure activity it is considered that the retention of the Theatre is significant in considering the long term vitality of the town centre, and particularly its evening economy. In September 2024, LBB approved to gift the Council's freehold interest in the Churchill Theatre to the existing tenant, Trafalgar Group which will enable long term investment into the building including necessary renovation works. Whilst the executive agreement is subject to the completion of a legal agreement, it is hoped that this process will secure the long-term operation of the theatre in Bromley town centre.

14.35 A second theatre is also located in Bromley town centre. The **Bromley Little Theatre** is located on North Street and provides a smaller theatre venue with a venue capacity of 108. Located on the site of a former bakery, there has been a theatre on the site of the Little Theatre since 1938. The theatre has not registered particularly high market shares in the household survey, but this is in our view likely to be an under-representation of local levels of patronage. Moreover, qualitatively the venue plays a significant role in the Borough's cultural offer, offering a venue for new plays and emerging talent, and the venue also runs its own youth theatre group.

Health & fitness facilities

Table 14.6 Patterns of visits to health & fitness facilities

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Bromley town centre (3.9%)	Forest Hill Pools (3.0%)	Dulwich College Sports Club (2.8%)
Zone 1 – Bromley MTC & Beckenham	Bromley town centre (15.8%)	The Spa by Mytime Active, Beckenham (14.1%)	Virgin Active, Bickley (7.2%)
Zone 2 – Orpington	David Lloyd, Sidcup (10.0%)	Nuffield, Sidcup/ Virgin Active, Bickley (9.8%)	Pure Gym, The Walnuts Centre, Orpington (4.2%)
Zone 3 – Biggin Hill	Orpington town centre (19.5%)	Biggin Hill local centre (16.6%)	Pavilion Leisure Centre (11.0%)
Zone 8 – Croydon*	Thornton Heath town centre (16.1%)	Crystal Palace National Sports Centre (11.2%)	Bromley town centre (9.8%)
Zone 9 – Lewisham*	Forest Hill Pools (11.5%)	Dulwich College Sports Club (8.5%)	Sydenham town centre (7.3%)

**zone falls partly within LBB* *Source: Household survey*

14.36 Usage of health and fitness facilities across the survey area is relatively low compared to other types of commercial leisure activity, with 29% of respondents stating they use these facilities. Access to health and fitness facilities is not, generally, something which people seek to travel distances in order to partake, and this is reflected by the fact that no single centre or destination attracts a significant survey area-wide market share.

14.37 Bromley town centre secures a market share of 15.8% from residents in its local zone, zone 1, and also draws a 9.8% market share from zone 8. The town centre hosts a number of gyms including a gym within the Pavilion Leisure Centre adjacent to the Glades Shopping Centre as well an Anytime Fitness, Pure Gym and the Bromley Fitness Centre. In this regard, it is considered that the town centre provides a good range of health & fitness clubs for local residents. Elsewhere, The Spa by Mytime Active in Beckenham (run by Mytime Active on behalf of LBB) is a popular facility within zone 1, accounting for 14.1% of the local market share and includes a gym, two swimming pools and a children's soft play area.

14.39 Turning to zone 3, Orpington town centre attracts good levels of market share from the zone; the most popular destination for attending health/fitness facilities, comprising 19.5% of the market share and contains the Walnuts Leisure Centre in addition to a Pure Gym and Anytime Fitness. The town centre is closely followed by Biggin

Hill local centre, accounting for 16.6% of zone 3, with Biggin Hill Swimming Pool found in close proximity to the designated local centre.

14.40 Elsewhere in the survey area, individual venues such Crystal Palace National Sports Centre which accounts for 11.2% of zone 8 and Forest Hill Pools which accounts for 11.5% of zone 9, are popular venues for residents in their surrounding localities. The Crystal Palace National Sports Centre is to be subject of a programme of significant investment, largely as a result of funding from the Mayor of London, which will upgrade the swimming facilities, upgrading fitness facilities, reopening indoor climbing facilities, and repairing the outdoor athletics track.

14.41 The proposals represent a significant investment in the centre which has fallen into a state of needing significant repair and upgrading for a number of years; the significant nature of the investment means it could be the end of the decade before upgrade works are completed, but there is evidently clear scope for residents in the northern part of the Borough to benefit from access to these once complete.

Entertainment venues

Table 14.7 Patterns of visits to entertainment venues

	Most popular destination	2nd-most popular destination	3rd-most popular destination
Overall survey area	Tenpin, Bexleyheath (8.1%)	Tenpin, Croydon (7.9%)	Central London/West End (6.4%)
Zone 1 – Bromley MTC & Beckenham	Bromley town centre (25.7%)	Pavillion Leisure Centre , Bromley (20.9%)	Central London/West End (12.3%)
Zone 2 – Orpington	Bromley town centre (20.8%)	Bexleyheath town centre (12.7%)	Central London/ West End (11.5%)
Zone 3 – Biggin Hill	Orpington town centre (20.9%)	Bromley town centre (11.0%)	Blocfit, Brixton (8.6%)
Zone 8 – Croydon*	Tenpin, Croydon (34.1%)	Mecca Bingo, Croydon (8.6%)	Mecca Bingo, Eltham (6.2%)
Zone 9 – Lewisham*	The Pavilion, Bromley (11.7%)	Lewisham Lanes, Lewisham (8.1%)	North Greenwich (including o2) (7.1%)

**zone falls partly within LBB   Source: Household survey*

14.42 26% of residents in the survey area visit ‘entertainment venues’, the lowest proportion of any of the types of leisure activity surveyed in the household telephone survey. ‘Entertainment venues’ is the umbrella term given to facilities such as indoor bowling, trampolining, laser quest, indoor karting, and newer types of facilities which have emerged in recent years which are often located in town centres such as escape rooms and indoor golf. Bowling is the most popular type of activity across the survey areas a whole, accounting for the two most visited venues in the in survey area; Tenpin Bexleyheath (8.1%) and Tenpin Croydon (7.9%). Whilst not at the same proportion of representation seen in trips to cultural facilities, Central London is also a popular destination, accounting for 6.4% of trips to entertainment facilities from the survey area as a whole.

14.43 In terms of town centres that are found within the survey area, Bromley town centre is the most popular destination for visiting entertainment facilities, including 25.7% of its local zone (zone 1), 20.8% of zone 2 and 11.0% of zone 3. As shown in Table 14.8, the collective figure for Bromley town centre equates to 46.6% of zone 1, much of this market share can be attributed to the Pavilion Leisure Centre. The Pavilion Leisure Centre is also found in Bromley town centre, containing a children's play area and bowling alley which in its own right comprises 20% of the market share of zone 1 as well having the largest market share in zone 9, accounting for 11.7%. Rhino Boulder, a recently opened rocking climbing gym that is situated within Bromley town centre, does not currently account of for any entertainment related trips, but it can be expected that the facility will form an important part of Bromley's leisure offer as the venue becomes more established.

Table 14.8 Combined market share data for entertainment venues in Bromley town centre

	Overall market share	Zone 1	Zone 2	Zone 3	Zone 8	Zone 9
BTC	5.4%	25.7%	20.8%	11.0%	0.0%	0.0%
MERKUR Slots, High Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rhino Boulder, The Mall	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pavilion Leisure Centre	6.3%	20.9%	4.5%	0.0%	0.0%	11.9%
Combined market share	11.7%	46.6%	25.3%	11.0%	0.0%	11.9%

Source: household survey results.

14.44 In zone 2, bowling facilities are the most popular venues with Tenpin Bexleyheath comprising 12.7% and Tenpin Croydon representing 7.1%. In contrast Orpington town centre accounts for 0% of zone 2, whilst respondents opting to travel to town centres further afield including Bromley and Bexleyheath. Positively, Orpington town centre is the leading destination for entertainment venues in zone 3, accounting 20% of the local market share.

14.45 In zone 8, Ten Pin Croydon is the most popular venue, accounting for 34.1% of the local market share, followed by two Mecca Bingo venues. Mecca Bingo Eltham accounts for 6.2% of zone 8, however there are plans to redevelop the site to provide a new Lidl store. An application for the scheme is yet to be submitted and the venue is still in operation.

Leisure catchment identification

14.46 Drawing together the above analysis, in the next section of this report we identify the extent of the leisure catchments for the Borough's main centres. To do this, we have identified a 'primary', 'secondary' and 'tertiary' catchment area for each centre, based on each type of commercial leisure activity, based on the following definitions[58]:

Definition	Market share from household survey (colour shading also applies to Tables 14.9 to 14.16 below)
Primary catchment	30%+
Secondary catchment	10-29.9%
Tertiary catchment	5-9.9%

[58] The colour shading applied to the primary, secondary and tertiary catchments in the table this paragraph is also applicable to the subsequent Tables 14.9-14.16.

Bromley town centre

14.47 **Table 14.9** shows that Bromley town's centre 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[59]. These findings amplify the need for the cinema provision in the centre to be better integrated with the wider retail and commercial offer of the centre in order to enable other sectors in the town centre to capitalise on this. 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.

14.48 The 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.

14.49 Likewise, it would also be expected that the town centre would achieve greater levels of representation in the pub/bar sector, albeit consumers generally go to local venues for such uses. As previously mentioned, Bromley town centre is well provided for in terms of health and fitness clubs which reflected in the centre achieving a secondary catchment across zone 1-3.

Table 14.9 Bromley town centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	35.9%	5.4%	13.0%	4.2%	0.0%	1.3%	0.0%	2.7%	2.2%	5.9%
Cafes	39.8%	8.5%	6.9%	0.9%	0.7%	0.0%	2.3%	6.1%	13.2%	2.5%
Cinemas	60.3%	42.1%	36.6%	7.4%	2.7%	6.2%	20.6%	9.1%	9.2%	6.1%
Pubs/bars	29.5%	11.0%	8.2%	6.9%	0.0%	0.0%	2.3%	0.0%	5.2%	8.4%
Arts/cultural facilities	9.1%	3.9%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Health & fitness clubs	15.8%	8.5%	11.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Entertainment venues	25.7%	20.8%	11.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Orpington Town Centre

14.50 As seen in **Table 14.10**, 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.

14.51 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

[59] Figures include Picturehouse Bromley, which has now closed.

extensive offer in either of these sectors. As previously identified, 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, although the proposed refurbishments to the Walnuts Leisure Centre may assist with this.

Table 14.10 Orpington town centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	1.4%	16.5%	21.4%	1.4%	1.4%	0.0%	0.0%	0.0%	0.0%	0.5%
Cafes	2.0%	29.9%	23.9%	1.9%	3.9%	0.0%	0.0%	0.0%	0.0%	1.8%
Cinemas	0.0%	33.5%	31.8%	7.3%	26.8%	1.0%	0.0%	0.0%	0.0%	0.0%
Pubs/bars	0.0%	12.5%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%
Arts/cultural facilities	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	6.1%	6.9%	19.5%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	20.9%	2.3%	4.4%	0.0%	0.0%	0.0%	0.0%	6.5%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Beckenham district centre

14.52 As shown in **Table 14.11**, Beckenham town 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.

14.53 In terms of surrounding zones, the district centre draws trade from respondents from zone 8 for café and restaurant uses but only equates to a tertiary catchment for both leisure types. In addition, the Odeon Cinema l located within the town centre draws limited trade from respondents from zones 7 and 9, comprising a tertiary catchment for both zones. The centre does not attract significant market shares in the remaining sectors due to a lack of facilities of this nature within the centre.

Table 14.11 Beckenham district centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	9.7%	3.8%	2.3%
Cafes	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	9.7%	3.8%	2.3%
Cinemas	11.2%	0.0%	1.1%	0.0%	0.0%	2.7%	7.0%	1.1%	6.9%	0.0%
Pubs/bars	9.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	2.4%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	1.2%	4.5%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Crystal Palace district centre

14.54 As shown in **Table 14.12**, the representation of Crystal Palace district town 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.

14.55 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.

Table 14.12 Crystal Palace district centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	11.0%	0.0%
Cafes	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	13.8%	15.0%	0.0%
Cinemas	6.6%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	10.5%	16.7%	0.0%
Pubs/bars	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	8.3%	0.0%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%

Source: household survey results. Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Penge district centre

14.56 As shown in **Table 14.13**, Penge town 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.

Table 14.13 Penge district centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Cafes	2.64%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cinemas	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Pubs/bars	0.0%	0.7%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Petts Wood district centre

14.57 As shown in **Table 14.14**, Penge town 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. There are also pubs situated prominently within the centre, with the Daylight Inn acting as a focal point on the eastern side of the centre. The centre does not attract significant market shares in the remaining sectors due to a lack of facilities of this nature within the centre.

Table 14.14 Petts Wood district centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	2.8%	11.2%	2.6%	0.0%	1.8%	0.6%	0.0%	4.4%	0.0%	0.0%
Cafes	4.2%	14.0%	3.7%	0.0%	4.6%	0.0%	0.0%	2.8%	0.0%	0.0%
Cinemas	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Pubs/bars	0.8%	10.3%	3.1%	0.0%	1.1%	0.0%	0.0%	4.1%	0.0%	0.0%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

West Wickham district centre

14.58 As shown in **Table 14.15**, West Wickham 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. The centre does not attract significant market shares in the remaining sectors due to a lack of facilities of this nature within the centre.

Table 14.15 West Wickham district centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	3.9%	0.5%	0.8%	0.0%	0.0%	0.0%	10.9%	4.1%	0.0%	0.0%
Cafes	2.6%	0.0%	5.1%	0.0%	0.7%	0.0%	11.9%	5.5%	0.0%	0.0%
Cinemas	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Pubs/bars	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	1.2%	0.0%	0.0%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Health & fitness clubs	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	1.8%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Chislehurst Local Centre

14.59 As shown in **Table 14.16**, 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.

14.60 As mentioned previously, it is important to caveat that it is likely the case that respondents included in this study considered the Royal Parade neighbourhood centre as a part of the town centre The neighbourhood centre contains a range of restaurants and a number of pubs are found in close proximity, therefore there is scope that the data for the local centre is less than what was recorded, in terms of trips to restaurants and bars/pubs. However, even taking this into account, the performance of the centre in respect of the market share it attracts can be considered impressive.

Table 14.16 Chislehurst local centre leisure catchment analysis

Leisure Activity	Zones									
	1	2	3	4	5	6	7	8	9	10
Restaurants	1.4%	28.1%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	2.7%	7.4%
Cafes	1.5%	19.1%	0.8%	0.9%	4.6%	0.0%	0.0%	0.0%	1.7%	10.2%
Cinemas	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Pubs/bars	5.1%	22.5%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.8%	8.0%
Arts/cultural facilities	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Health & fitness clubs	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Entertainment venues	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: household survey results. Colour shading reflects primary, secondary and tertiary catchments of centre – see paragraph 14.46.

Expenditure growth in the commercial leisure sector

14.61 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.

14.62 Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:

- 'Cultural services' – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix. Spending on this type of leisure service ranges from £393 per person, per annum (zone 8) to £550 per person, per annum (zone 6) (at 2022). The average per capita spend across the survey area is £458 (at 2022).
- 'Recreation and sporting services' – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs. Spending on this type of leisure service ranges from £256 per person, per annum (zone 4) to £430 per person, per annum (zone 3) (at 2022). The average per capita spend across the survey area is £349 (at 2022).
- 'Restaurants and cafes' – this includes spending in both restaurants and cafes, and also includes spending on 'alcoholic drinks consumed outside the home' (i.e. in pubs and bars) and on take-aways. Spending on this type of leisure service accounts for the majority of residents' commercial leisure spend, ranging from £1,715 per annum (zone 4) to £2,316 per annum (zone 6) (at 2021). The average per capita spend across the survey area is £1,978 (at 2022).

14.63 Per capita spending on commercial leisure has been subject to significant fluctuation in recent years, on account of spending being impacted by Covid-19 and associated lockdowns and restrictions on indoor dining/meeting. Experian forecast (Retail Planner Briefing Note 21 (RP21)) that per capita spend on commercial leisure dropped by 35.8% between 2020 and 2021 for example, but has subsequently 'bounced back' with a growth in per capita spend of 28.6% between 2021-22 and 21.3% between 2022-23. Such levels of growth largely correct the scaling back in spending which occurred during the pandemic and moving forwards growth in leisure spending is expected to be much more regularised. RP21 forecasts growth in spending of +0.6% from 2025-26, increasing to +1.1% per annum from 2026-2030 before settling back slightly to +0.8% per annum from 2030 onwards.

14.64 By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian's population projections for the survey area, the total 'pot' of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 14.17** for the periods 2024-34 and 2023-41. As with the retail capacity forecasts, we advise that figures beyond 2034 are considered as indicative. Full tabulations for each of the commercial leisure sectors are set out Tables L4a to L4d of **Appendix 3.**

Table 14.17 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. Figures for 2041 are indicative. Please note, figures are cumulative.

14.65 Overall, Table 14.17 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.

14.66 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.

Scenario testing – GLA Population Projections

14.67 As with the quantitative retail need analysis in the previous two sections, we have also run an additional 'scenario test' which models the expenditure growth arising when utilising the housing trajectory-led population projections which have been produced by the Greater London Authority rather than the Experian population projections which have been used as the 'baseline' analysis for the study. The methodological approach behind calculating these projections is set out at paragraphs 12.50 to 12.52 of Section 12 of this study.

14.68 Table 14.18 shows the extent of growth in the commercial leisure sector arising utilising the GLA scenario. It shows that under the GLA scenarios there will be an increase in total leisure spend across the survey area, amounting to, overall, an additional £11.3m over the period to 2034, and indicatively an additional £12.7m by 2041. As set out in Section 12, this growth is driven by parts of the survey area, particularly those zones which fall within LB Croydon, having higher levels of population growth under the GLA scenario than the Experian scenario. Whilst for retail needs figures it is appropriate to focus on needs arising at the Borough level, because residents often are willing to travel further for commercial leisure activities, a wider consideration of survey area-wide levels of growth can be considered appropriate.

Table 14.18 Expenditure growth in key commercial leisure categories, comparison between baseline and GLA population growth scenarios

Sector		Expenditure growth in survey area, 2024-34 (£m)	Expenditure growth in survey area, 2024-41 (£m, indicative)
Cultural services	Baseline	+73.8	+131.9
	GLA	+76.3	+135.1
Recreation & sporting services	Baseline	+57.6	+102.9
	GLA	+59.4	+105.0
Restaurants and cafes	Baseline	+340.2	+607.9
	GLA	+347.3	+615.4
Total	Baseline	+471.7	+842.8
	GLA	+483.0	+855.5

Source: Table L4d, Appendix 3. Figures for 2041 are indicative. Please note, figures are cumulative.

SECTION 15 | STRATEGIC RECOMMENDATIONS & CONCLUSIONS

15.1 In this final section of the report, informed by the findings of the detailed analysis set out in the previous sections of our study, we set out a series of strategic recommendations which the Council may wish to have regard to in the preparation of a new Local Plan for the Borough. The recommendations are firstly set out on a Borough-wide basis, before key recommendations for each centre are identified.

15.2 Broadly, the 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.**

Use Class Order Changes & Permitted Development Rights

15.3 The changes to the Use Class Order which have come into effect since the Council's previous study have implications for the future and role and function of the Borough's town centres. The introduction of Use Class E, together with new further new Use Classes F1 and F2, are designed to allow for a greater range of flexibility in the range of uses which can be accommodated within town centres without requiring planning permission.

15.4 In our view, in the context of the role and function of the Borough's town centres this can be considered a positive development, as it promotes diverse town centres, leaving them better placed to withstand the changes which have taken place in the retail sector in recent years. As this study has identified, the retail sector has seen an increasing move online over the course of the last decade, particularly for non-food retail, which has in turn reduced demand for physical retail floorspace. In the Borough, levels of online shopping for comparison goods are significantly higher than the UK average. Aligned with the above trends, recent years have seen a number of high-profile national retailers enter administration, which has left larger-footprint vacant units in town centres at all levels of the retail hierarchy across the country; the Borough has not been immune from this with several large vacant units in Bromley town centre in particular remaining.

15.5 However, class E presents challenges as it is not geographically specific to town centres, meaning that out of town floorspace can also benefit from the additional flexibility, except in instances where there are historic controls on ranges of goods which can be sold. Whilst the Council will need to consider any applications for new retail and main town centre uses development outside of town centres on its merits, appropriate controls on ranges of goods should continue to be applied where necessary and justifiable, in order to protect the vitality and viability of the Borough's network of town centres.

15.6 Class E also presents something of a challenge when planning for future retail and town centre needs, as planning specifically for comparison and convenience goods floorspace could be considered to go 'against the spirit' of the flexibility sought by class E. However, the retail needs which this study has identify respond to specific identified deficiencies of provision spatially across the Borough, and on this basis it is appropriate to strategically plan for new floorspace on a goods basis, with appropriate controls in place to condition floorspace to the needs identified by the study.

15.7 A further development since the Council's last study has been the introduction of Permitted Development Rights which allows for the change of use from Class E properties to residential from August 2021, known as 'Class MA', subject to prior approval. These provisions were seen to provide wide-ranging opportunities for under-used or vacant town centre and strategic sites following the introduction of class E, and was intended by Government to support economic recovery, rejuvenate and diversify high streets through better use of vacant premises, and to encourage sustainable use of brownfield sites. LBB have put Article 4 Directions in place across their network of town centres to restrict the loss of class E floorspace for this purpose, although the extent of their operation was reduced following Secretary of State review. Nevertheless, the extent of coverage remains significant and means that these centres will retain a core retail/class E function moving forwards.

London Borough of Bromley-wide recommendations

Strategic approach

15.8 We set out the following recommendations for the general strategic approach to planning for retail and main town centre uses in the Borough over the new Local Plan period to 2041. In terms of the hierarchy of centres, our health check assessments have identified that each of the Borough's town, district and local centres are performing a role and function which reflects their current status, and accordingly we do not recommend any changes to centres at these levels. However, we do consider there may be scope for two neighbourhood centres to be taken forward as local centres in the Council's new Local Plan, as the presence of larger-format foodstores enables them to draw trade from wider than a neighbourhood catchment. The Council should also continue to monitor developments in key competing centres and locations surrounding the Borough such as Lewisham, Bell Green, Croydon (including Purley Way) and Bluewater as evidence from this study has shown them to exert an influence over shopping patterns of residents in the Borough.

Approach to planning for new retail development

LBB-01: The Council should have regard to the requirements of adopted national policy when developing its retail and town centre policies for the Borough. The NPPF directs the development of retail and other town centre uses towards town centres in the first instance, and for development outside town centres compliance with the sequential and impact 'tests' needs to be demonstrated. Any new applications for retail or other town centre uses on the edge of, or outside of, the defined town centres in the Borough should therefore demonstrate that there are no sequentially preferable sites available, and that no 'significant adverse' impacts will arise on existing defined centres based on the criteria set out in the NPPF.

LBB-02: All application for development of main town centre uses outside a defined town centre[60] of an existing town, district or local centre are required to demonstrate compliance with the sequential test, irrespective of the quantum of floorspace proposed. For the avoidance of doubt, this recommendation applies to proposals outside all levels of centre which fall under the definition of 'town centres' at Annex 2 of the NPPF (2024)[61].

LBB-03: The Council should continue to monitor application for major retail/main town centre uses development in centres surrounding the Borough, particularly if proposals are likely to impact on shopping and leisure patterns of residents in the Borough.

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[60] Annex 2 of the NPPF (2024) defines town centres as the "Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area". It is noted that the Council's current Local Plan does not define 'Primary Shopping Areas', and separate recommendations are made in respect of this point later in this section.

[61] Annex 2 of the NPPF (2024) confirms that "References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance."

Hierarchy of centres

LBB-04: The existing hierarchy of town centres in the Borough, as set out at paragraph 6.2.2 of the adopted Bromley Local Plan, is considered to remain fit for purpose as the basis of a hierarchy for future Local Plan reviews. For the avoidance of doubt, this is as follows:

• Metropolitan town centre – Bromley

• Major town centre – Orpington

• District centres – Beckenham, Crystal Palace, Penge, Petts Wood, West Wickham

• Local centres – Biggin Hill, Chislehurst, Hayes, Locksbottom, Mottingham, Green Street Green (High Street), Sundridge Park (Burnt Ash Lane)

• Neighbourhood centres & local shopping parades – please refer to separate recommendations below

LBB-05: The Council should define Primary Shopping Areas within each of the above centres, to reflect the current approach set out in the NPPF (2024). The Council may also wish to consider the other recommendations in respect of definition of town centre boundaries, and the application of Primary and Secondary Shopping Frontages in Bromley town centre, as set out in Table 15.2 of this report, however the application of Primary and Secondary Shopping Frontages is not mandatory under the wording of the current iteration of the NPPF (2024).

Retail & Leisure Impact assessment threshold

15.9 Our health check assessments have shown that whilst centres in the Borough are generally performing well, Bromley town centre has lost comparison goods 'market share' compared to the position at the time of the Council's last retail study and Orpington town centre faces significant challenges from out of centre retail to the north of its town centre. A tighter policy approach in respect of retail and leisure impact assessment thresholds will enable the Council to undertake a more detailed consideration of sequential and impact issues for applications for new retail floorspace in out of centre locations.

LBB-06: It is recommended that the Council adopt a local impact assessment threshold for its network of town centres, replacing the current 'blanket' approach of 2,500 sq.m for all centres, as set out at Policy 91 of the adopted Local Plan. We consider a threshold of 500 sq.m (gross) to represent an appropriate threshold in this regard. The threshold should be applied to applications for retail and leisure development which are outside defined town centre boundaries. Impact assessments should be undertaken in a proportionate manner having regard to the scale and nature of the floorspace proposed and the centre(s) which are likely to be impacted.

Identification of retail need

15.10 Our study has identified the following levels of quantitative need which the Council should seek to plan for over the period to 2041**. <u>It is considered that figures to 2034 should be taken forward into the Local Plan review</u>**, and figures beyond this should be subject to further review. Overall, the levels of quantitative need identified are low, for a combination of reasons:

- In terms of comparison goods, the 'market share' for Bromley town centre (the main destination for comparison goods spending in the Borough) has reduced relative to the position in the 2012 Study, as has that of Orpington town centre.
- There are significant and high levels of online shopping for both comparison and convenience goods which in both cases are above the UK average. This reduces the need for new 'bricks and mortar' floorspace as a higher proportion of the total 'pot' of available expenditure on retail goods is directed online.

- In terms of convenience goods, there is very limited growth in per capita spending on convenience goods forecast over the Local Plan period.
- Furthermore, whilst some foodstores are trading extremely well, others are under-performing, which reduces the 'need' for additional convenience goods floorspace in quantitative terms.
- Together, these factors suggest that the overall policy focus of the Council should be on improving the quality and securing the positive re-use of existing property stock rather than planning for significant amounts of new retail floorspace.

15.11 **Table 15.1**[62] summarises the quantitative needs which the study has identified, which have been split into broad areas to assist in future strategic planning. Red figures indicate a negative 'need' i.e. oversupply of floorspace. The need figures have been presented as separate comparison and convenience goods needs, in line with the requirements of the study, and it is recommended that category-based figures are taken forward into the Council's new Local Plan to ensure effective spatial planning of new retail floorspace. However, for reference, and having regard to the additional flexibility afforded by class E, we also present a total quantitative retail need figure for each of the three areas.

Table 15.1 Summary of quantitative retail need for LBB at 2034 and 2041 (indicative)

	Comparison goods		Convenience goods		Total	
	2034 (sq.m net)	**2041 (sq.m net, indicative)**	**2034 (sq.m net)**	**2041 (sq.m net, indicative)**	**2034 (sq.m net)**	**2041 (sq.m net, indicative)**
Urban north of Borough	-1,400	-100	700	1,100	-700	1,000
Orpington and Petts Wood	-600	-100	200	500	-400	400
Rural south of Borough	0	0	-500	-400	-500	-400

Source: Tables CM8b-d Appendix 1 and Tables CV8-d Appendix 2.

15.12 In our view, the need figures identified translate to the following strategic needs by sub-area:

LBB-07: the Council should plan for the levels of quantitative need identified in Table 15.1, with the following conclusions drawn for each sub-area:

• Urban North of Borough (Bromley, Beckenham, Penge, West Wickham, Crystal Palace): the identified comparison goods needs do not translate to a need to allocate floorspace for development. The identified convenience goods needs translate to a requirement equivalent to one additional foodstore in the region of 700 – 1,100 sq.m net convenience goods floorspace. In strategic terms, it would be beneficial for this to come forward in the Beckenham / Penge corridor to improve consumer choice in this part of the Borough. It is noted

[62] Figures in Table 15.1 reflect the 'baseline' quantitative needs which this study has identified, utilising Experian-based population projections. We have also undertaken a sensitivity test of levels of need arising from GLA-based population projections, please refer to full discussion of this in Sections 12 and 13.

that there is a lack of discount food retailing provision serving residents in this part of the Borough. Please see strategic recommendations for Beckenham and Penge below.

• Orpington and Petts Wood area: There is no strategic requirement to plan for comparison goods floorspace and a modest need for between 200 and 500 sq.m net convenience goods floorspace (equivalent to 2-3 convenience stores e.g. Tesco Express). It is not considered strategic allocations are required to meet this need.

• Rural south of Borough: no strategic needs identified.

15.13 We make the following additional recommendations in terms of the identification of need:

LBB-08: The quantitative needs identified in this study are intended as strategic guidance, and confirm that there is no requirement for the Council to plan for allocations for new retail floorspace / facilities in its new Local Plan. The need forecasts are not intended to act as a 'ceiling' on new retail development and applications for new development should be considered on individual merits, as well as demonstrating compliance with retail policy (sequential and retail impact) tests, where relevant.

LBB-09: The identified quantitative capacity requirements set out in this study (summarised in **Table 15.1**) should be kept under regular review throughout the Council's Local Plan period. Figures beyond 2034 should be considered as indicative only.

LBB-10: Needs for the Orpington & Petts Wood sub-area may need review in the event any redevelopment of the Walnuts Shopping Centre in Orpington town centre comes forward and is granted planning permission, depending on the scale and nature of retail / main town centre uses which is proposed as part of this.

LBB-11: If there are any significant changes in economic circumstances over the course of the Plan period, the Council should instruct a review of retail needs figures.

LBB-12: Whilst there is no identified quantitative need for significant additional comparison goods floorspace for LBB over the new Local Plan period, any major applications seeking provision of this nature should be directed towards Bromley (and Orpington) town centre in the first instance and should, where necessary, demonstrate compliance with the sequential and impact retail policy tests.

LBB-13: proposals which seek to deliver additional commercial leisure floorspace within town centres, particularly those which positively contribute to a daytime and evening/ night time economy, and increase footfall, spend and dwell-time, should be supported in principle provided amenity and other relevant considerations are acceptable. Where such uses are proposed outside of town centres, retail policy (sequential / impact tests) will also apply.

Recommendations for Bromley town centre

15.14 Bromley town centre is continuing to generally display positive signs of vitality and viability. It continues to perform strongly as a comparison goods shopping destination. It has a good range of non-food national multiples, including key anchors such as M&S, H&M, Primark and TK Maxx as well as a strong core of supporting retailers such as Apple, Zara, Boots, Next, Waterstones and similar. There is evidence of retailer investment in the centre, with M&S recently refitting their store and H&M introducing a H&M Home store. The Glades Shopping Centre feels relatively modern and has successfully attracted new more premium-end retailers to the centre in recent months. There is a good, self-contained 'retail circuit' within the centre. The pedestrianised High Street is attractive, and the market held within this area is an important footfall generator in its own right. The centre has a reasonably strong food and beverage offer, although greater integration is needed between this and the retail offer. The centre is also highly accessible from across the whole of the Borough and beyond.

15.15 There is a strong convenience offer which neatly bookends the two ends of the town centre by way of the anchor Sainsbury's and Waitrose stores, although the latter is somewhat detached from the wider retail offer and may not generate much in terms of linked trips.

15.16 Nevertheless, our health check assessment identified a number of areas in the health check assessment where the centre does not appear to be performing at its best. Most significantly, the vacancy rate in the centre remains high, and whilst there is evidence of a decrease in the last 12 months, remains the highest in the Borough. When asked about the main negative about the town centre, respondents in the household survey identified the presence of vacant units. There does not appear market interest in the two large, prominent vacant units in the centre, formerly occupied by Debenhams and Wilko. Encouragement for these to be repurposed for mixed use or smaller-format units may be beneficial.

15.17 The centre also has an issue of being highly polarised, with different uses contained within different parts of the centre and there being limited overlap in these offers. For example, the town centre's sole remaining cinema, the Vue at St Mark's Square, is located at the very southern tip of the town centre, with an entrance that turns its back on the wider offer of the centre. However, the town centre' prime early-evening restaurant / food & beverage offer is located in the Widmore Road / East Street areas, over 800m walk away. This does not allow the restaurants to capture the footfall from evening economy visitors to the centre as much as it should.

15.18 The polarisation of the leisure offer at either ends of the centre also means that the area connecting the two — the primary retail area — is extremely quiet outside of retail trading hours. Compounding the issue is that the southern end of the town centre – broadly speaking, between The Glades and Bromley South station – is beginning to look tired and investment is needed to bring this part of the centre up to the higher quality public realm seen along the High Street and Bromley North end of the centre.

15.19 The challenges facing the town centre will be difficult to overcome as they ultimately could be argued to reflect the fact that the town centre is too elongated. Class E affords the opportunity for a greater mix of uses to come forward across the centre as a whole and the Council should support these in principle. The relocation of the LBB offices to Bromley South and the approved redevelopment of the Waitrose site will both add footfall to the southern end of the centre and hopefully provide an impetus for the improvement of this area.

15.20 As part of the wider narrative about extending its offer, a key pillar for Bromley town centre moving forwards needs to be investment in its arts and culture sector. The Churchill Theatre evidently makes an important contribution to the culture offer of the Borough, but sits somewhat in isolation and encouragement of a broader cultural profile for the Borough is considered to be a real opportunity for the Borough over the course of its new Plan period.

15.21 It is significant to note that its comparison goods retail catchment does appear to have shrunk since the 2012 Study and the centre does not have a significant influence as comparison goods shopping destination beyond the administrative boundaries of the Borough. Whilst the London Plan definition of 'Metropolitan Centre' does suggest that Metropolitan centres 'serve wide catchments which can extend over several Boroughs and into parts of the wider south east', it does not infer such a requirement to be essential. We are also satisfied that that the town centre satisfies the other criteria for a Metropolitan Centre set out in the London Plan. On this basis, no change in the classification of the town centre in the Borough's (or London Plan) retail hierarchy is considered necessary.

15.22 Having regards to the above, we do not consider there to be a need to plan for any new comparison goods floorspace for Bromley town centre over the period to 2034, and further expansion of the retail core in the town centre should in principle be resisted in preference to consolidating the existing critical mass of floorspace in the centre.

15.23 Our assessment has identified a quantitative need for additional convenience goods floorspace in the urban north of the Borough, however in qualitative terms it is considered that this need is better met elsewhere in the Borough than in Bromley town centre. However, in line with national policy guidance, any applications for development of this nature within the town centre should be supported in principle.

15.24 Having regards to the above points we set out the following strategic recommendations for Bromley town centre.

BTC-01: Bromley town centre should continue to perform a role and function as the highest-order town centre in the Borough and as a Metropolitan Town Centre in the Borough's retail hierarchy and London Plan centre hierarchy.

BTC-02: It is not considered there is a qualitative need for additional comparison goods or larger-format foodstore provision to serve Bromley town centre. However, applications which seek to develop further convenience goods provision (either extensions to existing stores or provision of new retail facilities) within the town centre boundary may be supported in principle provided that compliance with the retail sequential test is demonstrated where necessary[63].

BTC-03: The Council should undertake regular audits of vacant units in the town centre and work with stakeholders and landlords where possible to secure the positive re-use of premises.

BTC-04: In particular, the Council should work with relevant stakeholders to secure the long-term reletting of the former Debenhams and Wilko units to quality operators (be that retail or otherwise) which will make a lasting, positive contribution to the vitality and viability of the town centre. Applications which seek to sub-divide the units in question which would assist in meeting the above objective should be supported in principle.

BTC-05: A retail and leisure impact assessment threshold of 500 sq.m (gross) for all types of retail and leisure uses which are proposed to come forward outside of Bromley town centre should be carried forward into the Council's new Local Plan.

BTC-06: The Council should work with internal and external partners to deliver environmental improvements to the southern end of Bromley town centre (between The Glades and Bromley South station) to ensure the quality of the public realm is consistent with the rest of the town centre, and to provide a better first impression when arriving via Bromley South. As part of this, mechanisms to strengthen linkages between St Mark's Square and the wider town centre could be investigated.

BTC-07: The Council should work with internal and external partners to support Bromley town centre's transition towards a more 'blended' daytime and evening economy, to encourage dwell time and support the development of non-retail sectors in the town centre. This should include encouragement of later retail opening hours throughout the week[64], but this should form part of a wider strategy to encourage more use of the town centre outside retail trading hours.

BTC-08: The Council should work with internal and external partners to support the existing and promote an enhanced cultural offer in the town centre. This should include the retention of the Churchill Theatre, enhanced library services, and the feasibility explored of a broader arts and cultural offer which will attract patronage from residents in the Borough and beyond.

BTC-09: The Council should resist proposals which will result in the loss of the Picturehouse / former Odeon cinema as a cultural use. As the highest order centre in the Borough Bromley is an appropriate location for facilities of this nature and a broader offer would help attract additional visitors and spend to the centre.

BTC-10: The Council should continue to support the established and successful Charter Market, and work with the BID and other stakeholders to explore the possibility of introducing additional specialist markets into the town centre. A strategy which seeks to promote the independent retail and leisure offer of the town centre – which is somewhat pushed to the periphery of the town centre on account of the dominance of national retail operators in the Primary Shopping Frontage (as defined by the Local Plan) – may also be beneficial.

[63] For the purposes of the sequential test, an 'in centre' location is defined as the Primary Shopping Area within a centre. An 'edge of centre' location is defined as up to 300 metres from the Primary Shopping Area for retail development. Any location beyond this is 'out of centre'. There may be instances therefore, where an application for development of retail floorspace in the town centre is still required to demonstrate compliance with the sequential test, if it falls outside the Primary Shopping Area. This is applicable to all centres in the Borough's hierarchy of centres (excluding neighbourhood/local shopping parades).

[64] Excluding Sundays, where opening hours are restricted for larger units by Sunday Trading Laws

BTC-11: The Council should support proposals for the positive reuse of the Bromley Civic Centre site following the Council's relocation to Bromley South. Proposals for the introduction of main town centre uses floorspace (except where ancillary, and/or offices) should be resisted.

Recommendations for Orpington town centre

15.25 Orpington town centre is, as a Major town centre, the defacto 'second' town centre of the Borough. It has a retail offer which is more orientated towards meeting day to day shopping needs, and whilst it has historically had a reasonably significant comparison goods shopping function, this does appear to be being significantly challenged by the retail parks to the north of the centre.

15.26 At the outset, it is important to note that Orpington town centre appears to be somewhat 'in limbo' at the time of our assessment. The historic focus of the retail activity, the Walnuts Shopping Centre, has been earmarked for redevelopment for a number of years, with previous proposals withdrawn and a revised application understood to be under preparation. Because of this, units in the centre do not appear to be being offered as long-term lets, and the quality of the offer is therefore poor and appears somewhat transient. Any future redevelopment of the centre would hopefully deliver a better quality of retail and leisure offer.

15.27 Outside the Walnuts, the performance of the centre is a tale of two halves. The southern half of the centre, broadly south of the southern entrance to the Walnuts, performs well; the units are generally modern and well maintained, footfall is high, and the large Tesco store at the southern end of the centre appears to support a good level of linked trips down this stretch of the centre. To the north of the Walnuts, the overall quality of the offer (both in terms of quality of floorspace stock and type of occupier) is generally poorer, and in much the same way as Bromley, the town centre feels excessively large in this direction.

15.28 Orpington does not appear to have particularly strong levels of demand from retail operators at the current time. Despite the units in the southern part of the centre being relatively modern and fit for purpose, there are high levels of occupancy from retailers such as charity shops. It is interesting to note that operators such as Waterstones have chosen their local representation to be at Nugent Shopping Park in preference to the town centre.

15.29 Nugent Shopping Park and associated retail warehousing along the Sevenoaks Road captures higher market shares than Orpington town centre for comparison goods shopping. Nugent Shopping Park in particular has a number of retailers which typically locate in town centres such as Waterstones (as noted above), Hotel Chocolat, Clarks, Vision Express and Card Factory. Whilst there is limited scope for the Council to control development on existing out of town retail developments such as Nugent, which have been granted with limited planning restrictions as to the range of goods which can be sold, it is recommended that any applications for further main town centre uses development outside Orpington town centre is subject to stricter requirements in terms of impact assessment thresholds. The decline in comparison goods market share which Orpington town centre has experienced since the 2012 Study provides the clear justification for this.

15.30 Despite some clear challenges to its current vitality and viability, the centre does have a number of clear strengths. It is serving day to day shopping needs well, and has a particularly strong leisure offer as a consequence of the Odeon cinema, Walnuts Leisure Centre (the subject of a significant planned upgrade by LBB). The redevelopment of the former Woolworths site will add more footfall and deliver the regeneration of a prominent vacant site in the centre, and the conversion of the former post office next door into a high-end bar/restaurant is an excellent addition to the offer of the centre.

15.31 The centre generally has reasonable public realm but some interventions in place marketing – particularly a wayfinding strategy for the town centre which enabled it to harness its key assets such as the leisure centre, and particularly Priory Gardens, would be beneficial.

OTC-01: Orpington town centre should continue to perform a role and function as a Major town centre in the Borough's retail hierarchy and London Plan centre hierarchy.

OTC-02: It is not considered there is a qualitative need for additional comparison goods or larger-format foodstore provision to serve Orpington town centre. However, applications which seek to develop further convenience goods provision (either extensions to existing stores or provision of new retail facilities) may be supported in principle provided that compliance with the retail sequential and impact tests is demonstrated where necessary.

OTC-03: The Council should undertake regular audits of vacant units in the town centre and work with stakeholders and landlords where possible to secure the positive re-use of premises.

OTC-04: The Council should work with the owners of the Walnuts Shopping Centre to deliver appropriate proposals for its long term use, which should include the reprovision of class E floorspace of an appropriate scale for its role and function as a Major town centre. Active commercial frontage should be provided across ground floor level, and permeability through the scheme should be provided to ensure full integration with the wider town centre offer to enable the wider centre's vitality and viability to benefit from the development. The footprint of commercial units within the development should be informed by market evidence at the time of application submission, but should ideally provide a varied range of unit sizes to enable different operators' needs to be met. Sui generis hot food takeaway units within the development should be resisted.

OTC-05: The Council should explore interventions which can be made to enhance the northern end of the town centre (north of the Walnuts Shopping Centre entrance) to increase footfall and deliver a higher quality public realm in this part of the centre, as well as considering measures to improve public realm between the High Street and Odeon / Sainsbury's / library.

OTC-06: The Council should consider the introduction of a comprehensive wayfinding and place branding strategy for the town centre, stretching from the railway station through the town centre to Priory Gardens, to provide clear visual signage through the centre and help define a sense of place.

OTC-07: A retail and leisure impact assessment threshold of 500 sq.m (gross) for all types of retail and leisure uses which are proposed to come forward outside of Orpington town centre should be carried forward into the Council's new Local Plan.

OTC-08: The Council should support in principle proposals for leisure and other main town centre uses which assist in diversifying the centre's offer, in particular proposals which enhance the food & beverage offer and evening/night-time economy, subject to other relevant considerations such as amenity.

District centres

15.32 The Borough's network of district centres are performing well, with good levels of vitality and viability and no clear areas of significant concern. It is considered that each of the five district centres is performing an appropriate role and function and we do not anticipate any changes to their position in the Borough's retail hierarchy moving forward.

General recommendations for district centres

BDC-01: The Council should support applications within defined district centres which will make a positive contribution to their diversity, vitality and viability, provided that proposals are of a scale appropriate to the role and function of the centre and are acceptable in terms of amenity and wider planning considerations.

BDC-02: A retail and leisure impact assessment threshold of 500 sq.m (gross) for all types of retail and leisure uses which are proposed to come forward outside of the Borough's network of district centres should be carried forward into the Council's new Local Plan.

Recommendations for Beckenham district centre

15.33 Beckenham district centre is an affluent centre where there is a strong and continued prominent food and beverage offer, which in recent years appears to have extended to include a stronger daytime offer alongside its already well established evening offer. Its pleasant environment and relatively compact nature lends itself well to this type of offer, and given its proximity to Bromley town centre we anticipate that the two are likely to compete for spending by local residents, perhaps to a greater degree than the household survey evidence suggests. The overall 'offer' of Beckenham is possibly more appealing than Bromley in this respect, although both centres lean heavily towards multiple/chain food and beverage options.

15.34 Elsewhere, Beckenham benefits from having strong foodstore anchors in the form of modern and bright Waitrose and M&S Foodhall stores, although the Sainsbury's at the western end of the centre is showing its age and the recent loss of Lidl has reduced consumer choice for those residents who are more price-sensitive. There may be scope for this unit to be brought back into use for convenience goods retail, although like Sainsbury's the unit is in need of investment. The forthcoming new Travelodge development in the centre of Beckenham is further example of recent investment in the centre. The peripheral ends of the centre require smartening up however, particularly north of Beckenham Junction station, whilst the Odeon at the western end of the centre is looking tired. Traffic congestion appears to sometimes be an issue, but this does not appear to be impacting on the vitality of the centre.

15.35 Moving forward therefore it is recommended that the strategic approach to Beckenham is one of consolidation, bringing forward investment where required and supporting its current strong mix of retail and food & beverage. There is no policy case for significant additional retail or other main town centre uses development beyond the existing confines of the centre, and such an approach would be contrary to its role and function as a district centre.

15.36 The quantitative need assessment has identified there to be a need to plan for between 700 and 1,000 sq.m of convenience goods floorspace in the urban north of the Borough, and it is considered that this would be best placed to be located along the Beckenham – Penge corridor, with priority given to sites in either town centre in line with national policy in respect of the sequential test. There is a sequential site in Beckenham district centre- the former Lidl store – which is well placed to meet the identified need.

BCK-01: The Council should support applications which seek to bring forward the former Lidl site within Beckenham district centre for replacement foodstore use, to meet an identified quantitative need for additional convenience goods floorspace in the 'urban north' of the Borough over the period to 2034. In qualitative terms, it is advised that need is considered to exist for improved representation by discount retailers in this part of the Borough.

BCK-02: If the former Lidl store comes forward for an alternative use, the Council will need to plan to meet a quantitative need for an additional foodstore (up to 900 sq.m net convenience goods floorspace) to serve the Beckenham - Penge corridor over the period to 2034. Any application for such use in a location outside a defined town centre will need to demonstrate compliance with the sequential and impact tests. Any application for such use in a location outside a defined town centre which comes forward whilst the former Lidl store remains vacant will need to comprehensively demonstrate why the Lidl site is not a suitable location.

BCK-03: The Council should work with landowners and relevant parties to improve gateways into the centre in the vicinity of Beckenham Junction / Southend Road, and also the facade of the Odeon at the western end of the district centre.

Recommendations for Crystal Palace district centre

15.37 Crystal Palace is a somewhat unique district centre, both in terms of its administrative complexities (with three different local planning authorities responsible for different parts of the district centre) and also its independent-led retail and leisure offer, which manages to successfully mix day to day shopping with a strong food and dining offer and a niche offer in the vintage and antique sectors. Each of these are important assets, and each of these should be protected and promoted moving forwards. A collaborative approach is needed between all authorities to support this, and because it is right on the periphery of LBB, Croydon and Lambeth, there is an inherent risk it attracts less priority than other centres.

15.38 The centre is not without its challenges, and we are of the view that the environmental quality of the centre is clearly compromised by the significant traffic congestion which occurs during much of the retail trading period. It is acknowledged however that is unlikely there will be an easy answer to a challenge such as this. The centre also suffers from a very poor visual appearance when approaching from the bus and railway stations on account of the prominent vacant public house at the corner of Anerley Hill and Church Road; this part of the centre falls within the demise of LBB. The Council should work with relevant parties to ensure the positive re-use of this site. There is also a need for pavements and public realm across the centre as a whole to be smartened up and decluttered.

15.39 The centre is relatively constrained and surrounded by residential streets to all directions (and within the centre of 'The Triangle') and there are no obvious opportunity sites within the centre, with the exception of the large aforementioned site on Anerley Hill. Significant development would also be out of keeping with the role and function of the centre, which we consider to be equivalent to that of a district centre and we do not envisage this role and function changing over the course of the new Local Plan period.

15.40 Crystal Palace's key asset and opportunity, aside from its unique retail offer, is the proximity of Crystal Palace Park. Significant investment is forthcoming for the Park, and the handing of the management of the future of the Park to the Crystal Palace Park Trust represents a positive future step. The park already hosts a number of live music events over the summer, bringing spend and visitors into the area, and the forthcoming reopening of the subway under Crystal Palace Parade is a positive example of the sensitive, heritage-led regeneration which the Park has needed.

15.41 It is critical that LBB and partners work together to enable local district centres - both Crystal Palace and Penge - to benefit from the Park, and vice versa. Joint place marketing, stronger wayfinding, and enhanced linkages into and through the Park from each of the centres are examples of mechanisms which can be explored. For example, the walk into Crystal Palace district centre from the park is currently convoluted and poorly signposted, and then necessitates the crossing of a busy road junction. A pedestrian route, with clear wayfinding from Crystal Palace to Penge district centre through the park, routing via its key assets and features, should be considered by relevant parties. Both Crystal Palace district centre and its park are amongst South London's strongest assets and their combined offer has considerable appeal.

CYP-01: The Council should work with neighbouring authorities to deliver a joined up policy approach to Crystal Palace district centre, to enable a greater degree of coherence to be applied to future planning and investment in the district centre. This should include delivering greater coherence to public realm and environmental interventions.

CYP-02: The Council should work with landowners and relevant parties to bring forward key opportunity sites in the LBB-demised part of the centre which are currently negatively impacting on its overall vitality, particularly the former Grape & Grain public house site on Anerley Hill.

CYP-03: The Council should work with partners to deliver improvements to linkages between the district centre into and through Crystal Palace Park, including investment in wayfinding and place marketing, and explore scope for a coherent route which links the district centres at Penge and Crystal Palace via Crystal Palace Park.

Recommendations for Penge district centre

15.42 Penge district centre is another centre which, overall, we consider to be displaying overall positive signs of vitality and viability. Its offer is generally more 'functional' than some of the other district centres in the Borough, but in this sense it is fulfilling its role and function adequately. The centre benefits from good levels of accessibility and meets day to day shopping needs, although has suffered from the loss of Wilko and Lidl in recent years. More positively, new independent businesses are opening at prime locations within the town centre, including a coffee roastery and record shop in recent months. The vacancy rate nevertheless remains relatively high and should be monitored.

15.43 The Sainsbury's store in the centre is a strong anchor, but because it is located at the southern end of the centre, the central stretch of the High Street does feel quiet in terms of footfall and key attractors, before picking up at the northern end of the centre where a more diverse range of independent range of operators have become established in recent years. The recent loss of Wilko from the Blenheim Centre is likely to have impacted the centre in this respect.

15.44 The food and beverage offer of the centre is under-represented compared to other district centres and the centre scores poorly in terms of market shares for key food & beverage commercial leisure sectors. The offer is overly skewed towards the fast food / take-away sector and, especially as parts of the centre benefit from very wide pavements, there is an opportunity for the offer of the centre to be more diversified.

15.45 During the course of preparation of this study, a resolution to approve planning permission was granted for the redevelopment of the Blenheim Centre (subject to Mayoral direction), which will deliver new residential development into the centre combined with replacement commercial floorspace. It is our understanding that the replacement floorspace within the centre makes provision for a new foodstore (replacing the Iceland which will be lost as part of the centre), and this is supported in order to provide consumer choice to residents in the Penge area. As no formal decision notice has been issued, it is not known if the Council have recommended conditioning the commercial floorspace for this use.

15.46 As with Crystal Palace, there is a clear opportunity for Penge to enhance its linkages with nearby green assets, including the recreation ground and Crystal Palace Park. With the latter, Penge benefits from proximity to a number of the key assets in the park, include the historic dinosaur sculptures and the Sunday food market, and the scope to enhance linkages to this should be explored.

PNG-01: Over and above the commercial floorspace proposed as part of the Blenheim Centre redevelopment, as referenced in recommendation BCK-02, there is a quantitative need for a new foodstore (700 to 1,000 sq.m net convenience goods sales) to serve the Beckenham-Penge area over the period to 2034.

PNG-02: There is a sequential site in Beckenham district centre which is considered best suited to meeting these needs. If this is site is not available or can be robustly considered unsuitable, any applications for development of floorspace of this nature outside a defined town centre will need to include consideration of sites within and on the edge of Penge district centre as part of any sequential assessment.

PNG-03: Applications which seek to diversify the commercial leisure offer in the district centre, in particular through the enhancement of the food & beverage offer, should be supported in principle.

PNG-04: The Council should work with partners to deliver improvements to linkages between the district centre and local open space assets, including into and through Crystal Palace Park, including investment in wayfinding and place marketing, and explore scope for a coherent route which links the district centres at Penge and Crystal Palace via Crystal Palace Park.

Recommendations for Petts Wood district centre

15.47 Petts Wood is the sole district centre on the eastern side of the Borough, sitting in proximity to Orpington. Overall, we are satisfied that the vitality and viability of the centre is generally good, although there are certain aspects of the centre, particularly in terms of its environmental offer, which the Council should seek to improve. Nevertheless, the centre has good ‘anchor’ stores in the form of Morrisons and Iceland; benefits from a strong and emerging food & evening dining offer; and, on the eastern side of the centre, has an architecturally attractive environmental quality.

15.48 The principal constraint affecting the centre is the fact that it is divided in two by the Victoria - Bromley South railway line. The two sides of the centre each offer a range of functions which would be expected in a district centre, but the offer is generally stronger on the eastern side of the centre where there is a more diverse range of uses and where the architectural quality of the centre is stronger, feeling more ‘village like’.

15.49 The western side of the centre (west of the railway line) feels considerably more functional and somewhat austere by comparison. The only method of crossing between the two sides of the centre is via the railway station, which does not make for a particularly attractive routing through the centre and does not encourage users of the centre to make the trip between the two sides of the centre in significant numbers. Furthermore, the western approach to this crossing point - via a cul de sec at the side of the service yard for the Morrisons - is particularly uninviting and is likely to be particularly off-putting outside of retail hours. The western side of the centre in general would benefit from a degree of ‘softening’ to reduce the harsh impact of the uniformity of the buildings and wide pavements.

15.50 Environmental constraints aside, Petts Wood has a good offer but has scope to perform stronger if the two sides of the centre could perform more in unison. The Morrisons store which anchors the eastern side of the centre enables main food shopping needs to be met by users of the centre, although the store is dated both internally and externally and the household survey results show it to be underperforming. Given its location adjacent to the railway station there may be scope for a degree of intensification of this site in the future (potentially include the petrol station site to the south as well) to introduce additional residential floorspace into the centre as part of a higher density development. Were this to come forward, any such proposals should include a replacement foodstore of comparable size to the existing Morrisons at ground floor level.

PWD-01: The Council should seek to deliver environmental improvements to the district centre, particularly on the western side of the railway line, including improvements environmental quality, planting and public realm, to assist in providing a better sense of place and softening the visual appearance of the centre.

PWD-02: The Council should work with relevant bodies to enhance pedestrian connectivity between the two sides of the district centre via the railway station footbridge. In particular, scope for enhancements to West Approach should be considered to improve both environmental quality and public safety.

PWD-03: The Morrisons store on Queensway, together with the adjacent petrol filling station, represents a potential opportunity site which offers scope for intensification. Any proposals for development of this nature should be required to include replacement convenience goods floorspace capable of meeting main food shopping needs.

Recommendations for West Wickham district centre

15.51 West Wickham benefits from good levels of vitality and viability and is performing well as a district centre. A combination of a strong existing offer (two Sainsbury’s stores which bookend either end of the centre and a centrally-located M&S Foodhall) combined with recent investment in the centre (the redevelopment of the library and the opening of a new Lidl store, both at the eastern end of the centre, provide the centre with multiple ‘anchor’ stores and a retail circuit which can draw footfall throughout the length of the centre.

15.52 The centre is certainly reliant on the presence of these foodstores to support the overall vitality of the centre, but for centres at district centre level this is not untypical. The centre is also one of the few centres in the Borough which still includes retail banks, providing a valuable additional service for residents. It also has an unusually strong comparison goods offer given its role and function, with a particular focus on home interiors and showrooms. Whilst these uses are not likely to be significant footfall generators in their own right, they do provide the centre with a distinct offer which may attract custom from further afield.

WWM-01: Applications which seek to diversify the commercial leisure offer in the district centre, in particular through the enhancement of the food & beverage offer, should be supported in principle.

Local centres

15.53 The network of local centres are performing well and do not present any concerns in respect of their vitality and viability, and we consider that each centre is performing the role and function of a local centre, although we would advise that the size of the Sainsbury's store at Locksbottom places it more akin to a district centre. We do not offer any specific recommendations for the local centres at Chislehurst and Hayes.

BLC-01: The Council should support applications within defined local centres which will make a positive contribution to their diversity, vitality and viability, provided that proposals are of a scale appropriate to the role and function of the centre and are acceptable in terms of amenity and wider planning considerations. Proposals for new development within or on the edge of local centres which are not in keeping with the scale, role and function of the centre should be resisted and directed towards the Borough's network of town and district centres.

BLC-02: The Council should continue to support the overall vitality and viability of its network of local centres through appropriate investments in public realm, maintenance and upkeep to ensure they remain attractive destinations for local residents to visit for their day to day shopping needs.

15.54 **Biggin Hill** performs an important role as a hub for a rural catchment to the south of the Borough. It is relatively compact but has a good anchor store in terms of the Waitrose store and the supporting offer can also be considered reasonable. Some investment in the public realm in the centre and more use of the wide pavements to support a 'cafe culture' in the centre may be beneficial.

BHL-01: The Council should support enhancements to the public realm within the centre, including additional planting and improved paving quality. The use of the wide pavements by food & beverage and retail operators should be supported in principle to assist in animating the centre.

15.55 **Chislehurst** is a highly attractive and affluent local centre which has an exceptionally strong catchment for a centre of its size with regards to its food & beverage offer, and in this context is clearly outperforming its role as a local centre, drawing trade from across most of the eastern part of the Borough and, to a lesser extent, further afield. Its retail offer, whilst more limited and highly orientated towards the high-end, is also a contributor to its vitality and the Sainsbury's at the northern end of the strong anchor. Because its large catchment is restricted to one type of use (i.e. food and drink) and its retail catchment remains relatively small, on balance we do not consider there to be a policy case for reclassification in the Borough's retail hierarchy.

15.56 The Borough-wide strategic approach to local centres set out under BLC-01 and BLC-02 should be applied to Chislehurst. This aside, we do not offer any specific recommendations for the Council to consider in respect of the centre.

15.57 **Hayes** is a compact local centre with low levels of vacancy and useful anchor stores in the form of the Iceland and Sainsbury's Local. The presence of the railway station centrally-located within the centre ensures the centre is likely to benefit from good levels of footfall. The Borough-wide strategic approach to local centres set out under BLC-01 and BLC-02 should be applied to Hayes. This aside, we do not offer any specific recommendations for the Council to consider in respect of the centre.

15.58 **Locksbottom** local centre can be considered to benefit from good levels of vitality although its environmental quality is perhaps not as strong as others in the Borough, on account of the wide road and some buildings of less strong architectural quality on the eastern side of Crofton Road. The Lidl store at the northern end of the centre is a good anchor, and the large Sainsbury's store which sits to the rear of the centre is one of the main foodstores serving the south of the Borough. Consideration should be given to how this store could be better integrated with the wider offer of the centre, to encourage greater linked trips. The presence of a petrol filling station centrally-located within the centre also does not make a positive contribution to the overall offer or environmental quality.

15.59 Attention is also drawn to the definition of the Primary Shopping Area for Locksbottom in the section below, which we consider should extend beyond the current defined local centre frontage to also incorporate the Sainsbury's store.

LBM-01: The Council should work with relevant landowners and operators to improve connectivity between the existing local centre frontages, the Sainsbury's store and the adjacent hospital, to maximise potential for enhancing footfall and supporting linked shopping trips.

15.60 **Mottingham** local centre appears to be performing broadly well, although the recent opening of the Lidl centre may have shifted the 'centre of gravity' towards the north of the centre. Nevertheless, it offers a reasonable mix of uses and the vacancy rate is low. The Borough-wide strategic approach to local centres set out under BLC-01 and BLC-02 should be applied to Mottingham, and the Council should also ensure that a coherent approach to the day to day maintenance of and investment in the centre is developed in partnership with RB Greenwich, under which the southernmost part of the local centre falls within. This includes for example coherent approaches to public realm such as seating and litter bins, wayfinding, planting/landscaping, and seasonal lights.

MOT-01: The Council should work collaboratively with partners at the Royal Borough of Greenwich to ensure a coherent, joined-up approach to any planned investment in, and maintenance/upkeep of, the local centre at Mottingham, to help create a coherent sense of place and ensure the vitality and viability of the whole centre is able to benefit.

Town, district and local centres – recommendations for town centre boundaries and definition of Primary Shopping Areas

15.61 We have undertaken a review of the defined town centre boundaries and frontages which are set out on the Local Plan proposals map. Our review has been informed by the findings of the health check assessments which this study has undertaken, and also changes in wider patterns of usage of town centres which have come about in recent years which have been discussed previously in this study. The discussion in the section below should be read in conjunction with the annotated Local Plan maps set out in **Appendix 12** of Volume 2 of this study.

15.62 The current (2019) Local Plan proposals map identifies, for Bromley and Orpington town centres, and the district centres, a town centre boundary and primary and secondary shopping frontages. For the local centres, no overall boundary is defined, but each centre has a defined 'local retail frontage'. However, the definition of primary and secondary shopping frontages, and 'local retail frontage' in the local centres, does not align with the current NPPF approach to defining town centres, with the glossary to the NPPF (2024) (Annex 2) only identifying how to define 'town centres' and 'primary shopping areas'. It defines 'town centres' as:

'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres <u>apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.</u> Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.' [our emphasis]

15.63 The primary shopping area is defined as:

'Defined area where retail development is concentrated.'

15.64 The NPPF (2024) (Annex 2) does not explicitly define what 'retail development' is, although the separate definition of 'main town centre uses' defines retail development as 'including warehouse clubs and factory outlet centres'. For the purposes of this report, we have considered that 'retail development' to be that which falls within part (a) of Use Class E which is use of a unit for 'for the display or retail sale of goods, other than hot food, principally to visiting members of the public';

15.65 The NPPF, in its current form, does not therefore provide an explicit requirement for authorities to define primary and secondary shopping frontages. This can be considered reflective of the wider changes to the planning system in recent years, i.e. the introduction of class E, which are designed to increase flexibility in the usage of floorspace in town centres, rather than be prescriptive about the location of retail development within a centre. However, the 'Town Centres and Retail' Planning Practice Guidance (2020) confirms that:

'Authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres.'

15.66 Having regard to the above, there are therefore three key matters which any review of the Local Plan Proposals Maps will need to have regard to:

- For each 'town centre', i.e. town centres, district centres and local centres, a 'town centre boundary' will need to be defined. Currently, the Local Plan only adopts this approach for the town and district centres, and therefore, noting point (i) above, local centres will also be required to have a 'town centre' boundary.

- Town, district and local centres will need to define a 'primary shopping area', the 'defined area where retail development is concentrated'. Currently, none of the centres in LBB have this definition.

- Primary and secondary shopping frontages should only be defined where their use can be justified in supporting the vitality and viability of particular centres. We set out below that we only consider this approach needs to be carried forward in respect of Bromley town centre in order to protect its core comparison goods shopping function.

15.67 **Table 15.2** sets out our recommendations for the network of town, district and local centres in the Borough in respect of the above points. Our comments are also shown annotated on the maps set out at **Appendix 12** (Volume 2) to the study. Broadly speaking, we consider the extent of defined town centre boundaries as adopted by the Local Plan to remain fit for purpose. However, in light of the changes in performance in some centres, we do consider there to be scope for areas of defined frontage to be reduced across a number of centres.

Table 15.2 Summary of recommendations in respect of town centre boundaries and definition of Primary Shopping Areas

Centre	Suggested approach	Justification
Bromley metropolitan town centre	Removal of former Civic Offices site from town centre boundary	Unlikely that this site will continue include significant ‘main town centre’ uses floorspace in the future. The site is already detached from the wider town centre offer by virtue of Kentish Way, therefore its removal will help support a more compact town centre focused solely to the west of Kentish Way.
	Retention of primary and secondary shopping frontages	Evidence from this study has demonstrated that Bromley town centre continues to act as the Borough’s main focus for comparison goods shopping, and continues to draw trade from a Borough-wide catchment in this respect. It may therefore be beneficial to retain an approach that protects its retail core to a greater extent as possible, to enable a critical mass of retail and other class E uses to be retained to as great a degree as in practicably possible. The primary and secondary frontages as defined by the Local Plan (2019) are considered to remain fit for purpose if the Council did wish to retain primary and secondary shopping frontage.
	Introduction of primary shopping areas	Introduce primary shopping area to reflect current NPPF approach. This should cover the existing primary shopping frontage and associated premises.
Orpington major town centre	No change to town centre boundary	Considered to remain accurate and fit for purpose.
	Introduction of primary shopping areas	Introduce primary shopping area to reflect current NPPF approach. This covers the existing primary shopping frontage and areas of secondary shopping frontage to the south of the primary shopping frontage, up to and including the Tesco Extra store.
	No definition of primary / secondary shopping frontages	It is not considered that it is necessary to define primary and secondary frontages in the town centre, provided that a primary shopping area is defined instead. Evidence has demonstrated that there is relatively limited retail demand for Orpington and prime units are occupied by lower-quality operators. Non-retail uses, some of which are located within the currently-defined primary shopping frontage, are considered to be making an increasingly significant contribution to the overall vitality of the centre. It is considered important that any definition of the primary shopping area incorporates the Tesco Extra and Sainsbury’s stores, given the anchor roles these stores play in supporting the overall vitality of the centre. If the Council decides there to be merit in retaining shopping frontages alongside the newly-defined primary shopping area, then both primary and secondary frontages should continue to be defined.
	Secondary shopping frontage – north end of High Street	The area to the north of the northernmost-entrance to the Walnuts Centre is considered to make a more limited contribution to the overall commercial offer of the centre and a broader mix of main

Centre	Suggested approach	Justification
		town centre uses and other uses could be supported in this area without, in our view, overall compromise to the vitality and viability of the centre. Accordingly it is not considered necessary to retain any secondary shopping frontage designation in this area, nor include it within a primary shopping area. Given its current concentration of commercial premises it should, however, remain in the town centre boundary.
	Review	Extent of primary shopping area (and primary / secondary frontages if retained) should be reviewed following any redevelopment of the Walnuts Centre.
Beckenham, Crystal Palace*, Penge, West Wickham district centres	No change to town centre boundaries.	Considered to remain accurate and fit for purpose. (*Crystal Palace – comments apply to LBB section only).
Beckenham, Crystal Palace, Penge, West Wickham district centres	Introduction of primary shopping areas	Introduce primary shopping area to reflect current NPPF approach. Generally, these reflect current primary shopping frontages in these centres with some minor amendments. Extent of recommended PSA shown at Appendix 10 (Volume 2).
Beckenham, Crystal Palace, Penge, West Wickham	No definition of primary / secondary shopping frontages	It is not considered that it is necessary to define primary and secondary frontages in the town centre, provided that a primary shopping area is defined instead. The district centres are supported by a wide variety of uses which contribute to their overall vitality, and this approach reflects the flexibility sought through the introduction of class E. If the Council decides there to be merit in retaining shopping frontages alongside the newly defined primary shopping area, then both primary and secondary frontages should continue to be defined.
Crystal Palace	Primary shopping area	Work with partners in LB Southwark and LB Croydon to ensure consistency in definition of PSA for Crystal Palace district centre.
Penge	Review	Extent of primary shopping area (and primary / secondary frontages if retained) should be reviewed following any redevelopment of the Blenheim Centre, if this comes forward.
Biggin Hill, Chislehurst, Hayes, Locksbottom, Mottingham local centres	Introduction of primary shopping areas	Introduce primary shopping area to reflect current NPPF approach. Generally, these reflect current local shopping frontages in these centres with some minor amendments. Extent of recommended PSA shown at Appendix 10 (Volume 2). Local shopping frontages can be retained if desired but we do not consider this to be a requirement if a primary shopping area is defined.
Hayes local centre	Removal of part of local shopping frontage (garage	This is not a main town centre use and is not considered likely to make a contribution to the overall vitality of the centre. On this basis

Centre	Suggested approach	Justification
	at junction of Pickhurst Lane / Station Approach)	it is not considered necessary to include within any amended boundary of the centre.
Locksbottom local centre	Include Sainsbury's store within PSA	The Sainsbury's store can be considered to have a functional relationship with the wider local centre (albeit one with scope for improvement).

Neighbourhood centres & local shopping parades

15.68 The network of 69 neighbourhood / local shopping range shows significant variation both in size – some have upwards of 50 units, other have under 5 – and range of facilities present. The network of existing centres should be protected to ensure local day to day needs can be protected as best possible, and support should be given to proposals which seek to introduce additional facilities in the identified areas of deficiency.

15.69 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) 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.

15.70 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.

BNC-01: The Council should seek to protect and enhance existing neighbourhood shopping parades, and support the development of additional neighbourhood-scale facilities where appropriate, particularly in areas of identified gaps in provisions.

BNC-02: In qualitative terms, there is a particular need to improve neighbourhood-level provision, particularly of day to day convenience shopping needs, in the north east of the Borough in the areas of St Mary Cray / St Paul's Cray, where this study has identified the greatest deficiencies in provision at the neighbourhood level. The Council should seek to improve these areas of local deficiency in the short to medium term when appropriate opportunities arise.

BNC-03: In areas of identified deficiency, particularly those identified under BNC-02, where new facilities are proposed (e.g. new residential developments), the Council should work with applicants to identify scope for these to include, at minimum, a local convenience store or similar facility, to enable the day to day shopping needs of existing and new local residents to be met in a sustainable manner. Appropriate restrictions should be applied on lawful use to ensure the unit remains in use for this purpose.

BNC-04: In addition to a broad objective to enhancing local-level provision in the north-east of the Borough (See BNC-02), the Council should support developments which provide convenience shopping facilities of an appropriate scale (i.e. small convenience shops under 280 sq.m) within or on the edge of the neighbourhood centres at Downe Village, Downe and Kelvin Parade, Orpington, where a deficiency in facilities of this nature has been identified by our analysis.

BNC-05: The Council may wish to consider amending the defined boundary of the neighbourhood centre at Beckenham Road, Beckenham to include the convenience store which is slightly detached from, but has a clear functional relationship with, the wider neighbourhood centre.

BNC-06: The current classification of neighbouring centres and local shopping parades provides a broad scope of centres with substantial variations in size and range of facilities offered. As part of any changes to the Borough's hierarchy of centres in its new Local Plan, the Council may wish to consider splitting these centres into two distinct categories.

BNC-07: The Council may wish to consider the designation of High Street, Green Street Green and Burnt Ash Lane as local centres, on account of the fact that both of these centres can be expected to have a wider shopping catchment on account of the presence of larger supermarkets within the centre boundaries.

BNC-08: The Council should, when planning for new developments of neighbourhood shopping facilities, have regard to the changes to the Use Class Order which came forward in 2020, in particular the introduction of class F2, which allows, under F2(a), the protection of shops selling mostly essential goods, where the shop's premises do not exceed 280 square metres and there is no such facility elsewhere within 1000 metres. Adopting this approach to the development of new neighbourhood facilities will help protect their loss to other uses under the flexibility of Use Class E.

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