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BEXLEY RETAIL & LEISURE STUDY VOLUME 2

TOWN CENTRE HEALTHCHECKS: 2018

for:

London Borough of Bexley

May 2021

lsh.co.uk

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Signed:

For and on behalf of Lambert Smith Hampton

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1 INTRODUCTION & SCOPE OF STUDY

1.1 The London Borough of Bexley (hereafter referred to as the Council) commenced a review of their Local Plan in 2017 and began commissioning evidence in 2018, including the update of the *Retail and Leisure Capacity Study*. The Local Development Scheme (LDS) timetable at that time proposed adopting the new Local Plan in 2021, with the plan period ending in 2036. Since then however, circumstances beyond the Council's control - including the Government's planning reform, the delayed progression of the new London Plan and the impact of the Covid-19 pandemic - meant that this timetable was amended to ensure that these changes could be properly considered and addressed in the emerging new Local Plan. The new adoption date is now scheduled for 2022, with the plan period covering 2021 to 2038.

1.2 Lambert Smith Hampton ('LSH') was subsequently commissioned by the Council in April 2021 to review, refresh and update the *Bexley Retail Capacity and Leisure Study* (BRCLS) in part[1]. This study provides the robust evidence needed by the Council to inform the preparation of its new Local Plan and other development plan documents. It has been prepared in the context of current and emerging local, regional and national development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF). Where relevant the study also draws on advice set out in the National Planning Practice Guidance (PPG), which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. Consideration is also given to the Bexley's Growth Strategy, which identifies significant growth for the Borough up to 2050.

1.3 The study is presented in a series of inter-related Volumes. This Volume 2 study sets out the findings of the health check assessments carried out for the Borough's main centres:

- Bexleyheath Strategic Centre
- Crayford Major District Centre
- Erith Major District Centre
- Sidcup Major District Centre
- Welling Major District Centre

1.4 Health checks are important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

1.5 It should be noted that the health check evidence and findings presented in this Volume 2 study relate to assessments carried out in 2018. The Council did not commission LSH to update the health checks as part of the April 2021 commission, as it was determined that more time was needed before the full impacts of the pandemic on each centre could be robustly assessed. The health checks will therefore be updated in late 2021, or early 2022.

[1] Carter Jonas prepared the initial draft of the BRCLS update in 2018, but this was not published by the Council for the reasons set out in paragraph 1.1.

2 APPROACH & KEY PERFORMANCE INDICATORS

2.1 In accordance with the PPG[2] there are a number of Key Performance Indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres, including:

- the 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;
- perception of safety and occurrence of crime;
- state of town centre environmental quality;
- balance between independents and multiples;
- any evidence of barriers to new businesses opening and existing business expanding[3];
- opening hours/availability/extent to which there is an evening and night time economy offer[4].

2.2 In this case the most reliable KPIs have been gathered for each centre (where available) to help inform the broad SWOT assessment of their overall **S**trengths and **W**eaknesses from a retail and leisure perspective; the **O**pportunities for new sustainable development and growth; and any current and potential future **T**hreats to their overall vitality and viability.

2.3 We have referred to a number of datasets and carried out primary market research to help assess the relative vitality and viability of Bexley's main town centres. Our approach and the KPIs assessed are briefly described below:

DIVERSITY OF USES

2.4 The health check assessments have been principally informed by the Experian Goad Category reports for each centre published in 2011-12 and 2016-18.

Centre	2011 / 2012	2018
Bexleyheath Strategic Centre	July 2011	March 2017
Crayford Major District Centre	August 2011	March 2018
Erith Major District Centre	January 2012	January 2018
Sidcup Major District Centre	July 2012	July 2016
Welling Major District Centre	October 2012	January 2018

Source: Experian Goad Category Reports. 2011/12 Reports are reported in the Council's 2013 *Retail and Leisure Needs Study*.

2.5 The Goad reports set out the number and proportion of units and floorspace[5] by different uses (i.e. convenience, comparison, leisure and service uses). Each centre is audited by Experian on an annual or

[2] Paragraph 006. Reference ID: 2b-006-20190722

[3] These KPIs were introduced by subsequent revisions to the PPG after the 2018 Study was prepared.

[4] The "evening" economy generally relates to all leisure activities that are open until around 11pm. The "night-time" economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend.

[5] The floorspace figures set out in the Experian Goad Reports are derived from Goad Plans that show the 'footprint' floorspace and the site area without the building lines. Although they do not provide a definitive report of gross or net floorspace in centres, they do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

two year cycle depending on the size of the centre. The outlet and floorspace data in each report is drawn from the town centre boundaries defined by Experian based on the Goad Plans for each centre[6].

2.6 The Experian Goad reports also provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres, based on benchmarking against the UK averages for all circa 2,000+ centres and shopping locations covered by Experian Goad.

2.7 It should be noted that 'services' as defined by Experian Goad are divided into the following three sub-categories: (i) retail services[7] (retail and certain sui generis uses, including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.); (ii) leisure services[8] (including cafés and restaurants, betting shops and fast food/ takeaway outlets); and (iii) financial and professional services[9] (including banks, estate agents, etc.).

VACANCY RATES

2.8 The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents one of the critical KPIs to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of occupier demand, and/or the fact that vacant units are not 'fit-for-purpose' (for example, in terms of size, layout and configuration) to meet the needs of modern businesses. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with caution. In this case we have assessed the changes in vacancy levels (outlets and floorspace) over time for the five main centres based on historic and current Experian Goad Category reports.

MULTIPLE AND INDEPENDENT OUTLETS

2.9 The Experian Goad reports also provide analysis of the representation of multiples and independents in centres. A multiple is defined by Experian as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong and diverse independent offer, helps to increase the overall attraction and performance of shopping centres. For many centres multiples are the key anchors to their shopping and leisure offer, helping to draw visitors from wider catchments and generate more frequent shopping trips and footfall, to the benefit of other shops, businesses and facilities in terms of linked trips and expenditure.

NATIONAL RANKING

2.10 To further help inform our understanding of the key differences between centres and shopping venues, the 2018 health check assessment draws on the VENUESCORE™ national ranking. This is an annual survey compiled by Javelin Group, which ranks the UK's top 3,500+ retail venues (including town centres, stand-

[6] The Goad Plan boundaries are not necessarily the same as the town centre boundaries defined by the Council. As a result, the number of units and floorspace set out in our analysis may not relate directly to the Council's own boundaries and centre audits

[7] Since the reform of the Use Classes Order (1 September 2020) all retail service are defined as Class E (previously Class A1). This is apart from shops not more than 280sqm "*most selling essential goods … and at least 1km from another similar shop*", which are now covered by the new Class F2 (local community uses).

[8] Cafés and restaurants are now classified as Class E (previously Class A3); betting shops are 'sui generis'; and fast food/ takeaway outlets are 'sui generis' (previously Class A5).

[9] Financial and professional services are now classified as Class E (previously Class A2).

alone malls, retail warehouse parks and factory outlet centres) based on different criteria, including the scale and quality of offer, including multiple representation.

STREET & COVERED MARKETS

2.11 The presence of high quality, well managed and diverse street/indoor markets and foodhalls in centres can have a significant positive impact on their overall vitality and viability. This is recognised by the NPPF (paragraph 85), which states that existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive. It is widely accepted that successful markets in the right locations can help increase trips to centres from a wider catchment, attract a more diverse customer profile, generate benefits for the wider daytime and evening economy, and act as "seedbeds" for the growth of new businesses. Information regarding the health of the markets discussed in this report was obtained from research and observations of the centres, and feedback from the stakeholder consultation conducted in 2018.

RETAILER REPRESENTATION & REQUIREMENTS

2.12 Evidence of requirements ('market demand') from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case evidence was drawn from standard published sources in 2018 to inform the assessment of market demand (including the *Requirements List*). However, it should be noted that this published information is not definitive, as many retailers and leisure operators prefer not to make their requirements public, as it can potentially undermine their current and future negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven; for example in response to the marketing of new development and regeneration initiatives.

PRIME ZONE A RENTS & COMMERCIAL YIELDS

2.13 The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents and yields are not available for all centres, particularly smaller centres where there is more limited evidence on transactions. Therefore, an assessment of Prime Zone A rents and yields is only provided where available.

2.14 Evidence of average commercial yield levels for centres is more difficult to source, particularly for smaller centres, as it depends on the level and volume of transactions in any one year. In general terms, where reported yields are low, this usually represents a particularly strong performing investment (e.g. yields on Bond Street in London's West End were reported to be circa 2.0%-2.25% in 2018). Conversely, where the yield value is high, this generally reflects poorer performing investments.

CUSTOMER VIEWS AND BEHAVIOUR

2.15 Our assessment of customers' views and behaviours draws on the findings of the household and in-centre ("face-to-face") surveys conducted in some of the Borough's centres in 2018[10]:

[10] It should be noted that Carter Jonas prepared the content and scope of the survey questionnaires. The questionnaires were prepared with input from the Council and other stakeholders. Both surveys were conducted by NEMS Market Research.

- **Household Telephone Interview Survey (HITS):** NEMS Market Research (NEMS) conducted some 1,000 interviews across the eight study zones between 26th April and 23rd May 2018. The detailed tabulations are set out in Volume 3 to this study and the survey-derived market shares are summarised in Volume 1 (Section 4). The household survey also asked specific questions on what respondents 'liked' and 'disliked' about the main centres.
- **In-Centre Surveys**: NEMS also carried out some 300 face-to-face interviews in Bexleyheath (150 interviews), Erith (75), Crayford (40) and Tower Retail Park (35), between Friday 8th June and Saturday 16th June 2018. The detailed survey results and tabulations are set out in Volume 4 to this study.

2.16 The findings of these market research surveys provide further critical evidence to help inform the town centre healthchecks.

STAKEHOLDER ENGAGEMENT

2.17 As part of the preparation of the original 2018 study a number of key stakeholders were contacted to ascertain their views on the relative role, attraction and performance of the main centres[11]. These included:

- Bexleyheath - Bexleyheath Business Improvement District and owners of Broadway Shopping Centre
- Erith - Centre Manager for Riverside Shopping Centre
- Crayford - Property Managers for Tower Retail Park
- Sidcup - Chair of Sidcup Business Improvement District

STATE OF TOWN CENTRE ENVIRONMENTAL QUALITY

2.18 Environmental quality represents a key performance indicator (KPI) to help assess a centre's overall attraction, vitality and viability. An assessment of environmental quality (including, for example, cleanliness and attractiveness, security, treatment of buildings and open/green spaces) was carried out in 2018 based on the available research and evidence at the time, the findings of the market research surveys and stakeholder engagement, and as part of centre audits.

ACCESSIBILITY

2.19 A centre's vitality and viability can also be impacted by the ease of accessibility by different modes of travel, and the level and quality of car parking. This assessment was informed by the survey evidence, along with information provided by the local planning authority, and observations undertaken as part of the centre audits and site visits.

2.20 Reference is made in the report to the PTAL measure (Public Transport Access Level) for each centre. This measure rates a selected place based on how close it is to public transport and how frequent services are in the area (it does not cover trips by car). The ratings range from zero to six, where the highest value represents the best connectivity. For historical reasons, the PTAL value of one is split into two categories (1a and 1b) and the PTAL value of six is split into two categories (6a and 6b). In simple terms a location will have a higher PTAL if: (i) it is at a short walking distance to the nearest stations or stops; (ii) waiting

[11] These stakeholders were identified by the local planning authority and agreed as part of the initial stakeholder mapping exercise carried out at the inception of the study.

times at the nearest stations or stops are short; (iii) more services pass at the nearest stations or stops; (iv) there are major rail stations nearby; and (v) any combination of all the above.

2.21 The London Plan uses PTAL as one of the key factors in determining the density of housing that is desired in different parts of London. This is based on the idea that areas with good public transport service are more suitable for intense development. PTAL is also used in the London Plan to recommend how much parking should be provided for residential developments across London. To encourage the use of public transport, the general principle is to provide less parking in places with good public transport.

OUT OF CENTRE PROVISION

2.22 The existing and planned out of centre retail and leisure floorspace in the Borough and neighbouring local authority areas was determined using a number of published sources[12], evidence provided by the local authority (where available), and the findings of the market research surveys and town centre audits.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

2.23 In 2018 the Council provided evidence of all existing, committed and planned retail/leisure investment and development in the Borough's main centres. This was further supplemented by consultation with key stakeholders to better understand their existing and future investment plans and requirements. All new retail and leisure floorspace identified by this study covers commitments and permissions (normally over 500 sqm gross).

[12] For example we have referred to Completely Retail and the latest '*Definitive Guide to Retail & Leisure Parks'* published by Trevor Wood Associates. Together these datasets provides a comprehensive picture of the location, scale and operators trading outside of the main centres. These datasets have also been supplemented by information provided by the local planning authority, where available.

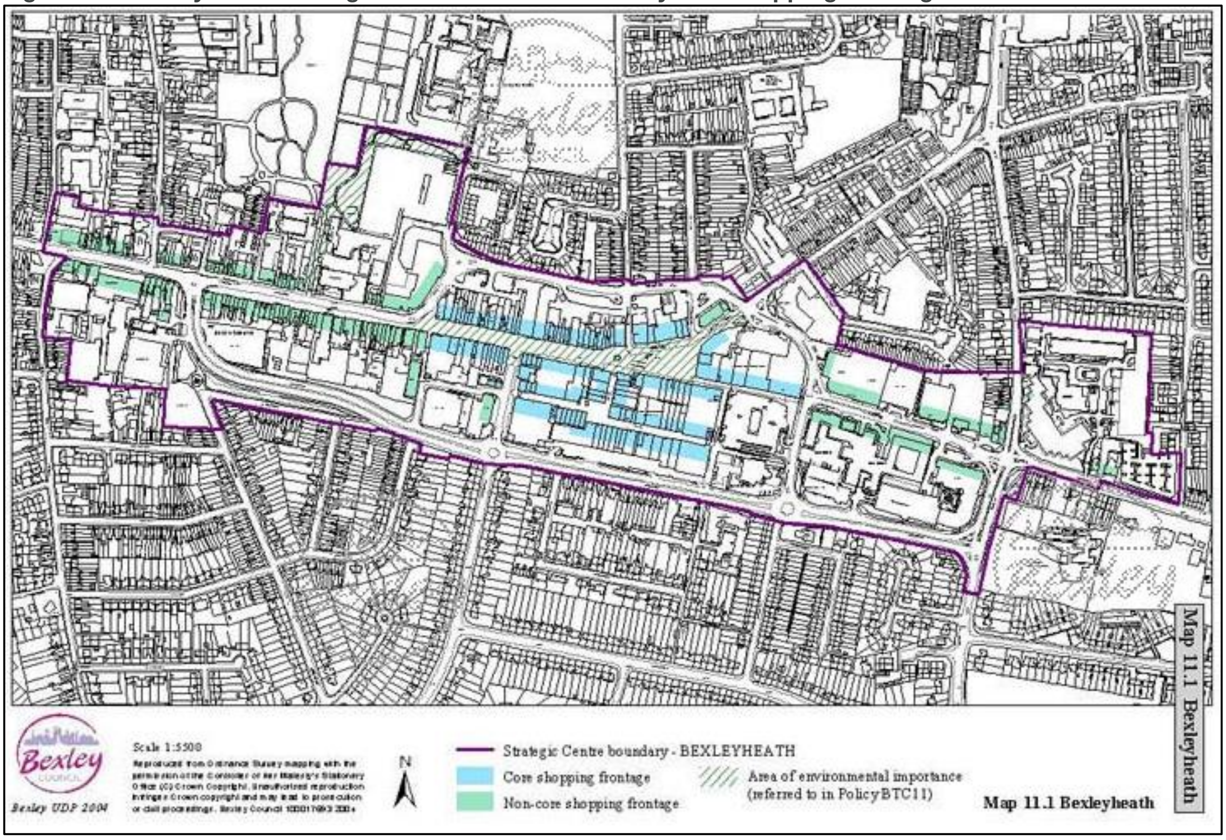
3 BEXLEYHEATH HEALTH CHECK

3.1 Bexleyheath is located in the heart of Bexley Borough approximately 4 miles (6.4km) from Dartford; 4.7 miles (7.5km) from Woolwich; and 12 miles (19.3km) from Charing Cross. It is the Borough's main shopping, service, employment and civic centre, and is classified as a *Strategic Centre* in the adopted UDP and Core Strategy, and a *Major Centre* in the London Plan (2021).

3.2 As the figure below shows, the town centre is linear in shape and is characterised by three shopping areas:

- **The Broadway Shopping Centre** opened in 1984 and is the largest covered shopping facility in the Borough. It is anchored by M&S, Morley's department store, and other national multiples (including Superdrug, The Body Shop and fast food outlets such as McDonald's, Greggs, Burger King and Starbucks).
- **The Broadway** is the main street in the centre and comprises a mix of retail and services, including Asda, restaurants and banks.
- **Broadway Square** opened in 2001 and had six large format retail units in 2018, located in a modern streetscape environment, adjacent to the Broadway Shopping Centre. It is anchored by Sainsbury's and TK Maxx, along with a number of other national retailers.

Figure 3.1: Bexleyheath Strategic Centre – Town Boundary and Shopping Frontages



Source: Bexley Unitary Development Plan (2004). Map 11.1

TOTAL FLOORSPACE & OUTLETS

3.3 Bexleyheath is the Borough's largest centre; with some 311 outlets trading from a total floorspace of 93,107 sqm. It had more than twice as much floorspace in 2018 as the next largest centres in the Borough, namely Welling (44,658 sqm) and Sidcup (43,490 sqm).

Table 3.1: Bexley Borough Centres – Total Outlets and Floorspace (2018)

Category	OUTLETS		FLOORSPACE		Average Size of Outlets
	No	% of Total	sqm	% of Total	
Bexleyheath	311	30.3%	93,107	37.6%	299
Crayford	128	12.5%	38,397	15.5%	300
Erith	72	7.0%	27,676	11.2%	384
Sidcup	240	23.4%	43,490	17.6%	181
Welling	274	26.7%	44,658	18.1%	163
TOTAL	**1,025**	**100.0%**	**247,327**	**100.0%**	**241**

Source: Experian Goad Category Reports - 2018

Notes: The floorspace figures are derived by Experian from the relevant Goad Plan, but only show the footprint floorspace and the site area, without the building lines. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

3.4 The average size of outlets in the Borough's five main centres is 241 sqm. Average unit size is highest in Erith (384 sqm) and lowest in Welling (163 sqm).

CENTRE RANKING

3.5 The table below shows Bexleyheath's centre ranking against other centres in the Borough and nearby centres outside the Borough, based on the 2017 Javelin VENUESCORE report. Bexleyheath is the top ranked centre in the Borough, and had improved its ranking from 165th in 2014. Bluewater and Bromley are ranked above Bexleyheath, which reflects the greater scale, multiple offer and quality of their shopping and leisure offer.

Table 3.2: Bexley Centres - VENUESCORE Rankings & Comparisons

Centre	Centre Rank
Bluewater Shopping Centre	27
Bromley	38
Bexleyheath	**156**
Eltham	263
Woolwich	274
Dartford	292
Welling	**558**
Sidcup	**819**
Erith	**1,276**
Belvedere	**2,377**
Thamesmead	3,133

Source: Javelin VenueScore (2017)

Notes: Crayford is not covered by the VenueScore rankings

RETAIL COMPOSITION & DIVERSITY OF USES

3.6 The tables below set out the retail mix and diversity of uses in Bexleyheath in 2018 based on the Experian Goad Category Reports published in 2011[13] and 2018[14].

[13] The 2011 Experian Goad data was sourced from the Council's 2013 Study Update.

[14] The area surveyed by Goad is not identical to the Councils' identified Town Centre Boundary (TCB), and as such, it is possible that the number of units set out using the GOAD analysis do not directly correspond to the Councils' defined centre boundary

Table 3.3: Bexleyheath – Retail, Leisure and Service Outlets

Category	2011 No. of Outlets	2011 % of Total Outlets	2018 No. of Outlets	2018 % of Total Outlets	% Change: Outlets	UK Average (%) 2018
Convenience	14	4.6%	17	5.5%		8.9%
Comparison	106	35.1%	105	33.8%	-0.9%	30.8%
Retail Service	50	16.6%	46	14.8%	-8.0%	14.5%
Leisure Service	59	19.5%	77	24.8%	30.5%	23.9%
Financial & Business Service	37	12.3%	35	11.3%	-5.4%	10.3%
Vacant	36	11.9%	31	10.0%	-13.9%	11.2%
TOTAL	**302**	**100.0%**	**311**	**100.0%**	**3.0%**	**100.0%**

Source: Experian Goad Category Reports - July 2011 and March 2018

Table 3.4: Bexleyheath – Retail, Leisure and Service Floorspace [15]

Category	2011 Space	2011 % of Total Space	2018 Space	2018 % of Total Space	% Change: Floorspace	UK Average (%) 2018
Convenience	11,789	30.7%	11,845	37.1%	0.5%	15.2%
Comparison	37,486	41.1%	31,113	31.3%	-17.0%	34.7%
Retail Service	7,581	6.9%	6,187	7.3%	-18.4%	6.8%
Leisure Service	22,297	16.4%	28,549	17.1%	28.0%	25.1%
Financial & Business Service	6810	1.5%	6,977	1.6%	2.5%	7.7%
Vacant	6,958	3.5%	8,436	5.6%	21.2%	9.8%
TOTAL	**92,921**	**100.0%**	**93,107**	**100.0%**	**0.2%**	**100.0%**

Source: Experian Goad Category Reports - July 2011 and March 2018

Notes: The floorspace figures are derived by Experian from the relevant Goad Plan, but only show the footprint floorspace and the site area, without the building lines. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

3.7 The following provides a more detailed commentary of Bexleyheath's retail, leisure and service provision.

Convenience Provision

3.8 Bexleyheath had 17 convenience units in 2018 trading from a total floorspace of 11,845 sqm. Total outlet provision (5.5%) was below the national average (8.9%), but total floorspace (31.3%) was significantly above the national average (15.2%). This reflects the fact that the centre's food and convenience offer is anchored by a number of larger format stores, including, Asda, Sainsbury's, M&S, and Iceland. The convenience provision is further supplemented by smaller stores, including two bakers, three CTNs (i.e. Confectioners, Tobacconists and Newsagents), three convenience stores, three greengrocers and delicatessens, an off licence and a health food store. There was no permanent street or covered market in the centre in 2018 to help strengthen its overall food offer..

Comparison Provision

3.9 Bexleyheath had a relatively good provision of comparison goods retailers in 2018. There were 105 businesses trading from a total floorspace of 31,113 sqm. The number of outlets (33.8%) was above the national average (30.8%), and floorspace provision (31.3%) was slightly below the national average of 34.7%. There had been a 17.0% reduction in comparison floorspace since 2011.

3.10 There was a good representation of many categories in the centre, including: general clothing (6 units), ladies fashion (7 units), charity shops (6 units); chemists and drugstores (3 units). There were 4 department

[15] The floorspace figures are derived from the relevant Goad Plan. The index is a comparison with the national average for all circa 2,000+ centres audited by Experian. Figures may not sum precisely due to rounding.

and variety stores, including M&S, TK Maxx, and Morley's. Other key retailers include Argos (trading from the Sainsbury's store), Boots, WH Smith and Primark.

Service Provision

3.11 There were 158 service outlets in Bexleyheath in 2018. This represented 50.8% of all units, which was above the national average of 48.8%. Floorspace provision (51.3%) was also higher than the national average (39.6%). The following provides a brief summary of provision in the different service categories. In 2018 there were:

- 46 **retail services**. This represented 14.8% of total outlets and was slightly above the national average (14.5%). This category is mostly made up of health and beauty outlets (23 units). Other uses included opticians (4 units); travel agents (2 units); dry cleaners (2 units); and a post office. There was a fall in units (-8.0%) and floorspace (-18.4%) since 2011.
- 35 **financial services**. This represented 11.3% of total units and was above the national average of 10.3%. There had been a -5.4% reduction in units since 2011, but an increase in floorspace (2.5%). This category comprised 10 retail banks, 10 property services, 6 legal services, 2 employment and careers outlets, 2 building societies, 2 building supplies and services, a printing and copying service and one other business service.
- 77 **leisure services**. This represented 24.8% of total provision and was marginally higher than the national average of 24.0%. There had been an increase in units (30.5%) and floorspace (28.0%) since 2012. Leisure provision consists of 20 restaurants, 12 cafes, 12 fast food takeaways, 6 bars, 6 public houses, 8 sports and leisure facilities, 2 hotels and guest houses, a cinema and other leisure amenities. The Broadway Shopping Centre is the key location for fast food dining with operators including Greggs, Burger King, McDonald's as well as cafés such as Costa Coffee and Starbucks. The Broadway is the main location for casual dining with a clustering of independent restaurants.

3.12 In summary, Bexleyheath had a relatively strong and diverse service provision in 2018.

VACANCY LEVELS

3.13 Bexleyheath had 31 vacant outlets in 2018. This represented a vacancy level of 10.0%, which was slightly below the national average of 11.2%. Vacant floorspace (8,436 sqm) represented 10.4% of total floorspace in the town, which was higher than the 2018 national average of 9.8%.

3.14 The opening of Morley's department store within the former BHS store was a positive indicator of demand for space in Bexleyheath, particularly as many BHS stores in other centres remained vacant. Vacancies had also fallen from 36 outlets in 2012.

3.15 There were two prominent vacant retail units in the town centre in 2018: the former Argos unit (following the retailer's relocation within the Sainsbury's store) in Broadway Shopping Centre and the Mothercare unit on Market Place. Discussions with New River Retail, owners of the Broadway Shopping Centre, highlighted a need for greater flexibility for units to allow change of use, particularly A1 to A3, which would allow alternative uses for the Argos Unit. This greater flexibility would allow landlords to respond to market demand and encourage take up of vacant units.

MULTIPLES AND INDEPENDENTS

3.16 There were some 127 multiple retailers in Bexleyheath in 2018. This included key brands such as M&S, Argos, Boots, Sainsbury's and WH Smith. Multiples account for 40.8% of the total units, with independent retail representing 59.2%.

Table 3.5: Multiple Retailers

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	63	49.6%	42.7%
Convenience	7	5.5%	11.2%
Retail Service	12	9.4%	9.2%
Leisure Service	29	22.8%	21.9%
Financial & Business Service	16	12.6%	15.0%
TOTAL	**127**	**100.0%**	**100.0%**

Source: Experian Goad (2018)

3.17 Overall there is a good and complementary mix of multiples and independents in Bexleyheath, serving the centre and its catchment population. It is important that the centre maintains a good mix of independents and multiples to help maintain its attraction, vitality and competitive position in the context of investment in larger centres and attractions, including Bluewater Shopping Centre.

MARKETS AND EVENTS

3.18 It is widely accepted that street markets can provide many benefits for centres. However, there was no regular street or covered market operating in Bexleyheath in 2018. There were a number of one-off markets and events that were popular; including the pop-up events organised by the Business Improvement District (BID) (e.g. Yule Village). There was also the Continental Modern Market held between 21st-24th March 2018, which include a mix of food and non-food stalls. These temporary markets and events helped to promote trips to the town, and increase footfall during the daytime and early evening. However, there may be potential to establish a regular street market, which would help to diversify Bexleyheath's retail offer, particularly where it is aimed at a niche and specialist retail offer, and attract a more diverse customer profile to the benefit of other shops and businesses.

RETAIL DEMAND & REQUIREMENTS

3.19 Appendix A (Table 1) sets out the with published requirements for Bexleyheath in 2018 based on published research at the time. There were 14 operators with requirements, equivalent to a total floorspace ranging between 5,450 sqm and 15,645 sqm gross. Interest from major retail brands is relatively modest, with the most recognisable 'high street' operators at the time including British Heart Foundation. There were no published requirements from food and beverage operators. Overall, there was limited demand for retail, service and leisure space in Bexleyheath in 2018. This was a trend that was prevalent across many other similar sized UK centres, with retail and leisure operators either focusing new store openings in 'stronger' shopping locations, and/or driving online sales.

PRIME ZONE A RENTS & YIELDS

3.20 Evidence from agents identified that Prime Zone A rents in Bexleyheath stood at around £115 per square foot in early 2018. This represented no change since mid-2017. Reported prime retail yields in Bexleyheath stood at an estimated 6.5% in 2017/18. By way of comparison, the UK average for prime high street locations was in the order of 4% - 4.25% at that time.

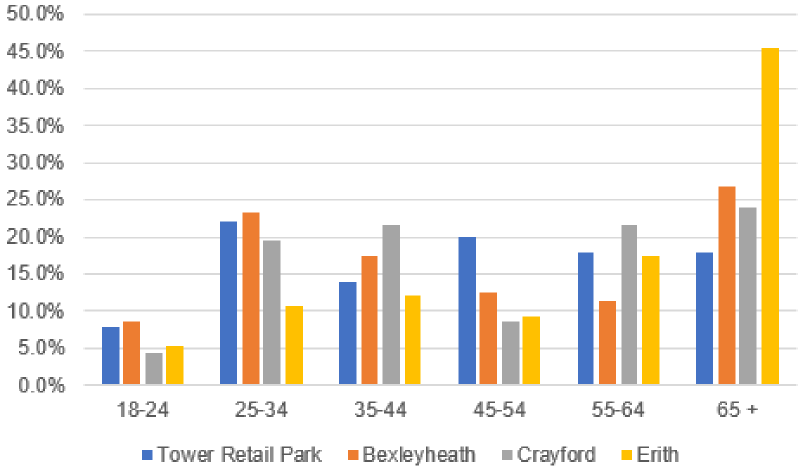
SHOPPER PROFILE: HEADLINE RESULTS OF IN-CENTRE SURVEY

3.21 The following commentary sets out the headline results of the 150 in-centre ("face-to-face") surveys conducted in Bexleyheath by NEMS between 8th and 16th June 2018 (see **Volume 4** for the full survey results and tabulations).

Shopper and Visitor Profiles

3.22 The figure below summarises the age profile of the respondents to the street survey within each centre.

Figure 3.2: Age Profile of Respondents



3.23 The key headlines are:

- A slightly higher proportion of respondents were in the 65+ years age band. Erith had the highest proportion of respondents aged 65 or more (45.0%), and Tower Retail Park had the lowest proportion.
- A smaller proportion of respondents in all the centre were aged 18-24 year olds. Bexleyheath had the highest number of younger visitors aged 18-24 years (8.6%).
- Bexleyheath also had the highest proportion of respondents aged 25-34 years (23.3%) compared with the other centres.
- Tower Retail Park had the highest proportion of respondents aged 45-54 years, and Crayford had the highest proportion aged 55-64 years.

Main reasons for visit

3.24 The main reasons why respondents visit Bexleyheath is for shopping; either non-food shopping (27.3%), food shopping (21.3%) and/or window shopping (13.3%). This highlights the importance of the centre as a sub-regional shopping destination (see Table B1, Appendix B) . Other secondary reasons include for work (60.0%), window shopping (27.3%), browsing (18.7%) and socialising (14%).

3.25 Those interviewed were also asked why they visit Bexleyheath in preference to other centres in the Borough (see Table B2, Appendix B). The main reasons included the fact that Bexleyheath is convenient and close to where they live (28.0%), it had a good range of shops and services (14.7%) and because respondents could meet friends and relatives in the centre (8.7%).

Spending Levels

3.26 Respondents were asked how much they spent, or expected to spend in Bexleyheath on the day of their visit. The figure shows that there is a higher amount of spend on comparison items than convenience goods. On average, a higher proportion of respondents spend between £21 and £30 (17.3%) on comparison goods, and higher proportion spend over £31 on food and convenience goods.

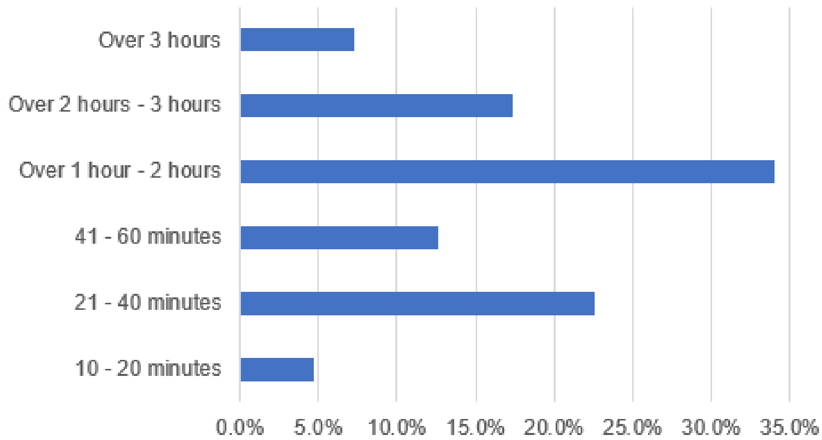
Figure 3.3: Spending levels in Bexleyheath

3.27 Respondents were also asked what they had purchased or intended to purchase on the day of their visit. The main spend was on food and drink (36.0%), clothing and shoes (15.3%) and DIY/hardware goods (14.6%). Other main items purchased included on games, toys, sport and music (13.3%), medical goods/ products (12.6%) and electrical/household appliances (6.6%).

Dwell Times

3.28 Respondents were asked on the day of their interview how long they intended to stay in Bexleyheath (otherwise known as "dwell times"").

Figure 3.4: Length of stay

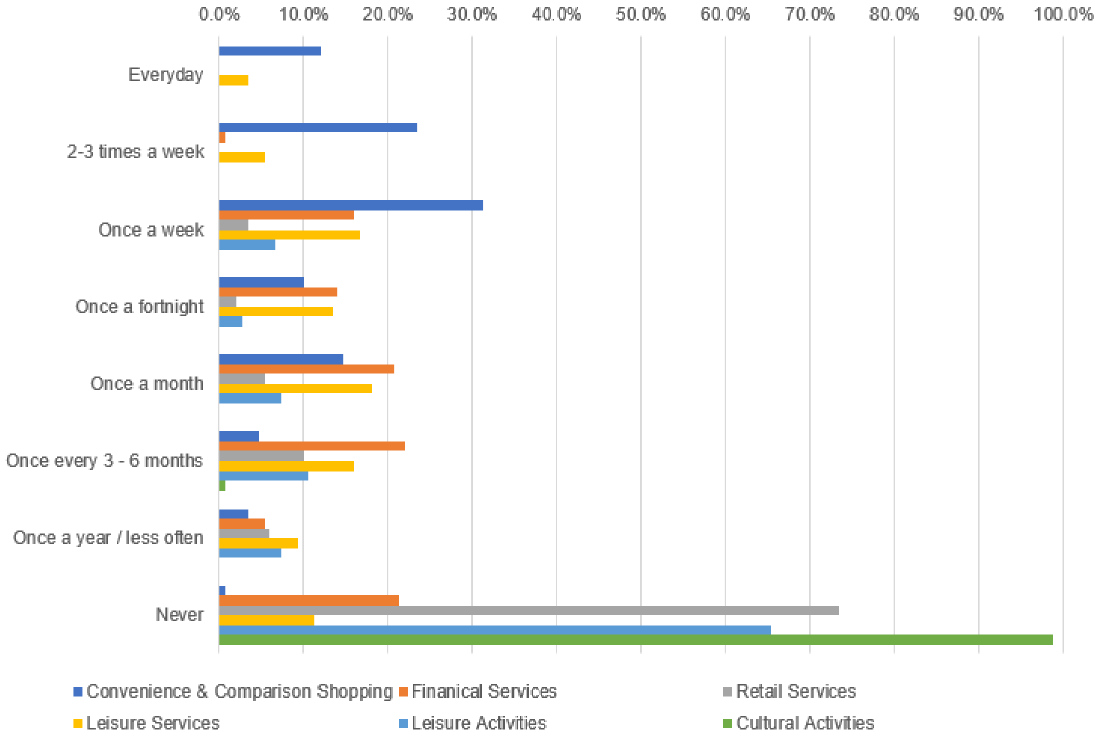


3.29 Respondents typically intended to stay for 1–2 hours (34.0%), followed by 21–40 minutes (22.6%) and over 2– 3 hours (17.3%). There would appear to be potential to increase dwell times.

Frequency of Visits

3.30 Respondents were also asked how often they visit Bexleyheath during the day for convenience and comparison shopping; retail, financial and leisure services; and leisure and cultural activities.

Figure 3.5: Frequency of visits during the day



3.31 A higher proportion of respondents visit Bexleyheath for convenience and comparison shopping at least once a week (31.3%), with some visiting more often (for example, 23.3% visit 2-3 times a week and 12% indicated they visit every day).

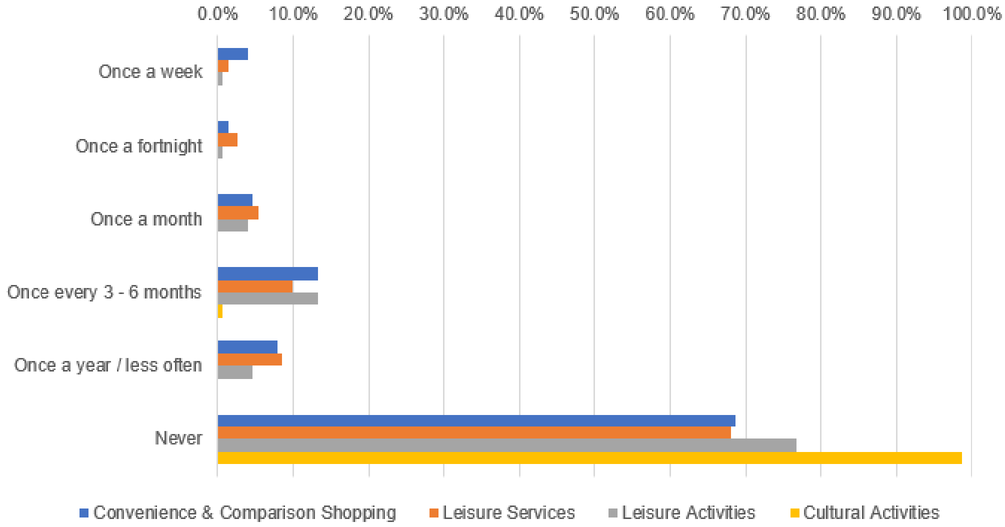
3.32 On average respondents visit Bexleyheath once every 3-6 months for financial services (22.0%), retail services (10.0%) and leisure services (16.0%).

3.33 The figure shows that a significant proportion of respondents never visit Bexleyheath for cultural activities (98.6%), retail services (73.3%) or leisure activities (65.3%). This may either indicate a lack of provision, or perceived lack of provision in these different categories, or it could be that respondents visit other locations for these types of activities.

Evening and Night Time Economy

3.34 Respondents were asked how often they visit Bexleyheath during the evening (after 5pm) for convenience and comparison shopping, leisure services, and leisure/cultural activities.

Figure 3.6: Frequency of visits during the evening



3.35 The survey results show that the majority of respondents never visit Bexleyheath during the evening. A significant proportion never visit for cultural activities (98.6%). Of those that do visit Bexleyheath during the evening, the highest proportion visit either once every 3-6 months or once a year. The most popular activity during the evening is convenience and comparison shopping and leisure activities. What this suggests is that there is either a real lack of evening time offer or it is perceived. Either way, it presents the opportunity to promote leisure and cultural activities in the town centre.

Most popular stores

3.36 The top ten most popular stores as identified by respondents to the survey are:

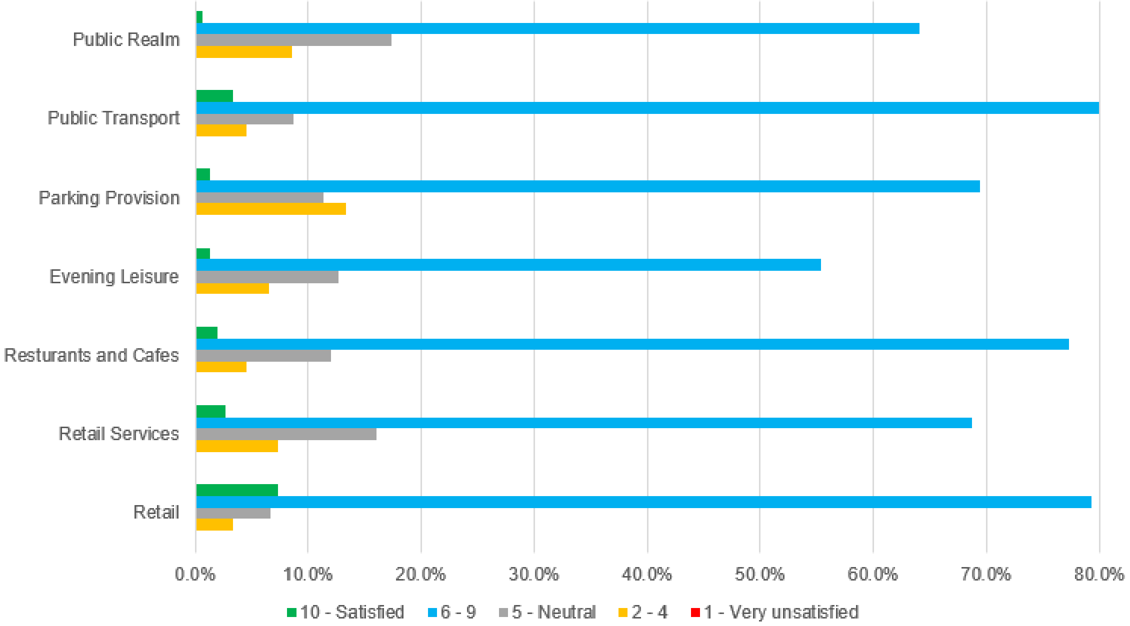
- M&S, Broadway Shopping Centre - 12.00%
- Asda, Broadway - 10.00%
- Poundland, Broadway Shopping Centre - 10.00%
- Sainsbury's, Broadway Shopping Centre - 7.30%
- Wilkinson, Broadway Shopping Centre - 6.60%
- TK Maxx, Broadway Shopping Centre - 5.30%
- Argos, Broadway Shopping Centre - 4.00%
- H&M, Broadway Shopping Centre - 2.60%
- Primark, Broadway Shopping Centre - 2.60%
- WH Smith, Broadway Shopping Centre - 2.00%

3.37 The most popular and most visited stores are all located in the Broadway Shopping Centre.

Satisfaction Levels

3.38 Respondents were asked how satisfied they are with Bexleyheath's key facilities and attractions on a scale of 1 (very unsatisfied) to 10 (very satisfied).

Figure 3.7: Satisfaction levels across Bexleyheath

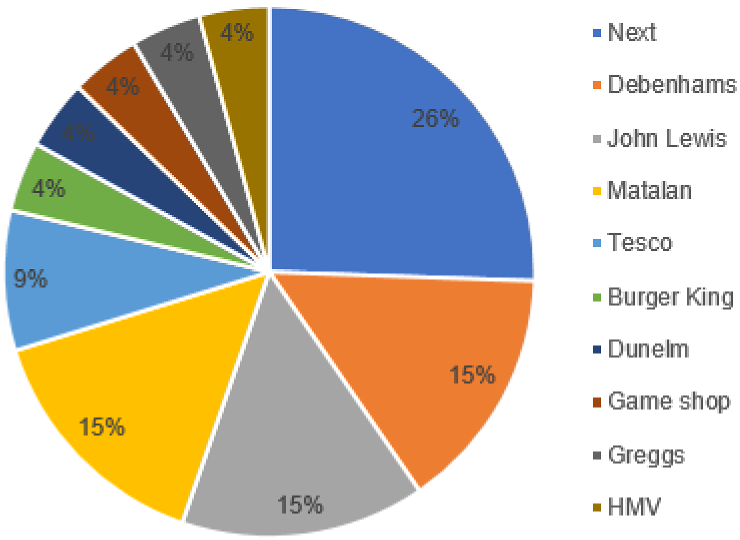


3.39 Overall, the majority of respondents were "moderately" satisfied (answers scoring 6–9) with Bexleyheath. Respondents are mostly satisfied (answer of 10) with the retail offer (7.3%) and least satisfied (answers scoring 2–4) with the parking provision (13.3%). Overall however, respondents are satisfied with Bexleyheath with the majority of responses recording 5 or above.

Suggested Improvements

3.40 Respondents were asked in 2018 which retailers they would like to see in Bexleyheath that would encourage them to visit more often.

Figure 3.8: Top 10 retailers respondents would like in Bexleyheath



3.41 A significant proportion of respondents called for key multiples, including Next, Debenhams, John Lewis and Matalan. Responses also included suggestions for operators that already trade in the town centre (e.g. Burger King and Greggs), which may suggest that some respondents are not fully aware of the town centre's retail and leisure offer.

3.42 The list below shows what town centre uses would encourage respondents to visit Bexleyheath more often. The most popular responses included more leisure facilities, women's fashion shops, books/ hobby/ sports/ pets shops and homeware stores.

- Leisure facilities - 15.3%
- Women's fashion - 10.6%
- Books, hobby, sports and pets shops - 7.3%
- Homeware stores - 5.3%
- Newsagents, florists, laundrettes, shoe repairs, etc. - 4.6%
- Restaurants and cafes - 4.6%
- Don't know - 4.6%
- Gift shops - 4.0%
- Domestic electrical goods - 4.0%
- Children's wear - 3.3%

Key Focal/Meeting Points in Bexleyheath

3.43 Respondents were asked where they would typically meet up with a friend in the town, and where they "feel" they have left the town centre. The plan below shows these key points.

Figure 3.9: Key meeting/focal points in Bexleyheath

Key

A point where respondents feel they have left the town centre

A point where respondents meet up with their friends

3.44 A large proportion of respondents typically meet up with their friends near key multiples such as Boots, Costa and Starbucks. When asked were respondents felt aware that they have left the town centre, a mix of in-centre and edge-of-centre locations were recorded. In addition to these, respondents said they feel they have left Bexleyheath on the bus or train (11.3%), when driving home (7.3%) or in the car (2.6%).

CUSTOMER VIEWS & PERCEPTIONS - HOUSEHOLD SURVEY

3.45 To help understand the overall attraction and performance of Bexleyheath from a retail and leisure perspective, the 2018 household telephone interview survey (HTIS) asked respondents how often they visited the centre, what they "*liked*" about Bexleyheath, and what "improvements" would potentially make them visit the town more than they currently do.

3.46 In terms of frequency of visits, 29.3% of respondents across the wider Catchment Area (Zones 1-8) who visit Bexleyheath for non-food shopping and/or leisure reasons stated that they visit the town centre at least once a week (see Table C1, Appendix C). This increased to 36.3% within the Borough area (Zones 1-6) and 45.6% within Bexleyheath's "core" survey zone (i.e. Zone 4). The survey results also show that 25.2% of respondents in the Catchment Area, 15.3% in the Borough and 13.9% in Bexleyheath's "core" zone stated that they "never" visit Bexleyheath for shopping or other purposes.

3.47 The majority of respondents like the centre because it is close to where they live. Other positive aspects include the good range of non-food shops, the choice of high street retailers, and the mix of independent shops (see Table C2, Appendix C).

3.48 In response to what improvements would potentially encourage respondents to visit Bexleyheath more than they currently do, a high proportion of respondents indicated “nothing”. Others identified the need for more high street retailers generally, and specifically for more comparison and independent shops (see Table C3, Appendix C).

ENVIRONMENTAL QUALITY

3.49 Based on site visits conducted in 2018, Bexleyheath generally had a good environmental quality. It is well-kept, tidy with clean surroundings and attractive frontages. Overall, the centre benefits from a large number of visitors, which helps to create a busy and bustling feel to the Town Centre.

3.50 Bexleyheath is linear in shape with the main clustering of retail activity taking place along the core shopping frontages near the Broadway Shopping Centre. The non-core shopping frontages are broken up by larger buildings (including the Better Gym, the Esso Petrol Filling Station and the EDF Building), which creates a discontinuous feel along the Broadway. As a result, the Town Centre only begins to create a ‘high street’ feel after the KFC shop, due to the additional planting, wider pavements and the presence of multiple chains. The Christ Church contributes to this shift, by acting as a key area within the Town Centre.

3.51 The focal point is the Clock Tower which is situated at the centre of the modern shopping area. Built in 1912 it creates a sense of place within the centre of Bexleyheath. This area is complemented by seating, planting and lighting, which create a pleasant and welcoming environment to the user. This area could be utilised more events and leisure activities, such as outdoor seating for restaurants and cafés.

3.52 The Broadway Shopping Centre opened 1984 and is well maintained, with attractive frontages and clean surroundings. The location of Costa in the middle of the centre acts as a focal meeting point.

3.53 In terms of shortcomings, the centre needs to improve signage to and from the station. During a site visit to the centre, it was unclear where the user should be directed when immediately exiting the station. This is only made obvious on Avenue Road. The Broadway is also a very busy road which creates concerns for the pedestrian in terms of noise and air pollution levels.

ACCESSIBILITY

3.54 The town centre benefits from good road, rail and public transport connectivity.

3.55 It has a good road network. For example, the A2 provides links to Greater London and the M25. Connections to the A220 also provides further links to Crayford and Dartford.

3.56 It also has a good PTAL rating of 5. The nearest train station is located a 20 minute walk from The Broadway. This provides regular connections to London’s Victoria, Charing Cross and Cannon Street stations, as well as Dartford and Slade Green. However, the route from the railway station to The Broadway would benefit from improved signage and wayfinding, to improve the overall arrival and visitor experience. Additionally there is a need to ensure the routes are perceived as safe by pedestrians and visitors.

3.57 As Table 1a (Appendix D) shows, there were 16 buses that operated in the town centre in 2018. The main bus stops are located at the Asda, Townley Road and Market Place.

3.58 Bexleyheath also benefits from a good provision of both multi-storey and at grade parking, with over 2,800 spaces in the 11 main car parks (see Table 1b, Appendix D). The Broadway Shopping Centre, Broadway Square and the Cineworld cinema collectively provide some 1,534 spaces.

3.59 In summary, accessibility in Bexleyheath Town Centre is generally good. In terms of investment and development, it will be important to maintain an appropriate level of car parking to ensure the centre remains accessible to shoppers and visitors.

OUT-OF-CENTRE PROVISION

3.60 There is no immediate out-of-centre provision in Bexleyheath, but its catchment population does have a choice of major shopping locations outside the Borough, including (in 2018):

- **The Glades Shopping Centre** in Bromley opened in 1991 and is anchored by a large M&S store. This shopping centre is located approximately 8.3 miles way (a 32-minute drive) from Bexleyheath Town Centre.
- **The Nugent Shopping Centre** in Orpington is also located approximately 6.2 miles away (20 minute drive) from Bexleyheath Town Centre and offers key retail tenants such as M&S and Next,.
- **Bluewater Shopping Centre** is located approximately 8.4 miles (13-minute drive) from Bexleyheath Town Centre. It is a key retail attraction in the South East and draws a significant amount of trade from a wide catchment. Anchors include John Lewis and M&S, alongside high quality fashion retailers (including, in 2018, Timberland, Diesel, Karen Millen, LK Bennett, Hollister, Jack Wills, Phase Eight, Ted Baker, All Saints and Zara)[16]. As highlighted in the Volume 1 study (Section 4), there is significant committed, planned and proposed investment. This new investment will help to ensure that Bluewater continues to attract high-spend shopping trips from the wider area.

NEW INVESTMENT

3.61 Bexleyheath had benefitted from new housing development in 2018. For example, planning permission was granted in June 2018 for a 5-13 storey (518 unit) residential development on the former Bexley Council Centre site to be developed by Bellway Homes, and including commercial ground floor uses. As described above, the extension to Bluewater, anchored by Primark, was also perceived as a threat to Bexleyheath by the Bexleyheath BID. Therefore, the need for further investment in the centre in 2018 was identified as essential in order for Bexleyheath to stem further expenditure leakage to competing centres, particularly Bluewater.

[16] PMA PROMIS Report (2018)

SUMMARY

3.62 The table below summarises Bexleyheath's SWOTs based on the key healthcheck indicators.

STRENGTHS	OPPORTUNITIES
▪ Largest centre in the Borough and classified as a Major Centre in the London Plan. ▪ Borough's main shopping, service, employment and civic centre ▪ Top ranked centre in Borough. Improved its national VENUESCORE rank from 165th in 2014 to 156th in 2018. ▪ Good and diverse comparison offer - anchored by key retailers along the Broadway and in the Broadway Shopping Centre. ▪ The eastern end of the Broadway also provides a culture and leisure cluster, including a cinema and restaurants. ▪ Strong food and convenience offer - anchored by Asda and Sainsbury's. ▪ Diverse mix of multiple and independent operators. ▪ Vacancy levels (outlets and floorspace) were below the national average in 2018. However, vacancies were higher outside of the core shopping area. ▪ Linear centre with good accessibility, permeability and linkages by foot and public transport. ▪ Good parking provision. ▪ The iconic Clock Tower area is a key focal point and contributes to the sense of place. ▪ Bexleyheath has had a Business Improvement District (BID) since 2011. It represents around 200 businesses and plays an active role in delivering events and business training.	▪ The area immediately outside the Clock Tower should be improved to host events, etc.. ▪ Leisure operators should also be encouraged within this area to include outdoor seating that could create a sociable atmosphere. ▪ Potential to support more specialty markets and expand the events program supported by Bexleyheath BID. ▪ Potential to host a weekly pop up food and retail market. ▪ Potential to increase dwell times in the centre by providing more diverse uses, more event-based activities and improvements to the overall environment. ▪ Potential to improve evening and night-time economy through provision of more leisure and cultural attractions. ▪ Potential to strengthen marketing of centre to existing and wider catchment. ▪ Improve signage and wayfinding across centre, and links to railway station. ▪ Introduce more residential and flexible uses in the town centre, to the take up and/or repurposing of vacant units.
WEAKNESSES	**THREATS**
▪ There is a noticeable difference between the core and non-core shopping frontages in terms of composition and environmental quality. This creates a divide in the Town Centre. ▪ Car is the main mode of travel to the centre; which places pressure on the town's road network (including noise and emissions) and car parking. ▪ The in-centre survey identified some dissatisfaction with cost of parking in the centre. ▪ Some buildings along the Broadway are run down and in poor quality. ▪ The in-centre survey results indicated that Bexleyheath is not a main evening destination, or a destination for cultural activities.	▪ Sits below Bluewater (27th) and Bromley (38th) in the rankings. ▪ Investment in Bluewater and other competing shopping and leisure destinations (and further attraction of free parking at Bluewater). ▪ The growth of online shopping and leisure activities. ▪ The long term impacts of the pandemic on the viability of retail, leisure and other town centre business leading to closures. ▪ A rise in vacancy levels, and consequent fall in trips and footfall. ▪ The potential impact of new PDR allowing changes from Class E (including shops) to residential (Class C3) outside of planning controls.

3.63 In summary, Bexleyheath was identified as a vital and viable town centre by the 2018 health check. It benefitted from a good choice of retail and service outlets, as well as a welcoming and pleasant shopping environment.

3.64 However, the centre is vulnerable to increased competition from Bluewater, and other potential investment in nearby centres outside of the Borough. Published requirements from retail and leisure operators indicated that demand for space in the town centre was limited in 2018; and investor confidence and market demand will have been further impacted since by the effects of the pandemic.

3.65 Opportunities to revitalise and diversify the town centre should be pursued to help strengthen its daytime, evening and night-time economy[17]. Although demand from traditional high street retailers for representation in the town is limited, there could be potential to improve the town's street market and independent offer.

3.66 There is also potential to promote more residential and employment uses in the town centre. These non-retail uses would help to support Bexleyheath's overall vitality and viability, by generating increased trips, footfall and spend in existing shops and businesses.

3.67 Opportunities were also identified for improvements to the town centre environment and place-making. These included the potential to revitalise and improve the area focussed on the Clock Tower, with the potential for it to host more events and evening activities.

3.68 Finally, there is a need to promote the town's unique selling points (USPs) – along with the Borough's other main centres and assets – to help retain existing shoppers and visitors from within the Borough and further afield, as well as attract more visitors and longer dwell times to Bexleyheath and other centres. As part of this promotion, targeted events and pop-ups can help attract new visitors and make a significant contribution to the centre's overall vitality and viability.

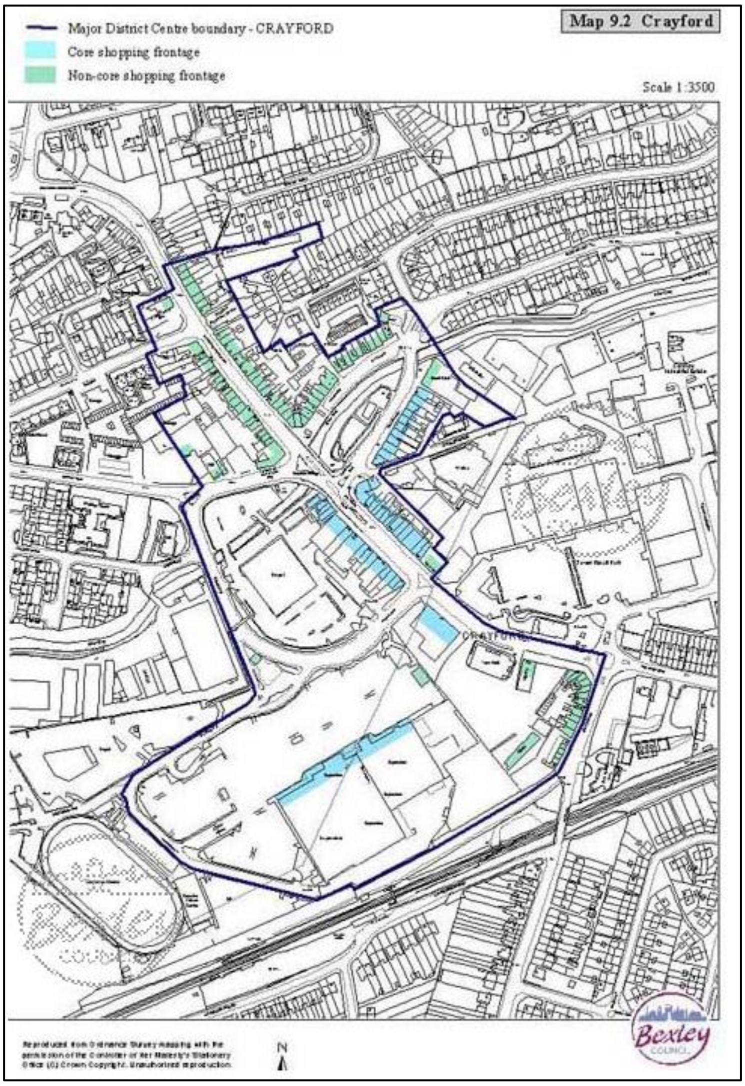
[17] The "evening" economy generally relates to all leisure activities that are open until around 11pm. The "night-time" economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend.

4 CRAYFORD HEALTH CHECK

4.1 Crayford is classified as a Major District Centre and is located in the east of the Borough; approximately 1.8 miles (2.8km) from Dartford; 2.4 miles (3.8km) from Erith; 5.0 miles (8.0km) from Bluewater; and 7.5 miles (12 km) from London City Airport. It is also designated as a District Centre in the London Plan.

4.2 As the figure below shows, the town has a traditional linear high street (including frontages along Crayford High Street and Crayford Road), along with Town Hall Square and adjacent Sainsbury's, and Crayford Island Retail Park. Although Tower Retail Park sits outside of the defined town centre boundary, the retail park effectively forms part of the centre. The centre is mainly surrounded by residential and industrial uses, as well as large areas of protected open space, including Green Belt and Metropolitan Open Land.

Figure 4.1: Crayford Town Centre



Source: Bexley Unitary Development Plan (2004). Map 9.2.

4.3 Crayford is characterised by three key retail areas:

- **Crayford Road** is the main shopping street that connects the town centre. Key secondary retailers and services are located here, including a post office, health and beauty services, retail services and multiples (including Iceland and Greggs).

- **Tower Retail Park** is located on the edge of Crayford Town Centre on Crayford Road. In 2018 it included key multiples such as Next, Curry's PC World, Boots, Hobbycraft and Pets at Home.
- **Crayford Island Retail Park** is located in the centre of Crayford and is accessed via the A207. Aldi is the key anchor retailer. These retail parks comprise the majority of the multiple offer within the Town Centre.

RETAIL COMPOSITION & DIVERSITY OF USES

4.4 The tables below show the changes in Crayford's outlets, floorspace and diversity of uses between 2011 and 2018.

Table 4.1: Current Retail and Service Offer – Units

Category	2011		2018		% Change: Outlets	UK Average (%) 2018
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	13	10.1%	12	9.4%	-7.7%	8.9%
Comparison	37	28.7%	33	25.8%	-10.8%	30.8%
Retail Service	25	19.4%	26	20.3%	4.0%	14.5%
Leisure Service	34	26.4%	35	27.3%	2.9%	23.9%
Financial & Business Service	5	3.9%	7	5.5%	40.0%	10.3%
Vacant	15	11.6%	15	11.7%	0.0%	11.2%
TOTAL	**129**	**100.0%**	**128**	**100.0%**	**-0.8%**	**100.0%**

Source: Experian Goad Category Reports - August 2011 and March 2018

Table 4.2: Current Retail and Service Offer – Floorspace

Category	2011		2018		% Change: Floorspace	UK Average (%) 2018
	Space	% of Total Space	Space	% of Total Space		
Convenience	12,087	30.7%	14,242	37.1%	17.8%	15.2%
Comparison	16,184	41.1%	12,022	31.3%	-25.7%	34.7%
Retail Service	2,713	6.9%	2,806	7.3%	3.4%	6.8%
Leisure Service	6,466	16.4%	6,559	17.1%	1.4%	25.1%
Financial & Business Service	595	1.5%	604	1.6%	1.5%	7.7%
Vacant	1,375	3.5%	2,165	5.6%	57.4%	9.8%
TOTAL	**39,420**	**100.0%**	**38,397**	**100.0%**	**-2.6%**	**100.0%**

Source: Experian Goad Category Reports - August 2011 and March 2018

4.5 The following provides a more detailed commentary on the centre's provision in 2018, and key changes since 2011.

Convenience Provision

4.6 Crayford had 12 convenience units in 2018, trading from a total floorspace of 14,242 sqm. The provision of outlets (9.4%) was slightly above the national average (8.9%), but floorspace provision (37.1%) was significantly above the UK average (15.2%). This reflects the fact that the centre's offer is anchored by a number of larger format stores, including Sainsbury's, Aldi and Iceland. Crayford's food and convenience provision was further supplemented in 2018 by 3 convenience stores, 3 off licences, 2 grocers, a baker, a frozen food store, a greengrocer and a supermarket. There had been an increase in floorspace (+17.8%) since 2011.

Comparison Provision

4.7 There were 33 comparison goods retailers in Crayford in 2018 trading from a total floorspace of 14,242 sqm. Although the representation of outlets (25.8%) was below the national average (30.8%), floorspace provision (37.1%), was above the national average of 34.7%. This is because the town's comparison offer is predominantly characterised by larger format units located in the retail parks, including Next, Sports Direct, Hobbycraft, Smyths Toys and Pets at Home. Crayford also had a good representation across the different comparison categories in 2018, including electrical goods, florists, newsagents, sports, camping and leisure goods and chemists. Although there had been a fall in comparison outlets and floorspace since 2011, Crayford had an adequate comparison representation that mainly comprises larger format stores in the Tower Retail Park.

Service Provision

4.8 There are 68 service outlets in Crayford. This represents 53.1% of all units, which is above the national average of 48.7%. However the floorspace provision (26.0%) is below the national average (39.6%). The following provides a brief summary of provision in the different service categories. In 2018 there were:

- 26 **retail services**. This represented 20.3% of total outlets, which was above the national average (14.5%). This category is mostly made up of health and beauty outlets (13 units); vehicle repairs and services (2 units); travel agents (2 units); dry cleaners (3 units); a post office; a filling station; a photo studio and an optician.
- 7 **financial services**. This represented 5.5% of total units and although this was below the national average of 10.3%, there had been an increase in units and floorspace since 2011.
- 35 **leisure services**. This represented 27.3% of total provision, which is higher than national average 24.0%. There had been a small increase in units and floorspace since 2011. Provision in 2018 included 6 restaurants, 5 cafés, 13 fast food takeaways and 4 public houses. Crayford Road is the main location for leisure services, particularly fast food outlets.

4.9 In summary, there was an adequate service provision in Crayford in 2018, with above average provision for retail and leisure services, but below average provision of financial services. There also appeared to be a qualitative gap in leisure services, specifically restaurants and bars that can have a positive impact on the evening and night-time economy.

VACANCY LEVELS

4.10 Crayford had 15 vacant outlets in 2018, which was the same as in 2011. This was equivalent to a vacancy level of 11.7%, which was slightly above the national average of 11.2%. The vacant floorspace (2,165 sqm) was equivalent to a vacant level of 5.6%, which was below the national average 9.8%. This suggests that many of the vacant units are small in terms of their floor areas. As for other centres it is important that the Council regularly monitors occupancy and vacancy levels across the centre in the light of the changing and dynamics trends in the retail market.

MULTIPLES AND INDEPENDENTS

4.11 There were some 28 retail and leisure multiples in Crayford in 2018 and these were predominantly located in the Tower Retail Park (e.g. Next, Sports Direct, Boots and Curry's/PC World).

Table 4.3: Multiple Retailers

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	14	50.0%	42.7%
Convenience	4	14.3%	11.2%
Retail Service	4	14.3%	9.2%
Leisure Service	6	21.4%	21.9%
Financial & Business Service	0	0.0%	15.0%
TOTAL	**28**	**100.0%**	**100.0%**

Source: Experian Goad

4.12 Outside of the Tower Retail Park the majority of Crayford's retail offer is characterised by smaller independents, and the key multiples include Sainsbury's and Iceland. The town's independent offer appears to be serving a complementary role to the retail park. It is important that the existing and new independent businesses are promoted and supported to ensure Crayford's future diversity, vitality and viability, alongside its larger format multiple offer.

MARKETS AND EVENTS

4.13 There were no regular/permanent markets operating in Crayford in 2018.

RETAIL DEMAND & REQUIREMENTS

4.14 There were only five operators with published requirements for Crayford in 2018, equivalent to a total floorspace of between 3,238 sqm and 8,826 sqm gross (see Table 1, Appendix A). The most notable operator seeking space at the time was Lidl. While there may be other unpublished requirements from retailer and leisure operators, the level published interest is expected for centre like Crayford. In the current retail market climate, any market demand from multiples for new store openings is more likely to be focused on larger and better performing centres.

PRIME ZONE A RENTS & YIELDS

4.15 Neither Prime Zone A Rents nor yields were available for Crayford.

SHOPPER PROFILE: HEADLINE RESULTS OF IN-CENTRE SURVEY

4.16 The following commentary sets out the headline results of the in-centre ("face-to-face") surveys conducted in Crayford (40 interviews) and Tower Retail Park (35) by NEMS between 8th - 16th June 2018. The full survey results and tabulations are set out in Volume 4.

Main reasons for visit

4.17 Respondents primarily visit Crayford for food and non-food shopping, and for other services, eating/drinking and socialising (see Table B3, Appendix B). In comparison a higher proportion of respondents visit Tower Retail for non-food shopping (52.0%) compared with Crayford (13%) (see Table B4, Appendix B). Respondents also visit Tower Retail Park for specific shops including Hobbycraft (4.0%), Currys PC World (2.0%), Smyths (2.0%), Boots (2.0%) and Sports Direct (2.0%). The retail park is a less important destination for food shopping, eating/drinking and socialising.

Spending Levels

4.18 Respondents were asked how much they spent or expected to spend in Crayford and Tower Hill Retail Park on the day of their trip. As the figure shows, there is higher spend on food and convenience goods in Crayford compared with the retail park, and a higher spend on comparison goods spend in the retail park. This reflects the retail composition and offer in the two different shopping locations, and the fact that there are no food or convenience stores in the retail park. The survey results also confirm the important role of the town's food stores (including Sainsbury's) in attracting shopping trips and expenditure to Crayford.

Figure 4.1: Spending levels in Crayford and Tower Retail Park

4.19 However, the survey results also show that those interviewed at the retail park did not generally visit or spend money on food and convenience items as part of their shopping trip. This suggests there is an opportunity to promote stronger linkages between the retail park and town centre to encourage linked trips and spend

4.20 Respondents were also asked what they had purchased or intended to purchase in Crayford and the retail park on the day of their trip.

Table 4.4: Spending pattern in Crayford and Tower Retail Park

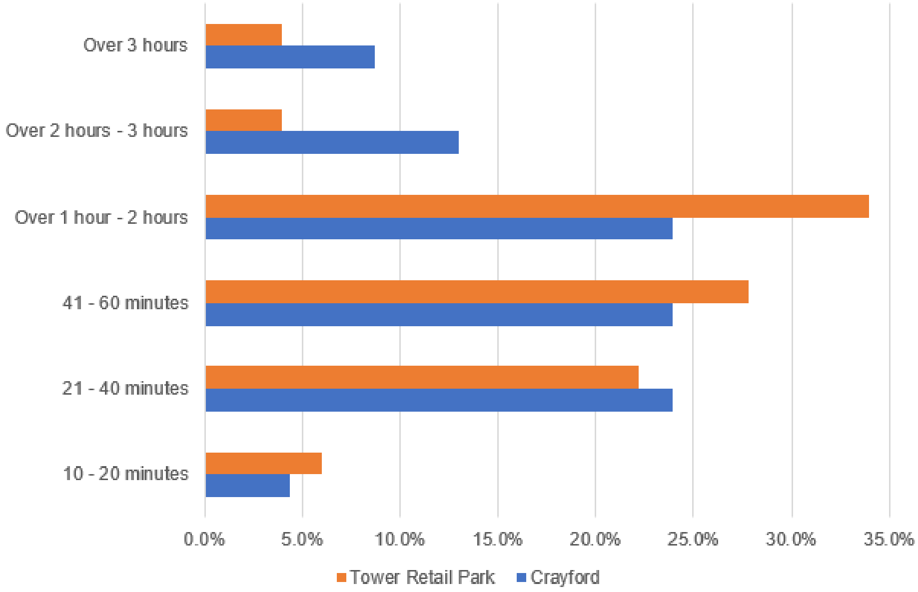
Crayford	Tower Retail Park
▪ Eating and drinking out - 58.7% ▪ Nothing - 17.3% ▪ Medical goods - 13.0% ▪ Retail services - 6.5% ▪ Games, toys, sport and music - 4.3% ▪ Audio visual and photographic equipment - 2.1% ▪ Clothes and shoes - 2.1% ▪ Newspaper / stationery - 2.1% ▪ Don't know - 2.1%	▪ Clothes and shoes - 24.0% ▪ Don't know - 24.0% ▪ Games, toys, sport and music - 16.0% ▪ Medical goods - 16.0% ▪ Eating and drinking out - 14.0% ▪ Gifts, jewellery, glass, watches - 8.0% ▪ Pets and related products - 8.0% ▪ Electrical and household appliances - 6.0% ▪ Hardware and DIY - 6.0% ▪ Newspaper / stationery - 4.0%

4.21 As the table shows, a higher proportion of respondents are eating/drinking out in Crayford (58.7%), compared with the retail park (14.0%). It also confirms that a more people purchase non-food goods at the retail park than in the rest of the town centre.

Dwell Times

4.22 In terms of dwell times, the majority of respondents spend less than one hour in the retail park and wider town centre. A higher proportion spend on average between 1–2 hours in Tower Hill Retail Park (34%) than in the rest of Crayford (23.9%), but more respondents spend over 2 hours in the town.

Figure 4.2: Length of stay



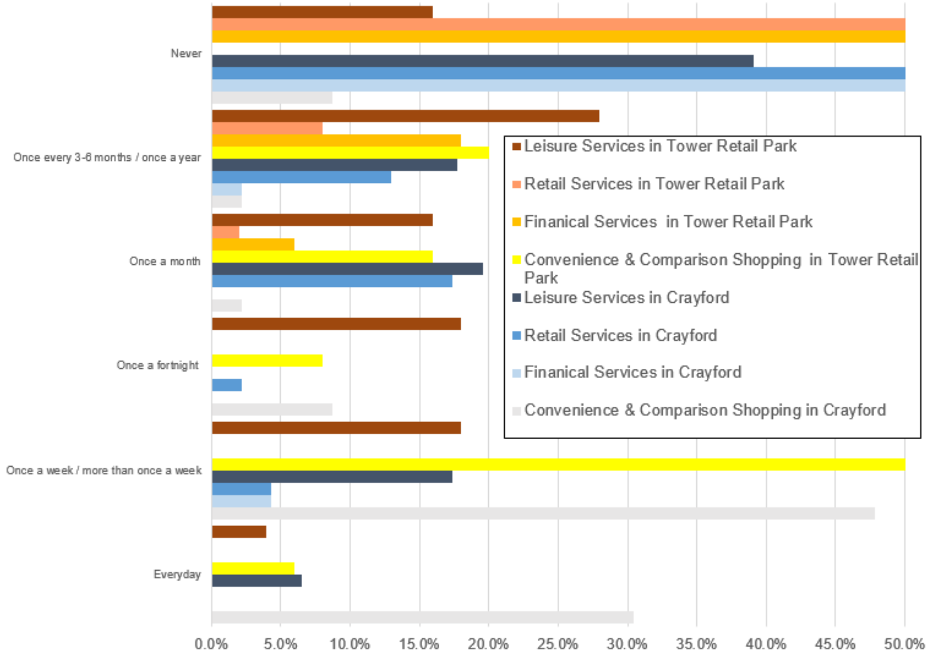
Frequency of Visits

4.23 Respondents were asked how often they visit Crayford and Tower Retail Park during the day for (convenience and comparison) shopping and for retail, financial and leisure services[18]. As the figure shows, a significant proportion of respondents interviewed in Crayford (78.3%) visit the town centre regularly for convenience and comparison shopping (i.e. at least once a week). Respondents in Crayford also tend to visit the town once a month for retail services (17.4%) and leisure services (19.5%). However, a significant proportion of respondents in Crayford do not visit for financial services (93.5%).

4.24 In contrast a high proportion of those interviewed at Tower Retail Park do not visit the retail park for financial (74%) and retail services (88%). Respondents who do visit the retail park for leisure services visit either at least once a week (18%), once a fortnight (18%), or at least twice a year (28%). Half of all respondents visit the retail park for (convenience and comparison) shopping at least once a week, 16% once a month, and 20% visit once or twice a year.

[18] A 0.0% response rate was recorded for leisure and cultural activities.

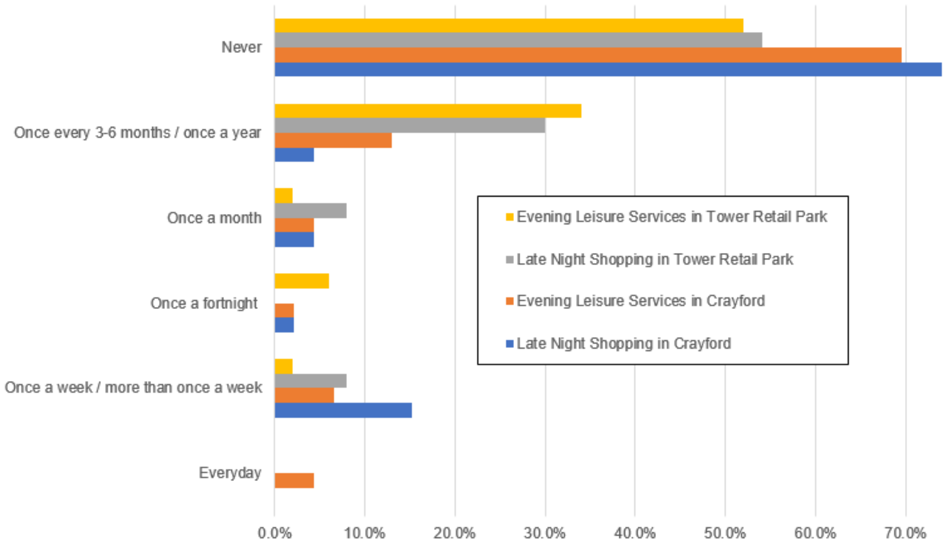
Figure 4.3: Frequency of visits during the day in Crayford and Tower Retail Park



Evening and Night Time Economy

4.25 Respondents were also asked how often they visit Crayford and Tower Retail Park during the evening for convenience and comparison shopping (after 5pm) and leisure services[19]. As the figure shows, a significant proportion of respondents never visit Crayford or Tower Retail Park for evening leisure services or late night shopping. Of the respondents who do, the majority visit once every 3-6 months or once a year. Crayford attracts more respondents at least once a week (21.7%) compared with the retail park (10.0%). These results suggest that improvements should be made to provide a more attractive evening economy at both Crayford and Tower Retail Park.

Figure 4.4: Frequency of visits during the evening in Crayford and Tower Retail Park

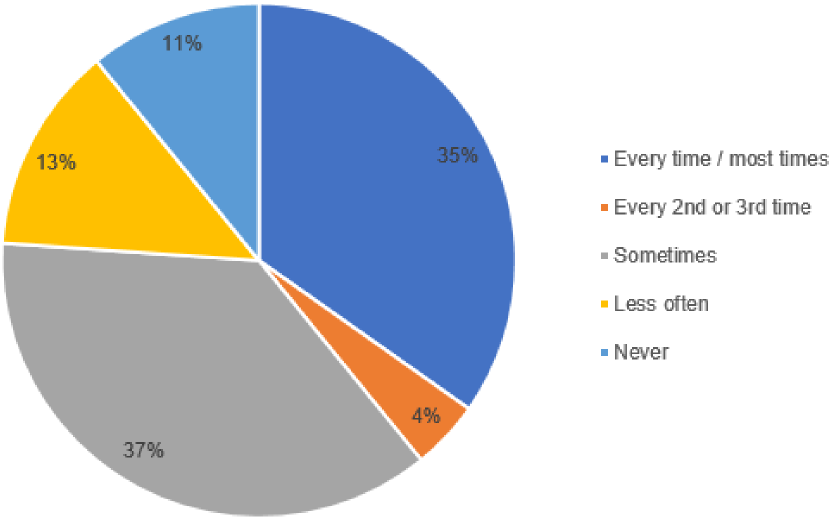


[19] No respondents visited for financial and retail services, or for leisure and cultural activities.

Crayford and Tower Retail Park - Linked Trips

4.26 The figure shows that 35% of respondents always combine their trips to the retail park and rest of the town centre, 11% never combine trips, and 50% indicated that they visit both shopping locations on the same trip either *"less often*" or "*sometimes*".

Figure 4.5: Frequency of Linked Trips between Crayford Town Centre and Tower Retail Park



Most popular stores

4.27 The following lists the top ten most popular stores visited in Crayford and the Tower Retail Park on the days of the interview in 2018.

Table 4.5: Top retailers respondents visit in Crayford and Tower Retail Park

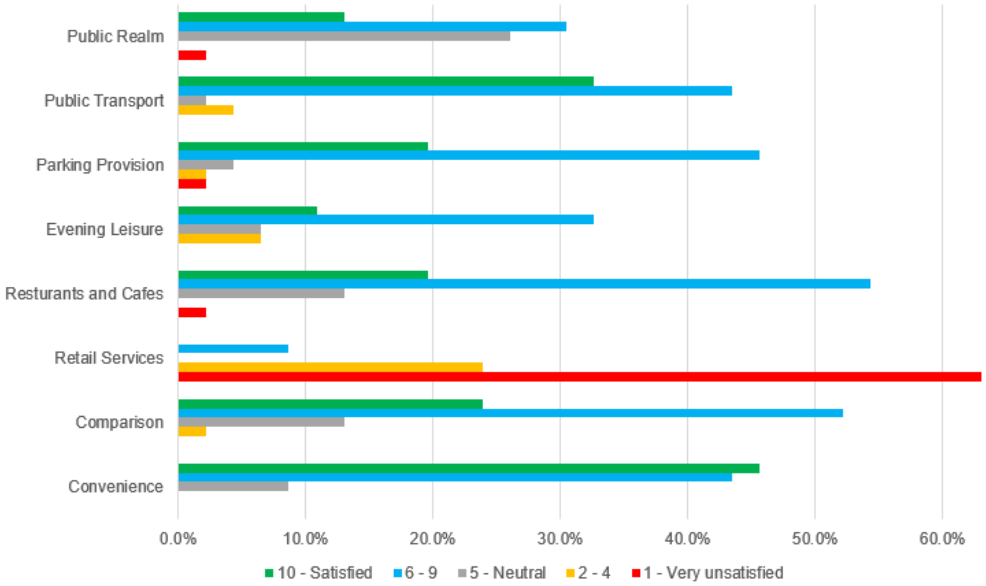
Tower Retail Park	Crayford
▪ Boots, Tower Retail Park -14.0% ▪ Next, Tower Retail Park -12.0% ▪ Hobbycraft, Tower Retail Park - 12.0% ▪ Currys PC World, Tower Retail Park - 10.0% ▪ Poundland, Tower Retail Park - 10.0% ▪ Sports Direct, Tower Retail Park -10.0% ▪ Smyths Toys, Tower Retail Park - 6.0% ▪ Costa Coffee, Tower Retail Park - 6.0% ▪ McDonalds, Tower Retail Park - 6.0% ▪ Don't know / none - 6.0% ▪ TUI - 4.0%	▪ Sainsbury's, Townhall Square - 30.4% ▪ Don't know / none - 23.9% ▪ Iceland, Crayford Road - 21.7% ▪ Aldi, Roman Way - 8.7% ▪ Hair salons/beauty salons (various) - 6.5% ▪ Post Office, Crayford Road - 2.2% ▪ Crayford Library, Town Hall Square - 2.2% ▪ Florists (various) - 2.2% ▪ Newsagents (various) -2.2%

4.28 As the table shows, the majority of respondents visited the main food/convenience stores in Crayford (principally Sainsbury's, Iceland and Aldi), or other services. At Tower Retail Park the top destinations were Boots, Next, Hobbycraft, Currys/PC World, Poundland and Sports Direct.

Satisfaction Levels

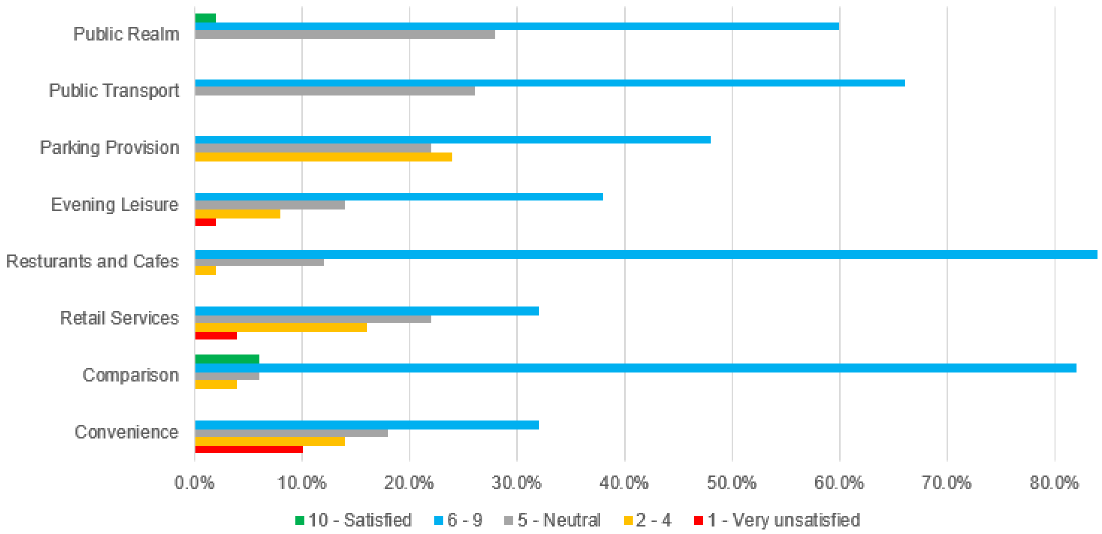
4.29 Respondents were asked how satisfied they are with Crayford's and Tower Retail Park's key facilities and attractions on a scale of 1 (very unsatisfied) to 10 (satisfied).

Figure 4.6: Satisfaction levels across Crayford



4.30 As the figure shows, respondents are mostly satisfied (answer of 10) with the Crayford's food/convenience offer (45.6%) and least satisfied (answer of 1) with its the retail services (63.0%). Overall, respondents are satisfied with Crayford; with the majority of responses recording 5 or above.

Figure 4.7: Satisfaction levels across Tower Retail Park



4.31 For Tower Retail Park respondents were mostly satisfied (answer between 6-9) with the comparison offer (45.6%) and least satisfied (answer of 1) with the retail services (4.0%). Overall respondents are generally satisfied with the retail parks, with the majority of responses recording 5 or above.

Suggested Improvements

4.32 Respondents were asked which retailers they would like to see in Crayford and Tower Retail Park that would encourage them to visit more often.

Table 4.6: Top retailers respondents would like in Crayford and Tower Retail Park

Tower Retail Park	Crayford
▪ Marks & Spencer - 8.00%	▪ Wetherspoons - 8.70%
▪ Independent clothes shops - 6.00%	▪ Marks & Spencer - 6.52%
▪ Asda - 4.00%	▪ Primark - 6.52%
▪ Primark - 4.00%	▪ Any Bank - 4.35%
▪ Starbucks - 4.00%	▪ Wilko - 3.35%
▪ TK Maxx - 4.00%	▪ B&M - 2.17%
▪ Boss - 2.00%	▪ Butchers - 2.17%
▪ Burger King - 2.00%	▪ Health shop - 2.17%
▪ Butchers - 2.00%	▪ Independent clothes- 2.17%
▪ Café Nero - 2.00%	

4.33 A large proportion of respondents did not mention anything in particular (80.4%), or could not think of anything (8.7%). Of those that did respond, a higher proportion at the retail park identified the need for M&S, independent clothes shops, Asda and Primark. In the town centre respondents called for a Wetherspoons pub, M&S, Primark and a high street bank.

Key Focal/Meeting Points in Crayford

4.34 Respondents were asked where they would typically meet up with a friend and at which point they feel like they have left the town centre. As the figure shows, a large proportion of respondents typically meet up with their friends within the centre of town and near key multiples in the retail park.

Figure 4.8: Key focal/meeting points in Crayford and Tower Retail Park

Key

A point where respondents feel they have left the town centre

A point where respondents meet up with their friends

4.35 When asked where they felt they had left the town centre, most identified edge-of-centre locations, such as the train station, the top of the hill and Crayford Arms Pub.

CUSTOMER VIEWS & PERCEPTIONS - HOUSEHOLD SURVEY

4.36 To help understand the overall attraction and performance of Crayford from a retail and leisure perspective, the 2018 household telephone interview survey (HTIS) asked respondents how often they visited the centre, what they "*liked"* about Crayford, and what "improvements" would potentially make them visit the town more than they currently do.

4.37 Of those that visit Crayford for non-food shopping and/or leisure reasons, a relatively high proportion (67.4%) across the Catchment Area (Zones 1-8) visited the centre at least once a week (see Table C4, Appendix C). This increased to 84.9% within Crayford's "core" survey zone (i.e. Zone 5). The survey results also show that only a relatively small proportion of respondents "never" visit Crayford (just 2% in Crayford's "core" zone).

4.38 The majority of respondents like Crayford because it is close to where they live (see Table C5, Appendix C). Other positive aspects include the good choice of non-food shops and high street retailers, the fact that it is easy to find a parking space, and the attractive environment.

4.39 In response to what improvements would encourage respondents to visit Crayford more than they currently do, a high proportion of respondents indicated "nothing" (see Table C6, Appendix C). Others mainly identified the need for more comparison, high street and independent shops.

ENVIRONMENTAL QUALITY

4.40 At the time of the audit in 2018 Crayford was identified as having a relatively attractive environmental quality along the High Street, which was well kept and tidy. The planting at the Tower Retail Park car park helps to break up the buildings and concrete surface parking. The Town Hall also acts as an architectural landmark and focus for the town centre due to its location around Tower Retail Park, the large Sainsbury's supermarket and the High Street.

4.41 However, there is a lack of uniformity across the town centre. The High Street, Tower Retail Park, the large Sainsbury's and the Aldi store do not comfortably merge with one another to provide a coherent environment. As a result, the town centre as a whole lacks identity and character. Signage should also be addressed.

4.42 Discussions with the representative for Tower Retail Park also highlighted that traffic congestion across the town centre is perceived as an issue from tenants, particularly where road works are taking place.

ACCESSIBILITY

4.43 Crayford has a PTAL rating of 3. The nearest train station is an 8 minute walk from the centre of the town and provides regular connections to London's Charing Cross and Cannon Street stations, as well as to Gravesend and Barnehurst. There are also three buses route that connect the town with surrounding areas, and the main bus stops are located outside the post office (see Table 2a, Appendix B).

4.44 The town centre benefits from good connectivity by road; the A2 provides links to Greater London and the M25. Connections to the A220 also provides further links to Dartford and Bluewater Shopping Centre.

4.45 Crayford also has a good provision of car parking (see Table 2b, Appendix B). There are 1,148 spaces in the town's four main car parks - Tower Retail Park (390 spaces), Crayford Island Retail Park (156 spaces), Sainsbury's (477 spaces) and the Station (125 spaces)

4.46 Accessibility by different modes of travel to Crayford is therefore good overall. In terms of investment and development, it will be important to maintain an appropriate level of car parking to ensure the centre remains accessible to shoppers and visitors.

SUMMARY

4.47 The table below summarises the key SWOTs for Crayford based on the healthcheck conducted in 2018:

STRENGTHS	OPPORTUNITIES
▪ Classified as a Major District Centre in the adopted plan, and a District Centre in the London Plan. ▪ Has a relatively good food and convenience provision - anchored by Sainsbury's, Aldi and Iceland food stores. ▪ Good comparison offer - Tower Retail Park is a major generator of trips and spend, and accommodates a number of major comparison multiples in larger format units. ▪ Tower Retail Park serve the needs of both Crayford's local catchment, and car-borne shoppers living within and outside Bexley Borough. ▪ Good service provision in terms of retail and leisure services. ▪ Good accessibility throughout the centre in terms of pedestrian flows and public transport. ▪ A train station at the edge of the town, with connections to both London and Kent.	▪ Potential to introduce more leisure services on Crayford Road to complement Tower Retail Park. ▪ Opportunities to promote better linkages between Tower Retail Park and the rest of the town centre to help promote linked trips and expenditure, and longer dwell times. ▪ Potential for better signage and wayfinding. ▪ Potential for a market. ▪ Potential to improve the town centre environment. ▪ Introduce more residential and flexible uses in the town centre.
WEAKNESSES	**THREATS**
▪ Disconnection between Tower Retail Park and the rest of the town centre. ▪ The 15 vacant outlets in 2018 represented a vacancy level of 11.7%, which was above the national average (11.2%). ▪ Vacancies were mainly concentrated in smaller units in more secondary locations/streets. ▪ Under provision of financial services (no banks). ▪ No street or covered market. ▪ Limited evening and night-time economy. ▪ Poor cycling infrastructure and lack of bike parking ▪ Traffic congestion and noise is perceived as an issue, particularly from the A207 and when roadworks are taking place. ▪ The town centre as a whole lacks identity and character – poor public realm in places and lack of green spaces.	▪ Investment in Bluewater and other competing shopping and leisure destinations. ▪ The growth of online shopping and leisure activities. ▪ The long term impacts of the pandemic on the viability of retail, leisure and other town centre business leading to closures – potential threat to larger format stores in the retail park. ▪ A rise in vacancy levels and fall in trips and footfall. ▪ The potential impact of new PDR allowing changes from Class E (including shops) to residential (Class C3) outside of planning controls.

4.48 In summary, Crayford is a relatively healthy centre based on its KPIs. The high profile multiples in the Tower Retail Park are a major draw, and its food offer is anchored Sainsbury's and Aldi. Crayford's main weaknesses are its poor environment, high levels of traffic, poor connections between the different parts of the centre, and the lack of a distinct identity and character.

4.49 The poor linkages throughout the centre - and specifically the links between the Tower Retail Park and the centre's other shops, businesses and facilities - mean that it is not capturing the additional benefits of linked trips, footfall and expenditure. Providing better linkages, signage and wayfinding would help to increase "dwell times" and benefit the overall town centre economy.

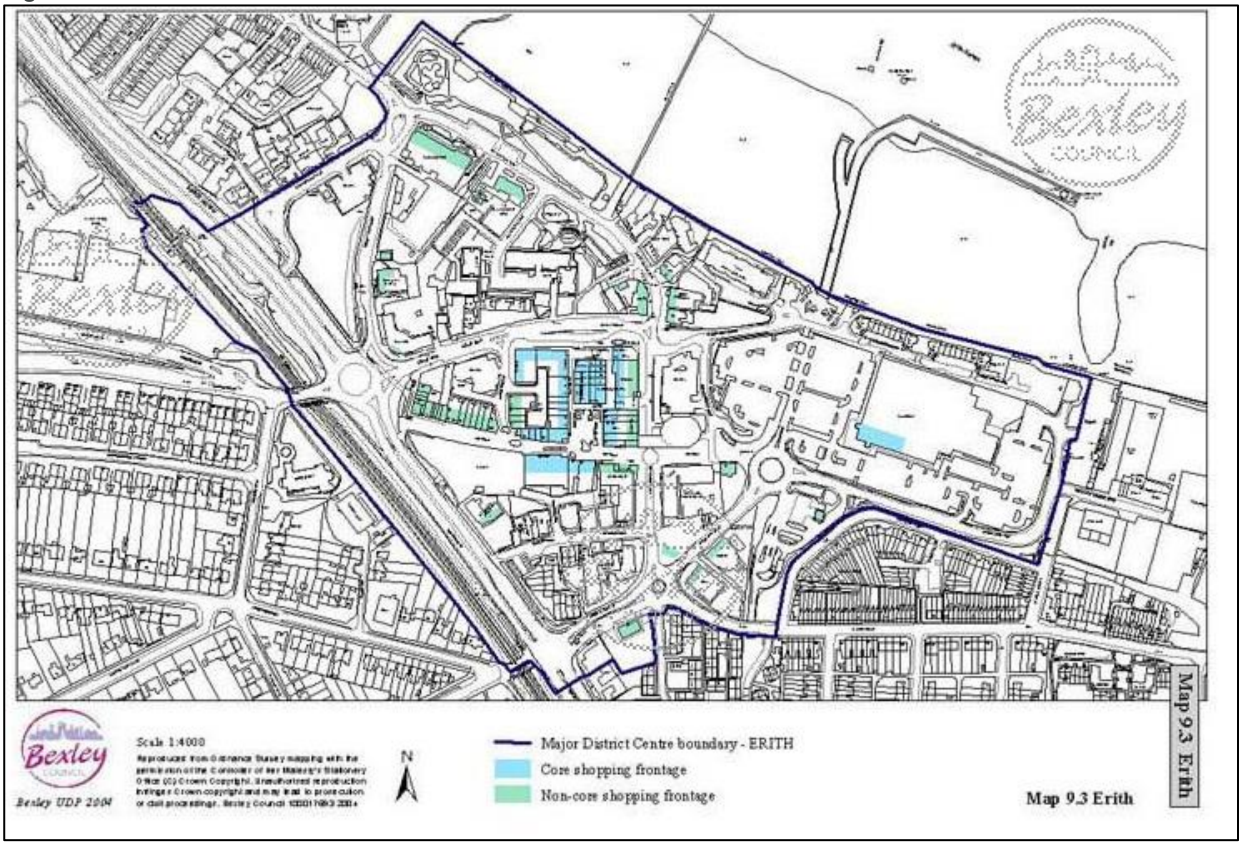
4.50 Like the Borough's other centres, Crayford is vulnerable to competition from other shopping locations and the growth in online retailing. It is also heavily reliant on the multiples in the Tower Retail Park. In this context there is a needed to diversify its retail, leisure and town centre uses, and provide more flexible space to help build greater resilience into its overall offer, vitality and viability.

5 ERITH HEALTH CHECK

5.1 Erith is a classified as a Major District Centre in the Local Plan Erith (as a District Centre in the London Plan). It is located to the north of the Borough, on the south bank of the River Thames, approximately 1.5 miles (2.4km) from Belvedere; 3.3 miles (5.3km) from Abbey Wood; 4.1 miles (6.5km) from Thamesmead; and 7.1 miles (11.4 km) from Bluewater Shopping Centre.

5.2 The figure below shows that the main retail area is located west of the A206, focussed in the Riverside Shopping Centre, which is approximately a 5-8 minute walk from the train station. The town is surrounded by industrial and residential uses.

Figure 5.1: Erith Town Centre



Source: Bexley Unitary Development Plan (2004). Map 9.3

CENTRE RANKING, COMPOSITION & DIVERSITY OF USES

5.3 Erith was ranked 1,276th in the Javelin VENUESCORE rankings in 2017, and had experienced a fall in its ranking from 1,118th in 2014. The table below summarises the changes in the scale, mix and diversity of uses in Erith since 2012 based on the Experian Goad Category Reports.

Table 5.1: Current Retail and Service Offer – Units

Category	2012 No. of Outlets	2012 % of Total Outlets	2018 No. of Outlets	2018 % of Total Outlets	% Change: Outlets	UK Average (%) 2018
Convenience	8	11.0%	9	12.5%	12.5%	8.9%
Comparison	23	31.5%	21	29.2%	-8.7%	30.8%
Retail Service	13	17.8%	14	19.4%	7.7%	14.5%
Leisure Service	13	17.8%	17	23.6%	30.8%	23.9%
Financial & Business Service	8	11.0%	6	8.3%	-25.0%	10.3%
Vacant	8	11.0%	5	6.9%	-37.5%	11.2%
TOTAL	**73**	**100.0%**	**72**	**100.0%**	**-1.4%**	**100.0%**

Source: Experian Goad Category Reports - January 2012 and January 2018

Table 5.2: Current Retail and Service Offer – Floorspace

Category	2012 Space	2012 % of Total Space	2018 Space	2018 % of Total Space	% Change: Floorspace	UK Average (%) 2018
Convenience	9,402	33.4%	9,978	36.1%	6.1%	15.2%
Comparison	11,148	39.6%	9,885	35.7%	-11.3%	34.7%
Retail Service	1,236	4.4%	1,152	4.2%	-6.8%	6.8%
Leisure Service	2,137	7.6%	4,422	16.0%	106.9%	25.1%
Financial & Business Service	1,524	5.4%	1,078	3.9%	-29.3%	7.7%
Vacant	2,694	9.6%	1,161	4.2%	-56.9%	9.8%
TOTAL	**28,141**	**100.0%**	**27,676**	**100.0%**	**-1.7%**	**100.0%**

Source: Experian Goad Category Reports - January 2012 and January 2018

Convenience Provision

5.4 There were nine convenience units in 2018, trading from a total floorspace of 9,978 sqm gross. Total outlet provision (12.5%) was above the national average of (8.9%), and floorspace provision (36.1%) was significantly above the UK average (15.2%). The reflects the provision of larger anchor food stores in the centre, including Morrisons. Erith's food and convenience provision is further supplemented by Iceland and a number of smaller retailers, including a baker, convenience store, a greengrocers, and a health food store (Holland and Barrett).

Comparison Provision

5.5 There were 21 comparison goods retailers in 2018, trading from a total floorspace of 9,885 sqm. The outlet provision (29.2%) was slightly below the national average (30.8%), but floorspace provision (35.7%) was slightly above the UK average (34.7%). In terms of its overall non-food provision Erith had a relatively good representation of shops selling clothing and fashion; hardware and household goods; sports, camping and leisure goods; toiletries, cosmetics and beauty products; and a catalogue showroom.

Service Provision

5.6 There were 37 service outlets in Erith in 2018. This represented 51.4% of all units in the centre, which was above the national average of 48.8%. Floorspace provision (24.0%) was below the national average (39.6%), which indicates that the centre's service offer mainly comprises smaller format outlets. In terms of the distribution of service uses in 2018, there were:

- 14 **retail services**. This represented 19.4% of total outlets, which was slightly above the national average (14.5%). This category was mostly made up of health and beauty outlets (8 units); opticians

(2 units); a dry cleaners and a post office. There had been an increase in units between 2011-18, but a reduction in floorspace.

- 6 **financial services**. This represented 8.3% of total units and was below the national average of 10.3%. Since 2011 there had been a decrease in the number financial services and floorspace. This category included two retail banks in 2018.
- 17 **leisure services**. This represented 23.6% of total outlets in 2018, which was broadly equivalent to the national average 23.9%. There had been an increase in units and floorspace since 2011. Leisure provision consisted of 2 restaurants, 2 cafés, 7 fast food takeaways, a public house, 2 sports and leisure facilities, 2 casinos and betting offices, and a theatre.

VACANCY LEVELS

5.7 Erith had five vacant outlets in 2018. This was equivalent to a vacancy level of 6.9%, which was well below the national average of 11.2%. The vacant floorspace (1,161 sqm) represented 4.2% of the total floorspace, which was also below the national average of 9.8%. Vacancies in the centre have declined since 2011.

5.8 The centre appeared to be performing relatively well in 2018 based on its low vacancy level. The majority of vacancies were located outside of the shopping centre, and the majority were in the Council's ownership. The Council should frequently monitor vacancies across the centre in the light of the changing and dynamic trends in the retail market.

MULTIPLES AND INDEPENDENTS

5.9 There were some 28 multiple retailers in Erith in 2018. This included key multiple brands such as Argos, Wilko, Matalan and Barclays. Multiples account for 38.3% of the total units, with independents representing 61.7% of total units.

Table 5.3: Multiple Retailers

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	8	28.6%	42.7%
Convenience	6	21.4%	11.2%
Retail Service	4	14.3%	9.2%
Leisure Service	9	32.1%	21.9%
Financial & Business Service	1	3.6%	15.0%
TOTAL	**28**	**100.0%**	**100.0%**

5.10 There was a good and diverse mix of multiple and independent retailers, serving the centre and its catchment population.

MARKETS AND EVENTS

5.11 There were no regular/permanent markets operating in Erith in 2018. However, the Council had facilitated a pop-up food market on the Riverside in 2017/18, which received positive feedback from the public. There may therefore be scope to introduce a more regular market as part of regeneration proposals for the centre.

RETAIL DEMAND & REQUIREMENTS

5.12 There were only four operators with published requirements for Erith in 2018, equivalent to a total floorspace of between 762 sqm and 5,574 sqm gross (see Table 3, Appendix A).

PRIME ZONE A RENTS & YIELDS

5.13 Neither Prime Zone A Rents nor yields were available for Erith.

SHOPPER PROFILE: HEADLINE RESULTS OF IN-CENTRE SURVEY

5.14 The following commentary sets out the headline results of the 75 in-centre ("face-to-face") surveys conducted in Erith by NEMS between Friday 8th June and Saturday 16th June 2018 (see Appendix ? for the full survey results and tabulations).

Main reasons for visit

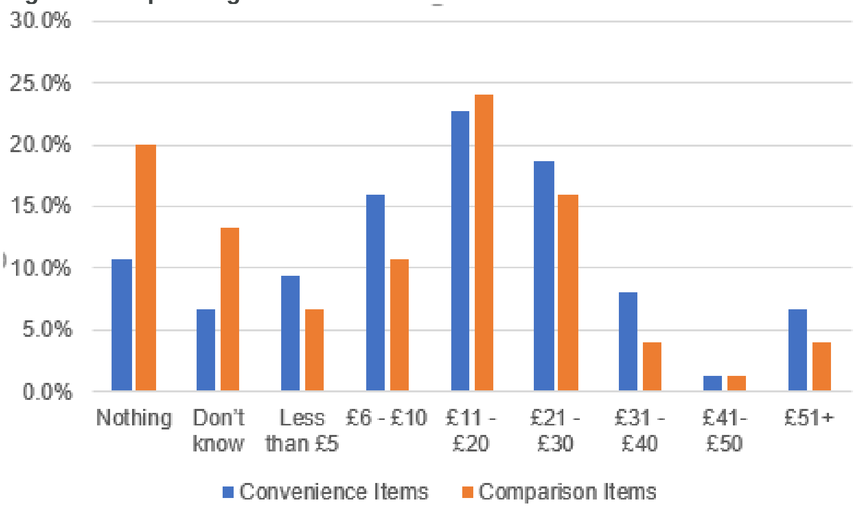
5.15 The main reason why respondents visit Erith is for food shopping (50.7%), non-food shopping (28.0%), and for personal services (13.3%) (see Table B5, Appendix B). Other secondary reasons include for browsing (18.6%), window shopping (5.3%) and eating/drinking out (2.6%).

5.16 Respondents were asked why they visit Erith over other centres in the Borough (see Table B6, Appendix B). The main reasons included the fact Erith is close to home (65.3%), to visit a particular service (8.0%) and because Erith is close to friends and relatives (6.7%).

Spending Levels

5.17 As the figure shows, respondents typically spend between £11.00 - £20.00 on comparison (24.0%) and convenience (23.0%) goods. Overall there is a slightly higher spend on convenience goods; with 6.6% of respondents spending over £51.00 on convenience goods.

Figure 5.2: Spending levels in Erith



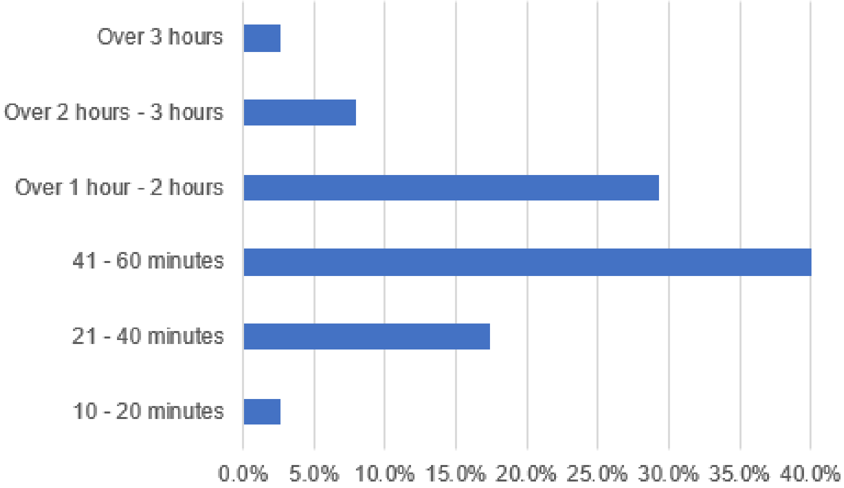
5.18 Those interviewed were also asked what they had purchased or intend to purchase in Erith on the day of their visits. Respondents mainly visited for food and drink at bars and pubs (68.0%), medical goods (20.0%) and clothes and shoes (16.0%).

- Eating and drinking out – 68.0%
- Medical goods – 20.0%
- Clothes and shoes – 16.0%
- Hardware and DIY – 10.6%
- Pets and related products – 9.3%
- Games, toys, sport and music – 6.6%
- Newspaper / stationery – 6.6%
- Furniture / furnishings – 5.3%
- Retail services – 4.0%

Length of Stay

5.19 In terms of dwell times, the majority of respondents typically spend 41–60 minutes (40.0%) in Erith, or 1–2 hours (29.3%). A smaller proportion stayed in the centre for more than two hours.

Figure 5.3: Length of stay

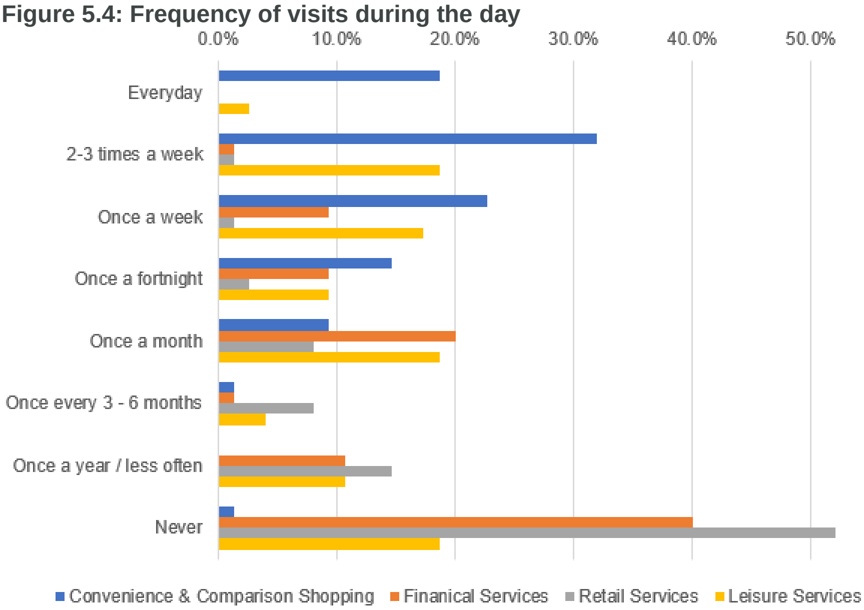


Frequency of Visits

5.20 Respondents were then asked how often they visit Erith during the day for convenience and comparison shopping; and retail, financial and leisure services[20].

5.21 As the figure shows, a higher proportion of respondents visit Erith for convenience and comparison shopping either 2-3 times a week (32.0%), once a week (22.6%) or everyday (18.6%). Respondents mainly visit Erith 2-3 times a week for leisure services (18.6%), once a month for financial services (20.0%) and once a year for retail services (14.6%). However, a significant proportion of respondents never visit Erith for retail services (52.0%), financial services (40.0%) or leisure services (18.6%).

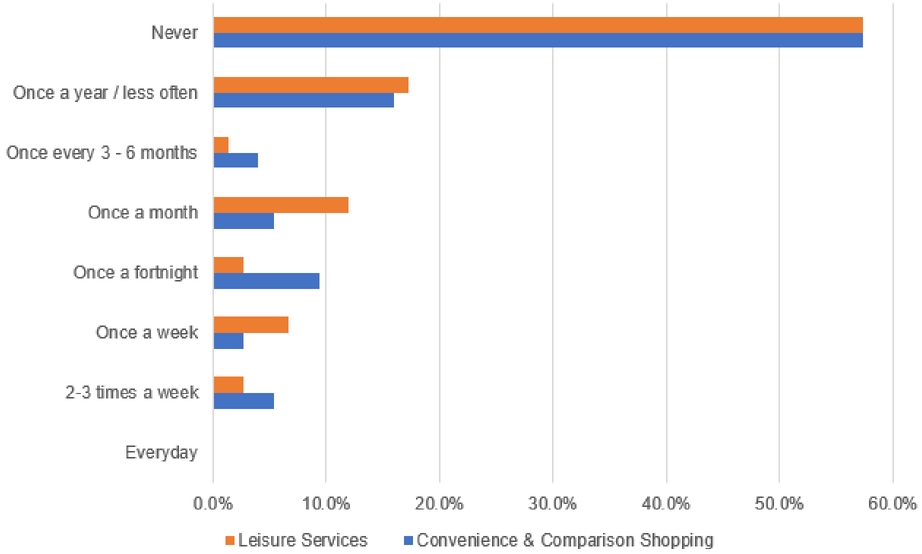
Figure 5.4: Frequency of visits during the day



[20] A 0.0% response rate was recorded for leisure and cultural activities.

5.22 Respondents were also asked how often they visit Erith during the evening for convenience and comparison shopping (after 5pm) and leisure services[21].

Figure 5.5: Frequency of visits during the evening



5.23 A significant proportion of respondents never visit Erith for leisure services (57.3%), or for convenience and comparison shopping (57.3%). Typically, respondents visit Erith during the evening once a year / less often for leisure services (17.3%) and convenience and comparison shopping (16.0%).

5.24 The ten most popular stores identified by respondents to the survey are:

- Wilko, Riverside SC - 30.7%
- Iceland, Riverside - 17.3%
- Morrison's, James Watt Way - 16.0%
- Matalan, Riverside - 9.3%
- Savers, Riverside - 4.0%
- Card Factory, Riverside - 2.7%
- Greggs, Riverside - 2.7%
- Specsavers, Riverside - 1.3%
- Holland and Barrett, Riverside - 1.3%
- Farm Foods, Riverside - 1.3%

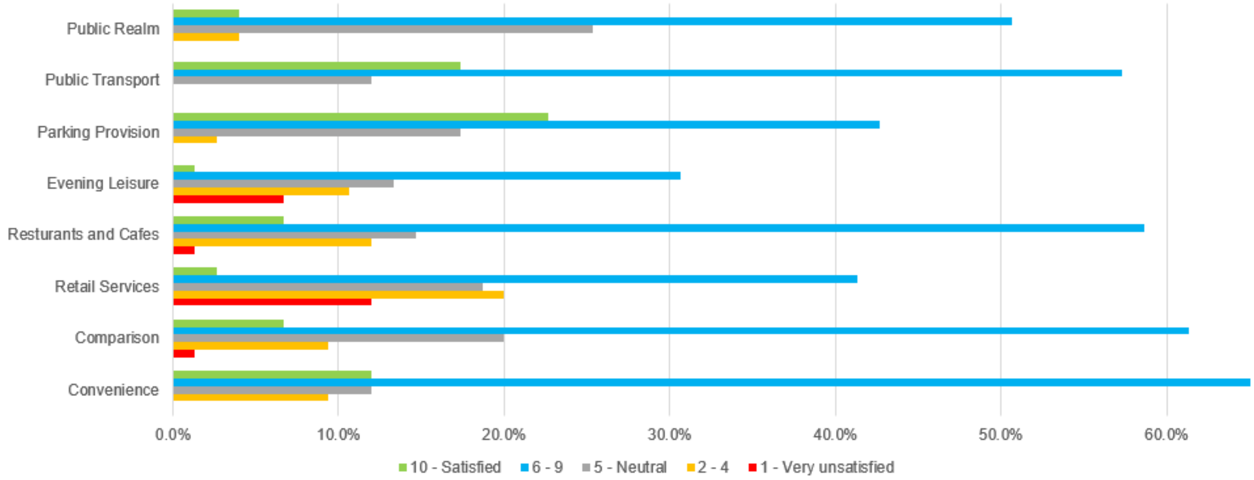
Satisfaction Levels

5.25 Respondents were asked how satisfied they are on a range of aspects within Erith on a scale of 1 (very unsatisfied) to 10 (satisfied).

5.26 As the figure show, respondents were moderately satisfied (answer ranging from 6 – 9) with each aspect in Erith. Respondents were mostly satisfied (answer of 10) with the public transport (17.3%) and least satisfied (answer of 1) with the retail services (12.0%). Overall however, respondents are satisfied with Erith with the majority of responses recording 5 or above.

[21] A 0.0% response rate was recorded for financial and retail services and leisure and cultural activities.

Figure 5.6: Satisfaction levels across Erith

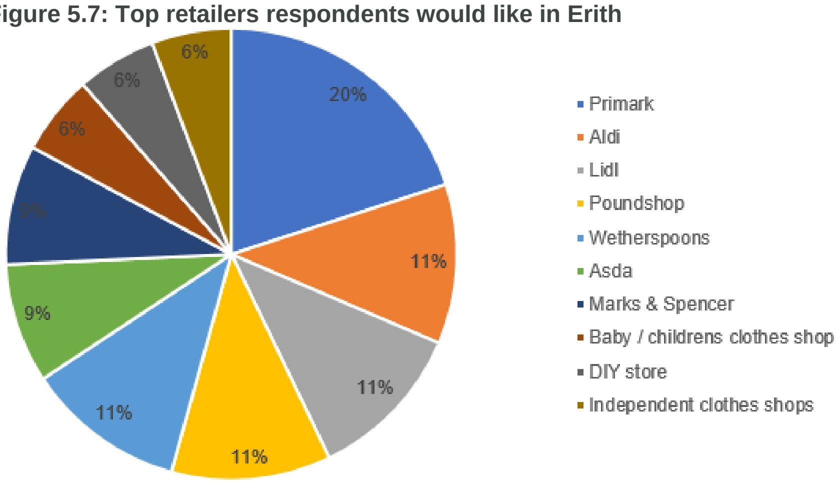


Improvements

5.27 Respondents were asked which retailers they would like to see in Erith that would encourage them to visit more often.

5.28 As the figure shows, a significant proportion of respondents would like to see discount operators such as Primark, Aldi and Lidl in Erith. Other multiples identified included M&S and Asda, as well as other comparison outlets and independent retailers.

Figure 5.7: Top retailers respondents would like in Erith



5.29 Those interviewed were also asked what other town centre uses would encourage them to visit Erith more often. The responses below show that respondents wanted more shops comparison stores, along with leisure facilities (1.3%) and retail services (1.3%).

- Women's fashion stores - 12.0%
- Homeware stores -10.7%
- DIY, gardening stores - 2.7%
- Children's wear stores - 1.3%
- Carpet and furniture stores. - 1.3%
- Newsagents, florists, laundrettes, shoe repairs, etc. - 1.3%
- Leisure facilities - 1.3%

5.30 Respondents were asked where they would typically meet up with a friend in Erith, and where they feel they have left the town centre. As the figure below shows, a high proportion of respondents typically meet up in the centre of town and in the Riverside Shopping Centre. When asked were respondents feel they have left the town centre, a mix of edge-of-centre locations were recorded such as the roundabout, Queen's Road and Morrisons.

Figure 5.8: Key focal/meeting/exit points in Erith

Key

A point where respondents feel they have left the town centre

A point where respondents meet up with their friends

CUSTOMER VIEWS & PERCEPTIONS - HOUSEHOLD SURVEY

5.31 To help understand the overall attraction and performance of Erith from a retail and leisure perspective, the 2018 household telephone interview survey (HTIS) asked respondents how often they visited the centre, what they "*liked"* about Erith, and what "improvements" would potentially make them visit the town more than they currently do. The results are summarised in Appendix C, Tables C7-9.

5.32 Of those that visit Erith for non-food shopping or leisure reasons, some 40.8% across the wider Catchment Area (Zones 1-8) visited the centre at least once a week. This increased to 44.4% within Erith's "core" survey zone (i.e. Zone 2). However, a relatively high proportion of respondents (19%) in Erith's "core" zone also stated that they "never" visit the centre for shopping or other purposes.

5.33 The majority of respondents "liked" the fact that Erith is close to where they live. Other positive aspects include the good range of non-food shops and the ease of parking.

5.34 In response to what improvements would encourage respondents to visit Erith more often, a high proportion of respondents indicated "nothing". Others identified the need for more shops, and specifically more independent shops.

ENVIRONMENTAL QUALITY

5.35 The 2018 audit of the town identified that Erith had an adequate environmental quality. There was clear signage to and from the Town Centre via the station, and the Riverside Shopping Centre was well-kept and tidy throughout. However, the A2016 and surrounding roads create a barrier which restricts and limits the potential for future development and growth. As a result, the centre is small and compact, and is largely dominated by the Riverside Shopping Centre, which is characterised by low quality retailers and services.

ACCESSIBILITY

5.36 Erith has a PTAL rating of 3. The train station is a 5-8 minute walk from the centre of town and provides regular connections to London Cannon Street, Crayford and Dartford. There are also seven buses that serve the town centre, and the main bus stops are located outside Cross Street (see Table 3a, Appendix B).

5.37 The town centre benefits from good road networks and connectivity; for example the A206 provides links to Greater London and the M25, and to Dartford and Bluewater. The town is also served by 817 parking spaces in its two main managed car parks; Morrisons (670 spaces) and Riverside Shopping Centre (147 spaces).

5.38 In summary, accessibility in Erith Town Centre is considered to be good. In terms of investment and development, it will be important to maintain an appropriate level of car parking to ensure the centre remains accessible to shoppers and visitors.

NEW INVESTMENT & DEVELOPMENT

5.39 The Council's ambition to see the Crossrail Elizabeth Line extended eastwards from Abbey Wood includes Erith as a potential rail stop. This would significantly boost investment for the town centre. In advance of a potential Crossrail extension, the Council is promoting the regeneration of Erith, with the aim of encouraging housing and employment growth, alongside new services, infrastructure, leisure and educational offer. A key focus of the Council's regeneration plan is the intensification of development, but through high quality design. A number of new housing schemes had been delivered in the town centre up to 2018, and there are aspirations by the Council to promote greater links between the town centre and the Riverside. In terms of retail investment, the centre would benefit from new investment, particularly the refurbishment or redevelopment of Riverside Shopping Centre. This could incorporate new leisure facilities to stimulate the centre's evening time economy.

SUMMARY

5.40 The table below summarises the key SWOTs for Erith:

STRENGTHS	OPPORTUNITIES
▪ Erith is located to the north-east of the Borough with frontage on to the River Thames. ▪ Classified as a Major District Centre in the adopted development plan and a District Centre in the London Plan. ▪ The train station is within relatively easy walking distance of the town centre – on the opposite side of the A2106 – with direct connections to London Cannon Street and Kent ▪ Had a relatively good convenience and comparison offer in 2018 - principally meets the needs of its local catchment. ▪ The Riverside Shopping Centre positively contributes to the town's shopping offer and attraction, and accommodates the majority of the town's multiple retailers. ▪ Morrisons is the main food anchor and a key generator of trips, footfall and spend.	▪ The town centre is identified as one of the Borough's major growth locations (based on the Bexley Growth Strategy). ▪ Forecast to accommodate up to 6,000 new homes in or within short distance of the town centre during the next 30 years. ▪ Potential to improve the overall quality of the independent offer, and explore potential for street/covered market. ▪ Potential to capitalise on River Thames location to support future growth, and attract more visitors to town and area. ▪ Better links to the Riverside could encourage more day-trips and longer dwell times by residents and visitors. ▪ Sites and buildings within the Council's ownership present strong opportunities for redevelopment; including potential for more flexible and affordable retail, food and beverage uses. ▪ Develop more homes in the town centre that cater for different age and income groups..

▪ Had a high representation of service outlets in 2018 – mainly smaller format, independent businesses. ▪ There were 5 vacant outlets in 2018, equivalent to a vacancy level of 6.9%, which was below the national average (11.2%). ▪ Other key assets include the old Carnegie Library, Erith Pier (the longest in London) and the riverside gardens. ▪ Diverse community, community groups and services.	▪ Improve wayfinding and legibility of public spaces – poor connectivity with station, the river and wider residential area ▪ Improve environment and public realm – including tree planting and "greening" of town centre.
WEAKNESSES	**THREATS**
▪ The town is largely constrained and divided by the A2016. This reduces permeability into the town centre, especially for pedestrians. It also places constraints on future growth/ expansion and development ▪ It had fallen in the national ranking between 2014-2018, from 1,118th to 1,276th ▪ The independent offer is largely of low quality. ▪ It had a limited café and restaurant offer in 2018; and limited evening and night-time economy. ▪ There is no street or covered market. ▪ No BID or similar town centre body. ▪ The car is the main mode of travel to the centre, which creates issues of congestion, noise and emissions. ▪ Wayfinding and legibility of public spaces – poor connectivity with station, the river and wider residential area. ▪ Lacks an identity or character – no sense of arrival or central focus.	▪ Competition from nearby towns (e.g. Bexleyheath and Welling) and Bluewater. ▪ The growth of online shopping and leisure activities. ▪ The long term impacts of the pandemic on the viability of retail, leisure and other town centre business leading to closures. ▪ A rise in vacancy levels and fall in trips and footfall. ▪ The potential impact of new PDR allowing changes from Class E (including shops) to residential (Class C3) outside of planning controls.

5.41 In summary, Erith is meeting the shopping and service needs of its resident catchment population. The low vacancy rate, and presence of key multiples contributes to the town centre's offer and overall attraction.

5.42 There is significant potential to build on and promote the centre's riverside and heritage assets to attract a wider catchment, and increase the number of day-trippers, visitors and tourists to the centre and Borough. Building on projects such as the Carnegie Building refurbishment and community events, such as the Pier Festival, will help to strengthen Erith's brand and identity – both with the local community, but also with visitors from a wider catchment.

5.43 There is also a need to introduce more leisure uses and attractions into the town centre, to help grow the evening and night-time economy. Alongside this, a regular programme of events and activities in the centre, linked to other events across the Borough, would help to attract a more diverse shopper and visitor profile. In turn this will help to create a more resilient town centre economy.

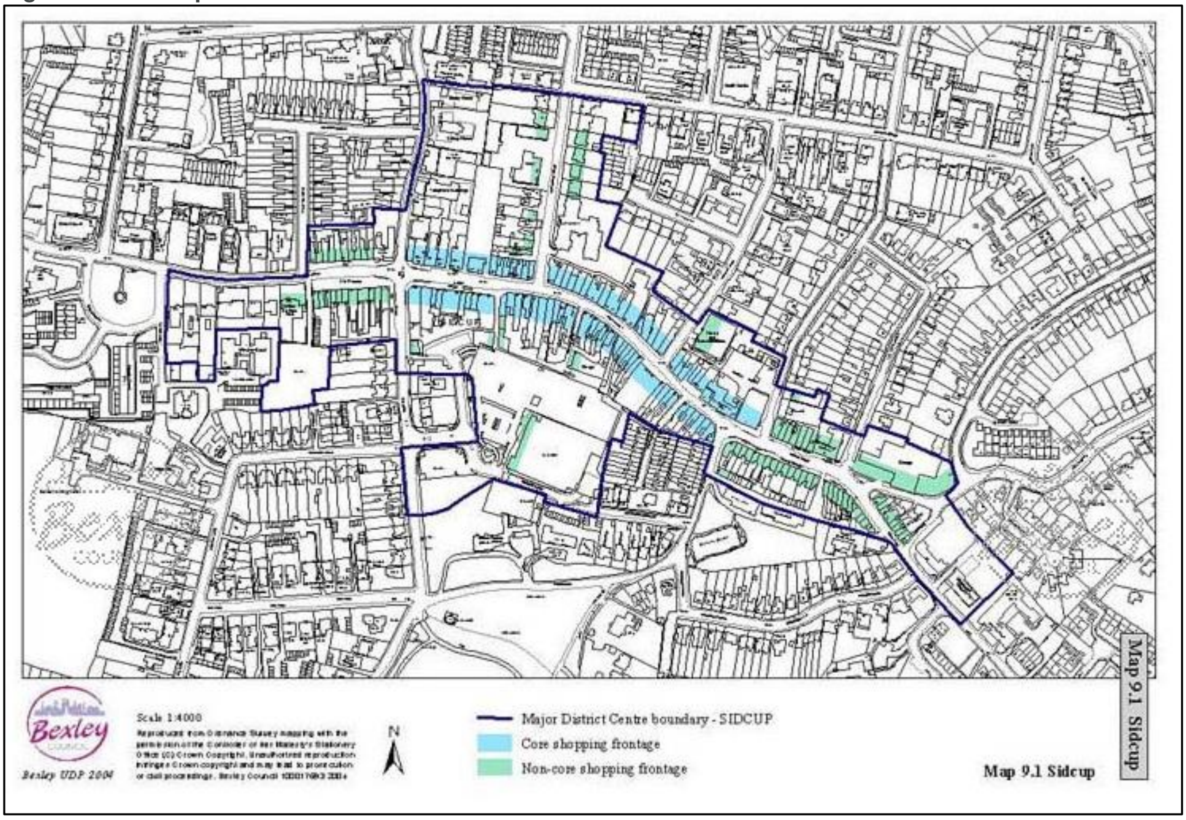
5.44 Other Improvements are needed to accessibility and wayfinding/signage, and to the town centre environment generally. There is a lack of green spaces and tree planting across the town centre to help break up the environment. Improvements to the public realm and the provision of green spaces will make a significant contribution to the town's overall vitality and viability, as well as to the health and well-being of shoppers, workers and visitors.

6 SIDCUP HEALTH CHECK

6.1 Sidcup is a Major District Centre located to the south west of the Borough, bordering the London Boroughs of Bromley and Greenwich. It is approximately 3.3 miles (5.3km) from Bexleyheath; 4.5 miles (7.2km) from Bromley; 2.9 miles (4.6km) from Eltham; and 6.3 miles (10.1km) from Dartford.

6.2 As the figure below shows, the town centre is linear in shape and is surrounded by residential uses and green space. These residential areas are largely characterised by Victorian/Edwardian properties, and 1930s suburban development. The **High Street** is the main ("core") shopping area and is where the majority of the retail and town centre uses are concentrated; including retail banks, food and convenience stores (including a Little Waitrose and Morrison's superstore), comparison shops and leisure services.

Figure 6.1: Sidcup Town Centre



Source: Map 9.1, Bexley Unitary Development Plan 2004

6.3 Although Station Road is not included in the town centre boundary, it has a good concentration of town centre uses, focussed on Sidcup Station; including a Tesco Express, Co-op food store, the police station and various restaurants. The station is approximately a 10-15 minute walk from the High Street.

CENTRE RANKING, COMPOSITION & DIVERSITY OF USES

6.4 Sidcup was ranked 819th in 2017 by Javelin VENUESCORE, and had improved its rank from 879th in 2014.

6.5 The tables below show the changes in the scale, retail mix and diversity of uses in Sidcup between 2012 and 2018 based on the Experian Goad Category Reports. It should be noted that the Experian Goad Reports do not differentiate between the retail and town centre uses on the High Street and those located on Station Road. As a result the figures may vary from the Council's own data on the separate centres.

Table 6.1: Current Retail and Service Offer – Units

Category	2012		2018		% Change: Outlets	UK Average (%) 2018
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	11	6.8%	18	7.5%	63.6%	8.9%
Comparison	41	25.3%	46	19.2%	12.2%	30.8%
Retail Service	36	22.2%	52	21.7%	44.4%	14.5%
Leisure Service	31	19.1%	56	23.3%	80.6%	23.9%
Financial & Business Service	26	16.0%	40	16.7%	53.8%	10.3%
Vacant	17	10.5%	28	11.7%	64.7%	11.2%
TOTAL	**162**	**100.0%**	**240**	**100.0%**	**48.1%**	**100.0%**

Source: Experian Goad Category Reports - July 2012 and July 2018

Table 6.2: Current Retail and Service Offer – Floorspace

Category	2012		2018		% Change: Floorspace	UK Average (%) 2018
	Space	% of Total Space	Space	% of Total Space		
Convenience	5,160	16.5%	7,190	16.5%	39.3%	15.2%
Comparison	6,510	20.9%	7,510	17.3%	15.4%	34.7%
Retail Service	4,490	14.4%	5,470	12.6%	21.8%	6.8%
Leisure Service	5,700	18.3%	12,390	28.5%	117.4%	25.1%
Financial & Business Service	4,650	14.9%	6,390	14.7%	37.4%	7.7%
Vacant	4,710	15.1%	4,540	10.4%	-3.6%	9.8%
TOTAL	**31,220**	**100.0%**	**43,490**	**100.0%**	**39.3%**	**100.0%**

Source: Experian Goad Category Reports - July 2012 and July 2018

Convenience Provision

6.6 Sidcup had 18 food and convenience units in 2018 trading from a total floorspace of 7,190 sqm. Total outlet provision (7.5%) was below the national average (8.9%), and floorspace provision (16.5%) was just above the UK average (15.2%). The main food and convenience stores included Morrisons, Little Waitrose, Iceland and Tesco Express. The convenience provision is further supplemented by two bakers, a CTN store, seven convenience stores, and a greengrocer. There was increase in units and floorspace between 2012 and 2018.

Comparison Provision

6.7 There were 46 comparison goods retailers in 2018, trading from a total floorspace of 7,510 sqm. The outlet provision (19.2%) was significantly below the national average (30.8%), and floorspace provision (17.3%) was below the UK average (34.7%). Notwithstanding this, there had been an increased in comparison outlets and floorspace since 2012. The main categories represented included charity shops (7 units), chemists (4 units), computer equipment stores (3 units), interior decoration stores (3 units), and independent fashion stores (4 units).

Service Provision

6.8 There was a strong service provision in Sidcup in 2018. There were 148 service outlets, and provision (61.7%) was above the national average (48.7%). Floorspace provision (55.8%) was also higher than the national average (39.6%). In terms of the distribution of uses there were:

- 52 **retail services**. This represented 21.7% of total outlets, which was above the national average (14.5%). This category was mostly made up of health and beauty outlets (31 units); dry cleaners (4 units); opticians (4 units); a post office and other retail services. There had been an increase in units and floorspace since 2012.

- 40 **financial services**. This represented 16.7% of total units and was above the national average (10.3%). This category comprised 8 retail banks, 10 property services, 5 legal services, 3 employment and careers outlets, a building society, 5 building supplies and services, a printing and copying service and three other business service. There had been an increase in units and floorspace since 2012.
- 56 **leisure services.** This represented 23.3% of total outlets and was marginally below the national average (24.0%). Leisure provision included 15 restaurants, 13 cafés, 14 fast food takeaways, a bar, 4 public houses, 3 sports and leisure facilities, and 2 hotels and guest houses. There was also an increase in units and floorspace between 2012 and 2018.

VACANCY LEVELS

6.9 Sidcup had 28 vacant outlets in 2018, an increase from 17 in 2012. Its vacancy level of 11.7% was slightly above the national average of 11.2%. Vacant floorspace (4,540 sqm) represented 10.4% of total floorspace, and was also slightly above the national average (9.8%). Although vacancy levels were only just above the national averages in 2018, there had been a significant increase in vacancies in 2012. For example, Blockbuster had been vacant since 2013; although there were plans in 2018 for its redevelopment. Against the background of the dynamic and challenging retail market, it was recommended that the Council monitored occupancy and vacancy levels on a frequent basis.

MULTIPLES AND INDEPENDENTS

6.10 The mix of multiples and independents was relatively good in 2018. According to Experian Goad there were some 61 multiple retailers in Sidcup. These included key multiple brands such as Morrisons, Caffe Nero, Prezzo and Little Waitrose. Multiples accounted for 37.6% of the total units. The independent offer is considered to be strong.

Table 6.3: Multiple Retailers

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	13	21.3%	42.7%
Convenience	7	11.5%	11.2%
Retail Service	7	11.5%	9.2%
Leisure Service	19	31.1%	21.9%
Financial & Business Service	15	24.6%	15.0%
TOTAL	**61**	**100.0%**	**100.0%**

MARKETS AND EVENTS

6.11 There were no regular/permanent markets operating in Sidcup in 2018. However, the Sidcup Business Improvement District (BID) was running seasonal events approximately four times a year.

RETAIL DEMAND & REQUIREMENTS

6.12 There were 11 operators with published requirements for Sidcup in 2018; equivalent to a total floorspace of between 4,041 sqm and 11,148 sqm gross (see Table 4, Appendix A). Based on published requirements and compared to other centres in the Borough, demand appeared to be relatively strong for Sidcup in 2018.

Key brands seeking space in the town included Lidl[22], Sofology, Starbucks, KFC and Snap Fitness. However, a number of the listed operators with requirements were also seeking space in out of centre locations. Notwithstanding published requirements were relatively good for Sidcup in 2018 compared with other centres in the Borough, the number of retail and leisure operators seeking space in the centre was still limited. This reflected the fact that the main multiple operators were focusing their new store openings in larger and/or better performing centres, or increasing market share through online sales.

PRIME ZONE A RENTS & YIELDS

6.13 Neither Prime Zone A Rents nor yields were available for Sidcup in 2018.

CUSTOMER VIEWS & PERCEPTIONS - HOUSEHOLD SURVEY

6.14 To help understand the overall attraction and performance of Sidcup from a retail and leisure perspective, the 2018 household telephone interview survey (HTIS) asked respondents how often they visited the centre, what they "*liked*" about Sidcup, and what "improvements" would potentially make them visit the town more than they currently do. The results are summarised in Appendix C (Tables C10-C12).

6.15 In terms of frequency of visits some 41.4% of respondents across the Catchment Area (Zones 1-8) visited Sidcup at least once a week. This increased to 65.1% within the Borough area (Zones 1-6) and 65% within Sidcup's "core" survey zone (i.e. Zone 6). The survey results also show that 23.6% of respondents in the Catchment Area, 9.4% in the Borough and 10.7% in Sidcup's "core" zone stated that they "never" visit the centre for shopping or other purposes.

6.16 The majority of respondents 'like' Sidcup because it is close to where they live. Other positive aspects include the attractive environment, good range of non-food shops, and good pubs, cafés and restaurants. In response to what improvements would encourage respondents to visit Sidcup more often than they currently do, a high proportion of respondents indicated "nothing". Others identified the need for more high street retailers generally, and specifically for more independent shops.

ENVIRONMENTAL QUALITY

6.17 Overall Sidcup had a good town centre environmental quality in 2018, generally characterised by wide pavements, street lighting and planting. This creates a welcoming and pleasant environment. Furthermore, the active frontages were well-kept in 2018 and the centre was generally clean and tidy throughout.

6.18 The attractive buildings along the High Street create symmetry and regularity which overall contributes to the quality and creates character and identity. There were also plans by the Sidcup BID in 2018 to install a drinking water fountain.

6.19 Accessibility by foot from the Station to the High Street is poor and can take up to 15 minutes. Although the station is accessible by car and public transport, Station Road is busy and heavy trafficked, particularly during peak periods. This contributes negatively to air and noise pollution.

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[22] Although Lidl had published requirements for floorspace in Sidcup in 2018, it was also seeking planning permission at the time to demolish its existing store in nearby Foots Cray and replace it with a larger store. Planning permission is currently pending for the scheme. If granted this is likely to satisfy any requirement for floorspace in Sidcup.

ACCESSIBILITY

6.20 Accessibility by different modes to Sidcup Town Centre is considered to be reasonable. It has a PTAL rating of 4 and the train station provides regular connections to London's Cannon Street and Charing Cross stations, as well as Woolwich, Dartford and Gravesend. However the station is a circa 15 minute walk from the main High Street and Morrisons.

6.21 There are ten buses that connect the town with other centres and residential areas (see Table 4a, Appendix B). The main bus stops are located outside the station and the Police Station. Sidcup also has good connectivity to the road network. For example, the A20 provides links to Greater London and the M25. The centre is also served by six main car parks, including the Morrisons (290 spaces) and station (267 spaces) car parks (see Table 4b, Appendix B).

NEW INVESTMENT & DEVELOPMENT

6.22 Sidcup had experienced good retail and leisure investment up to 2018. The Little Waitrose opened on the High Street in 2017/18 and was the first Waitrose outlet in the Borough. The development also included an 84-bedroom Travelodge hotel. Further investment was planned at the time of preparing the 2018 study. For example, a library and cinema were proposed as part of the redevelopment of the vacant former Blockbuster unit on High Street.

SUMMARY

6.23 The table below summarises Sidcup's main SWOTs:

STRENGTHS	OPPORTUNITIES
▪ Classified as a Major District Centre in the adopted plan, and a District Centre in the London Plan. ▪ Main shopping destination for residents living in the south of Bexley Borough, with a catchment that extends into other neighbouring authority areas. ▪ Morrison's and Little Waitrose stores are important anchors that help generate linked trips and footfall across the High Street throughout the week. ▪ Sidcup had improved its national VENUESCORE ranking from 879th in 2014 to 819th due to new investment. ▪ Strong provision of retail, leisure and financial services. ▪ Sidcup Business Improvement District (BID) - runs seasonal events (approximately 4x a year). ▪ The overall quality of the shopping environment is good – comprising attractive buildings and "clean and tidy" streets. ▪ Benefited from new investment at the time of the 2018 healthcheck – including Little Waitrose and Travelodge. ▪ Vacancy levels (for outlets and floorspace) are slightly above the national averages ▪ The "creative heart" of the Borough, home to 2 international performing arts colleges - Rose Bruford and Bird College. ▪ Good provision of heritage buildings and landscapes and parks (e.g. Sidcup Manor House, Sidcup Green) ▪ Good community infrastructure – library, churches, clubs and community venues	▪ Improve accessibility and signage from the train station to the High Street ▪ Redevelopment of former Blockbuster unit to provide a new 3-screen cinema to be operated by the Really Local Group and a new library complex. ▪ Potential for increased marketing and promotional events to attract more people and visitors to centre – need to provide event space. ▪ Introduce more residential and flexible uses in the town centre. ▪ Promote alternative modes of travel to car – improve cycle network and pedestrian routes.

▪ Although not part of the main High Street, Sidcup Station parade is considered functionally as part of Sidcup and is included within the boundary of the Sidcup Partners BID zone. This area is characterised by a good mix of shops, cafés, coffee shops, bars and restaurants serving commuters and students from the nearby colleges. ▪ The railway station provides train services to Charing Cross and London Bridge. The town is also served a good bus network. ▪ Well connected by road - with the nearby A20 providing links to Greater London and the M25	
WEAKNESSES	**THREATS**
▪ Fragmented town centre – split between High Street and Station Parade ▪ The main high street and uses (including Morrisons) are a 15 minute walk from Sidcup Station. ▪ The number of vacant units had increased from 17 in 2012 to 28 in 2018. ▪ Limited comparison goods offer. ▪ Heavy traffic along the High Street and Station Road, generating congestion, noise and emissions. ▪ No street or covered markets.	▪ Competition from towns, shopping and leisure locations both within and outside the Borough. ▪ The growth of online shopping and leisure activities. ▪ The long term impacts of the pandemic on the viability of retail, leisure and other town centre business leading to closures – specifically the potential loss of major multiples on High Street ▪ A rise in vacancy levels and fall in trips and footfall. ▪ The potential impact of new PDR allowing changes from Class E (including shops) to residential (Class C3) outside of planning controls.

6.24 In summary, Sidcup is a relatively attractive and healthy centre. It is meeting the shopping, leisure and service needs of its local resident catchment to the south of the Borough.

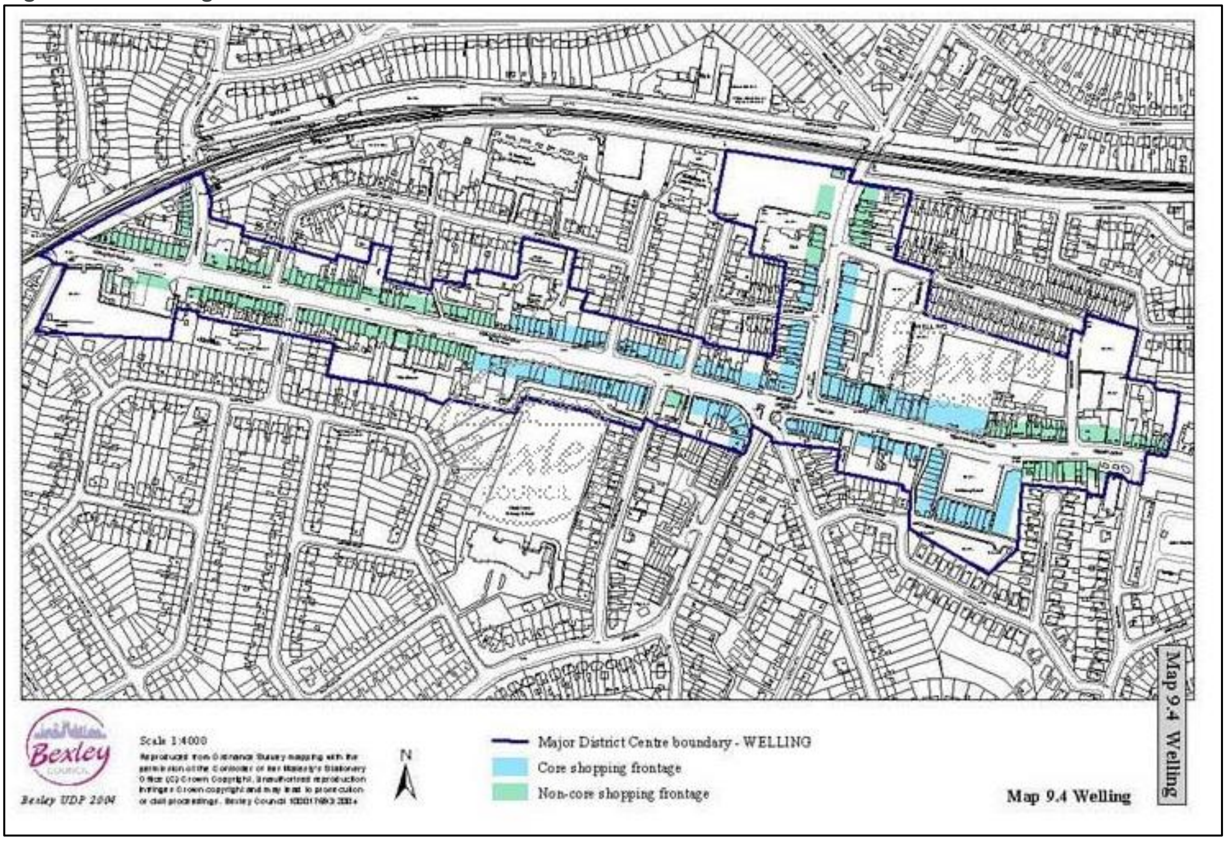
6.25 It has benefitted from new investment and development over recent years – including Little Waitrose and Travelodge on the corner of the High Street and St John's Road. Other committed investment includes the new 3-screen cinema to be operated by the Really Local Group and a new library complex, scheduled to open in 2022.

6.26 Other opportunities to help maintain and enhance the overall vitality and viability of the town centre include improvements to the environment, the diversification of uses to respond to the changes in the retail sector, and the potential for new residential mixed-use development. Improvements to the linkages, signage and wayfinding between the main High Street and Sidcup Station were also highlighted.

7 WELLING HEALTH CHECK

7.1 Welling is classified as a Major District Centre in the Local Plan and as a District Centre in the London Plan. It is located to the west of the Borough and is approximately 3.4 miles (5.4km) from Woolwich; 4.8 miles (7.7km) from London City Airport; and 4.9 miles (7.8km) from Dartford. As the figure below shows the centre is linear in shape and is surrounded by residential uses and green space.

Figure 7.1: Welling Town Centre



Source: Map 9.4, Bexley Unitary Development Plan 2004

7.2 The centre can be divided into the following two distinct areas:

- **The Core Shopping Frontage:** is focussed on the junction of the High Street with Upper Wickham Lane / Nags Head Lane. Key multiples here in 2018 included Superdrug, Barclays Bank, Morrisons, Tesco and Lidl.
- **Non-core Shopping Frontage:** the rest of the centre is characterised by small, niche, low quality independents and services, including restaurants, fast food take-aways and other retail, leisure and financial services.

CENTRE RANKING, COMPOSITION & DIVERSITY OF USES

7.3 Welling improved its national VENUESCORE ranking from 586th in 2014 to 558th in 2018. The tables below show the changes in Welling's floorspace and diversity of uses between 2012 and 2018.

Table 7.1: Current Retail and Service Offer – Units

Category	2012		2018		% Change: Outlets	UK Average (%) 2018
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	25	8.7%	24	8.8%	-4.0%	8.9%
Comparison	83	29.0%	71	25.9%	-14.5%	30.8%
Retail Service	52	18.2%	57	20.8%	9.6%	14.5%
Leisure Service	54	18.9%	69	25.2%	27.8%	23.9%
Financial & Business Service	44	15.4%	37	13.5%	-15.9%	10.3%
Vacant	28	9.8%	16	5.8%	-42.9%	11.2%
TOTAL	**286**	**100.0%**	**274**	**100.0%**	**-4.2%**	**100.0%**

Source: Experian Goad Category Reports - October 2012 and January 2018

Table 7.2: Current Retail and Service Offer – Floorspace

Category	2012		2018		% Change: Floorspace	UK Average (%) 2018
	Space	% of Total Space	Space	% of Total Space		
Convenience	16,834	35.9%	15,338	34.3%	-8.9%	15.2%
Comparison	11,158	23.8%	10,043	22.5%	-10.0%	34.7%
Retail Service	3,763	8.0%	4,673	10.5%	24.2%	6.8%
Leisure Service	7,609	16.2%	9,049	20.3%	18.9%	25.1%
Financial & Business Service	4,320	9.2%	3,893	8.7%	-9.9%	7.7%
Vacant	3,205	6.8%	1,663	3.7%	-48.1%	9.8%
TOTAL	**46,889**	**100.0%**	**44,658**	**100.0%**	**-4.8%**	**100.0%**

Source: Experian Goad Category Reports - October 2012 and January 2018

Convenience Provision

7.4 There were 24 convenience units in Welling in 2018, trading from a total floorspace of 15,338 sqm. The provision of outlets (8.8%) was comparable with the national average (8.9%), and floorspace provision (34.3%) was significantly above the national average (15.2%). This reflects the presence of larger format foodstores in the centre, including Morrisons, Tesco and Lidl. Welling's food and convenience provision also included 4 bakers, a butchers, 2 CTN stores, 7 convenience stores, a fishmonger, a frozen food store, 3 grocers, and a health food store.

Comparison Provision

7.5 There were 71 comparison goods retailers in 2017, trading from a total floorspace of 10,043 sqm. The provision of outlets (25.9%) and floorspace (22.5%) was below the national averages. There had also been a fall in comparison units and floorspace since 2012. Notwithstanding this, Welling had a relatively good representation of retailers across most of the comparison goods categories, including: electrical goods (9 units), charity shops (7 units), carpet and flooring stores (4 units), chemist and drugstores (4 units), and furniture stores. However there was an under provision of fashion, clothing and footwear shops and floorspace benchmarked against national averages.

Service Provision

7.6 There were 163 service outlets in Welling in 2018, trading from a total floorspace of 17,615 sqm. Total outlet provision (59.5%) was above the national average (48.7%), and floorspace provision (39.5%) was broadly equivalent to the national average (39.6%). In terms of the distribution of uses in 2018, there were:

- 57 **retail services**. This represented 20.8% of total outlets and was above the national average (14.5%). This mainly comprised health and beauty outlets (43 units), dry cleaners (3 units), opticians (4 units), a post office, and a travel agent. There had been an increase in units and floorspace between 2012 and 2018.
- 37 **financial services**. This represented 13.5% of total units, which was above the national average (10.3%). This main services included 3 retail banks, 11 property/legal businesses, 9 building supplies and services, and 2 printing and copying services. There had been a reduction in both units and floorspace since 2012.
- 69 **leisure services**. This represented 25.2% of total provision, which was above the national average 24.0%. The leisure uses mainly comprise of 13 restaurants, 14 cafés, 22 fast food takeaways, 6 public houses, 8 sports and leisure facilities, and 4 casinos and betting offices. There had been an increase in units and floorspace between 2012 and 2018.

VACANCY LEVELS

7.7 There were 16 vacant outlets in 2018. This was equivalent to a vacancy level of 5.8%, which was significantly below the national average (11.2%). Vacant floorspace of 1,663 sqm (3.7% vacancy level) was also below the UK average (9.8%). Vacancy levels have fallen significantly since 2011.

MULTIPLES AND INDEPENDENTS

7.8 There were some 55 multiple retailers in Welling in 2018. This included key brands such as Tesco, Morrison's, Superdrug and McDonald's. Notwithstanding this, multiples accounted for only 19.2% of total units in 2017, with the majority of Welling's retail and service offer characterised by smaller, niche independents.

Table 7.3: Multiple Retailers

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	15	27.3%	42.7%
Convenience	6	10.9%	11.2%
Retail Service	6	10.9%	9.2%
Leisure Service	19	34.5%	21.9%
Financial & Business Service	9	16.4%	15.0%
TOTAL	**55**	**100.0%**	**100.0%**

Source: Experian Goad (2018)

MARKETS AND EVENTS

7.9 There were no regular/permanent markets operating in Welling in 2018.

RETAIL DEMAND & REQUIREMENTS

7.10 There were six operators with published requirements for Welling in 2018; equivalent to a total floorspace of between 1,115 sqm and 2,787 sqm gross (see Table 5, Appendix A). However the demand from some of the operators (e.g.Toolstation, Pets @ Home and Easistore) would have been for larger format units in edge and/or out of centre locations, rather than in Welling. The other demand was from KFC (already represented in Welling), Lounges (the bar/restaurant chain) and Herbert Restaurants Lounges. While there may be unpublished requirements for Welling Town Centre, it is more likely that new retail and leisure operators are seeking representation in larger and better performing centres, or increasing market share through online sales.

PRIME ZONE A RENTS & YIELDS

7.11 Neither Prime Zone A Rents nor yields were available for Welling in 2018.

CUSTOMER VIEWS & PERCEPTIONS - HOUSEHOLD SURVEY

7.12 To help understand the overall attraction and performance of Welling from a retail and leisure perspective, the 2018 household telephone interview survey (HTIS) asked respondents how often they visited the centre, what they "*liked"* about Welling, and what "improvements" would potentially make them visit the town more than they currently do. The responses are summarised in Appendix C, Tables C13-C15.

7.13 In terms of frequency of visits 64.4% of respondents across the Catchment Area (Zones 1-8) visited Welling at least once a week. This increased to 66.7% within the Borough area (Zones 1-6) and 72.7% within the Welling "core" survey zone (i.e. Zone 3). The survey results also show that 12.6% of respondents in the Catchment, 9.6% in the Borough and 7.8% in Welling's "core" zone stated that they "never" visit the centre for shopping or other purposes.

7.14 The majority of respondents "like" the centre because it is close to where they live. Other positive aspects include the attractive environment, good range of non-food shops, and the mix of places to eat and drink.

7.15 In response to what improvements would encourage respondents to visit Welling more than they currently do, a high proportion of respondents indicated "nothing". Others identified the need for more high street retailers generally, and specifically for more independent shops and better cafés and restaurants.

ENVIRONMENTAL QUALITY

7.16 At the time of the 2018 audit Welling was identified as having an adequate environmental quality. It was characterised by more run-down buildings compared with the Borough's other centres (such as Sidcup and Bexleyheath), and it lacked planting to help break up the environment. Despite this, the wide pavements promoted safe and easy movement across the centre. There was also a good provision of street lighting and active frontages along Bellegrove Road which creates a sense of safety.

ACCESSIBILITY

7.17 Overall accessibility in Welling is good. It has a PTAL rating of 4. The nearest train station is located on Station Approach, approximately a five-minute walk from the town centre. This station provides regular connections to London's Cannon Street, Charing Cross and Victoria stations, as well as Slade Green, Dartford and Gravesend.

7.18 There are six buses that serve the centre, and the main bus stops are located at Welling High Street and Welling Corner (see Table 5a, Appendix B). Welling has good connections to the road network; for example the A207 provides links to Greater London and the M25. It also has a relatively good provision of car parks for a centre of its size. The three main car parks have over 350 spaces, with the majority provided at Westwood Lane Car Park (155) and Welling Station (112).

SUMMARY

7.19 The table below summarises Welling's key SWOTs:

STRENGTHS	OPPORTUNITIES
▪ Classified as a Major District Centre in the adopted development plan, and a District Centre in the London Plan. ▪ Located in the west of the Borough; with access to a well-connected railway station near the western end of the town and served by numerous bus routes. ▪ An improvement in its national rank from 586th in 2014, to 558th. ▪ A strong food and convenience offer – anchored by new Tesco, and Morrisons to the east of the town on the High Street. Lidl store also located off the High Street on upper Wickham Lane. These stores meet the main 'bulk' food shopping needs of its local catchment population. ▪ The centre had a good number and mix of smaller, independent shops and businesses. ▪ Good provision of retail, financial and leisure services in 2018 – including choices of places to eat and drink. ▪ Retail services (including hairdressers, beauty salons, etc.) experienced the most growth in the last 5 years. ▪ 16 vacant outlets in 2018 - vacancy level of 5.8% was significantly below the national average (11.2%). There had also been a fall in vacant units since 2013. ▪ Core shopping area is well used and experiences high volumes of pedestrian footfall which contributes to the centre's vitality and viability. ▪ Library (including workspace) is popular and generates footfall across the centre. ▪ Good connectivity with residential areas – resulting in higher proportion of visitor to centre travelling by foot and bike.	▪ Potential for greater flexibility and diversity in centre offer. ▪ Potential for a street market to help diversify the offer and attractions. ▪ Consolidate the town centre to allow greater focus on key shopping areas. ▪ Potential for revitalisation of some frontages / facades, and run-down buildings, to improve overall environment. ▪ Introduce more residential and flexible uses in the town centre, either through the occupation/repurposing of vacant space, or through mixed-use redevelopment. ▪ Make more of green spaces nearby - Danson Park, East Wickham Open Space and Oxleas Woods
WEAKNESSES	**THREATS**
▪ Heavy traffic along the main street in the centre, resulting in congestion, noise and emissions, with impacts on pedestrian movement, safety and perception. ▪ Long linear centre – too many shops? ▪ No permanent street or covered markets ▪ Some poor, run-down buildings that lend themselves to redevelopment. ▪ A lack of planting and green spaces to break up the environment. ▪ No central public space – to accommodate events and act as a gathering/meeting point. ▪ Lack of leisure facilities and cultural offer.	▪ Competition from towns, shopping and leisure locations both within and outside the Borough (including Plumstead). ▪ The growth of online shopping and leisure activities. ▪ The long term impacts of the pandemic on the viability of retail, leisure and other town centre business leading to closures. ▪ A rise in vacancy levels and fall in trips and footfall. ▪ The potential impact of new PDR allowing changes from Class E (including shops) to residential (Class C3) outside of planning controls.

7.20 In summary, the key performance indicators show that Welling was a vital and viable centre in 2018. It was fulfilling its role and function in the Borough's network and hierarchy of centres, meeting the retail, service and leisure needs of its local resident catchment population.

7.21 Potential improvements have been identified, including the need for investment in the quality of the environment, strengthening its evening economy and diversifying its overall offer. Opportunities to introduce green spaces, tree planting and improvements to the public realm should be explored to help improve the overall attraction of the centre, tackle carbon emissions and improve general health and well-being. Together these improvements, and others, will help to improve the attraction of the town and build greater resilience in response to the downturn in the retail sector and falling market demand.

APPENDIX A: PUBLISHED REQUIREMENTS 2018

TABLE 1: BEXLEYHEATH

Operator	Category	Use Class	Minimum Floorspace (gross sqm)	Maximum Floorspace (gross sqm)
British Heart Foundation	Comparison	A1	465	743
Beaumont Beds	Comparison	A1	139	372
Cigara	Comparison	A1	23	74
Five Pound World	Comparison	A1	186	465
Hotshots	Comparison	A1	19	186
Revital	Comparison	A1	74	70
Hawkins Bazaar	Comparison	A1	149	70
Poundworld	Comparison	A1	465	372
Clintons	Comparison	A1	186	102
Snap Fitness	Leisure Service	D2	372	2,787
Travelodge	Leisure Service	C1	929	3,716
Vets4Pets	Medical Service	D1	139	279
Dentix	Medical Service	D1	186	929
Supercuts	Retail Service	A1	56	1,858
Easistore	Retail Service	B8	1,115	279
Big Yellow Self Storage	Retail Service	B8	1,394	3,716
TOTAL	**16**		**5,895**	**16,016**

Source: The Requirements List - 2018

Notes: Use Class Order reforms implemented from September 1 2020. Class A1-A3, B1 and D2 (gyms and areas for indoor/outdoor sport) are classified as new Use Class E. Class A4 (drinking establishments), Class A5 (hot-food and takeaway) and Class D2 (comprising venues for live music, cinemas, concert, bingo and dance halls) are all classified as '*Sui Generis*'.

TABLE 2: CRAYFORD

Operator	Category	Use Class	Minimum Floorspace (sqm)	Maximum Floorspace (sqm)
Age UK	Comparison	A1	79	650
British Heart Foundation	Comparison	A1	465	743
Poundworld	Comparison	A1	465	1,858
Lidl	Convenience	A1	929	2,787
Snap Fitness	Leisure Service	D2	372	929
Big Yellow Self Storage	Retail Service	B8	1,394	3,716
TOTAL	**6**		**3,702**	**10,684**

TABLE 3: ERITH

Operator	Category	Use Class	Minimum Floorspace (sqm)	Maximum Floorspace (sqm)
Topps Tiles	Comparison	A1, B8	232	2,787
Vets4Pets	Comparison	D1	139	743
Hotshots	Comparison	A1	19	186
Snap Fitness	Leisure Service	D2	372	1,858
TOTAL	**4**		**762**	**5,574**

TABLE 4: SIDCUP

Operator	Category	Use Class	Minimum Floorspace (sqm)	Maximum Floorspace (sqm)
Sofology	Comparison	A1	929	1,394
The Works	Comparison	A1	163	232
Lidl	Convenience	A1	929	2,787
Starbucks	Leisure Service	A1	139	186
KFC	Leisure Service	A3	167	325
Wadworth	Leisure Service	A4	186	557
Snap Fitness	Leisure Service	D2	372	929
Marstons	Leisure Service	A4	465	836
National Tyres & Autocare	Retail Service	B2	232	465
Lok'nStore	Retail Service	B8	1,394	4,645
Big Yellow Self Storage	Retail Service	B8	1,394	3,716
TOTAL	**11**		**6,368**	**16,072**

TABLE 5: WELLING

Operator	Category	Use Class	Minimum Floorspace (sqm)	Maximum Floorspace (sqm)
Toolstation	Comparison	B8	232	465
Pets @ Home	Comparison	A1	325	557
Loungers	Leisure Service	A3	186	372
Herbert Restaurants	Leisure Service	A3	242	279
Easistore	Retail Service	B8	1,115	2,787
TOTAL	**5**		**2,100**	**4,459**

APPENDIX B: IN-CENTRE SURVEY – SUMMARY TABLES

BEXLEYHEATH STRATEGIC CENTRE

Table B1: Primary and Secondary Reasons to Bexleyheath

Reason to Visit Bexleyheath	Primary Reason	Secondary Reason
Non-food shopping (e.g. electrical, household goods, clothes & shoes)	27.3%	13.3%
Food shopping (not take-aw ay, café, restaurant)	21.3%	9.3%
Window Shopping	13.3%	27.3%
Socialising	8.0%	14.0%
Work / business	6.0%	60.0%
Brow sing	6.0%	18.7%
Personal services (e.g. hairdressers, nail bar, beauty salon)	4.7%	2.7%
Eating or drinking out	2.7%	3.3%
Financial services (e.g. banks, building societies, accountants)	2.0%	2.7%
Other services (e.g. travel agents, estate agents)	2.0%	0.0%

Table B2: Reasons to visit Bexleyheath over other Centres

Reason to visit Bexleyheath over other centres	
Close to home / live here	28.0%
Good range of shops / services	14.7%
Meet friends / relatives	8.7%
Attractive place / nice environment	8.0%
To visit particular services	7.3%
Close to w ork	6.7%
Close to friends / relatives	6.0%
Good public transport	2.7%
Visit financial facility (e.g. bank / post office)	2.0%
Good range of food and/or drink outlets	2.0%

CRAYFORD MAJOR DISTRICT CENTRE

Table B3: Primary and Secondary Reasons to Crayford

Reason to Visit Crayford	Primary Reason	Secondary Reason
Food shopping (not take-aw ay, café, restaurant)	41.3%	15.2%
Non-food shopping (e.g. electrical, household goods, clothes & shoes)	13.0%	8.7%
Other services (e.g. travel agents, estate agents)	8.7%	2.2%
Eating or drinking out	8.7%	4.3%
Socialising	8.7%	8.7%
Personal services (e.g. hairdressers, nail bar, beauty salon)	4.3%	6.5%
Work / business	2.2%	2.2%
Education	2.2%	2.2%
Library	2.2%	2.2%
Health & fitness / gym	2.2%	2.2%

Table B4: Reasons to visit Tower Retail Park

Reason to Visit Tower Retail Park	Primary Reason	Secondary Reason
Non-food shopping (e.g. electrical, household goods, clothes & shoes)	52.0%	14.0%
Browsing	18.0%	32.0%
Window Shopping	8.0%	24.0%
Food shopping (not take-away, café, restaurant)	4.0%	2.0%
Eating or drinking out	2.0%	6.0%
Socialising	2.0%	16.0%
Work / business	4.0%	N/A
No particular purpose	4.0%	N/A

ERITH MAJOR DISTRICT CENTRE

Table B5: Primary and Secondary Reasons to Bexleyheath

Reason to Visit Erith	Primary Reason	Secondary Reason
Food shopping (not take-away, café, restaurant)	50.7%	17.3%
Non-food shopping (e.g. electrical, household goods, clothes & shoes)	28.0%	29.3%
Personal services (e.g. hairdressers, nail bar, beauty salon)	5.3%	4.0%
Eating or drinking out	2.7%	2.6%
Work / business	2.7%	0.0%
Browsing	2.7%	18.6%
Medical services (e.g. doctors, clinic)	2.7%	2.6%
Window Shopping	1.3%	5.3%
Other services (e.g. travel agents, estate agents)	1.3%	0.0%

Table B6: Reasons to Erith over other centres

Reaons to visit Erith over other Centres	
Close to home / live here	65.3%
To visit particular services	8.0%
Close to friends / relatives	6.7%
Good range of shops / services	5.3%
(Don't know)	5.3%
Close to work	2.7%
Meet friends / relative	2.7%
Visit financial facility (e.g. bank / post office)	1.3%
Good range of food and/or drink outlets	1.3%
To visit a particular shop - Harrisons Pharmacy	1.3%

APPENDIX C: HOUSEHOLD SURVEY – SUMMARY TABLES

BEXLEYHEATH STRATEGIC CENTRE

Table C1: Frequency of Visits to Bexleyheath

Frequency	Responses from Bexleyheath (Zone 4)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Daily	6.1%	2.0%	1.6%
4-6 days a week	2.7%	1.7%	1.3%
2-3 days a week	19.9%	12.2%	9.7%
One day a week	16.9%	20.4%	16.7%
Every two weeks	17.6%	18.2%	15.2%
Monthly	16.1%	15.8%	14.3%
Once every two months	1.6%	5.8%	5.9%
Three-four times a year	4.2%	4.8%	5.8%
Once a year	0.0%	2.0%	2.0%
Less often	0.5%	1.1%	1.7%
Never	13.9%	15.3%	25.2%
(Don't know)	0.5%	0.1%	0.1%
(Varies)	0.0%	0.7%	0.6%

Source: HTIS 2018

Table C2: Reasons for Visiting Bexleyheath

Aspect	Responses from Bexleyheath (Zone 4)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Close to home	51.7%	34.1%	32.5%
(Nothing / very little)	17.5%	16.1%	18.0%
Good range of non-food shops	9.2%	12.9%	14.0%
Good range of 'High Street' retailers / multiples	2.5%	9.5%	9.2%
Good range of independent shops	3.7%	7.3%	7.2%
Easy to park	3.7%	6.5%	6.4%
Compact	9.3%	5.2%	5.5%
Attractive environment / nice place	2.5%	4.4%	4.3%
Good pubs, cafés or restaurants	4.4%	4.0%	3.8%

Source: HTIS 2018

Table C3: Key Improvements that would potentially make respondents visit more often

Aspect	Responses from Bexleyheath (Zone 4)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
(Nothing)	50.3%	66.3%	68.6%
More high street retailers	14.4%	8.1%	7.2%
More / better comparison (non-food) retailers	3.2%	5.4%	4.8%
More independent retailers	10.3%	4.8%	4.4%
More / better retail in general	3.6%	3.7%	3.5%
(Don't know)	1.3%	2.9%	2.6%
More / better restaurants / cafés	10.9%	2.8%	2.5%
More / better niche or specialist retailers	1.9%	2.6%	2.3%
Other	1.9%	1.8%	1.8%
More / better leisure offer	4.5%	1.6%	1.5%

Source: HTIS 2018

CRAYFORD STRATEGIC CENTRE

Table C4: Frequency of Visits to Crayford Town Centre

Frequency	Responses from Crayford (Zone 5)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Daily	16.9%	9.4%	5.8%
4-6 days a week	15.0%	10.1%	7.5%
2-3 days a week	34.0%	28.8%	26.0%
One day a week	19.0%	21.8%	28.1%
Every two weeks	13.2%	10.8%	10.1%
Monthly	0.0%	1.1%	6.3%
Once every two months	0.0%	0.0%	0.9%
Three-four times a year	0.0%	7.4%	4.7%
Once a year	0.0%	0.0%	1.5%
Less often	0.0%	0.0%	0.0%
Never	2.0%	10.7%	9.0%
(Don't know)	0.0%	0.0%	0.0%
(Varies)	0.0%	0.0%	0.0%

Source: HTIS 2018

Table C5: Reasons for Visiting Crayford Town Centre

Aspect	Responses from Crayford (Zone 5)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Close to home	66.6%	43.9%	43.0%
(Nothing / very little)	10.5%	21.9%	17.4%
Good range of non-food shops	3.9%	6.7%	11.5%
Easy to park	2.0%	5.0%	8.4%
Good range of 'High Street' retailers / multiples	3.9%	4.6%	6.9%
Attractive environment / nice place	5.8%	4.4%	6.2%
Good food stores	2.2%	3.6%	6.1%
Good range of independent shops	3.9%	5.9%	5.3%
Free parking	0.0%	4.0%	3.3%

Source: HTIS 2018

Table C6: Key Improvements for Crayford Town Centre

Aspect	Responses from Crayford (Zone 5)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
(Nothing)	69.0%	66.4%	77.9%
Other	6.4%	7.7%	5.2%
More / better comparison (non-food) retailers	4.1%	4.1%	4.5%
More independent retailers	6.6%	3.7%	3.8%
More high street retailers	6.3%	3.5%	3.7%
More / better retail in general	1.9%	2.3%	3.3%
(Don't know)	8.0%	4.5%	2.7%
More / better traditional retailers	4.4%	3.6%	2.2%
More / better food / convenience retailers	0.0%	1.9%	1.9%
More / better professional services	3.9%	2.2%	1.3%

Source: HTIS 2018

ERITH MAJOR DISTRICT CENTRE

Table C7: Frequency of Visits to Erith Town Centre

Frequency	Responses from Erith (Zone 2)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Daily	2.9%	2.5%	2.5%
4-6 days a week	1.1%	0.7%	0.7%
2-3 days a week	17.3%	15.5%	15.5%
One day a week	23.1%	22.1%	22.1%
Every two weeks	6.2%	7.5%	7.5%
Monthly	15.6%	12.8%	12.8%
Once every two months	12.0%	13.9%	13.9%
Three-four times a year	0.9%	4.3%	4.3%
Once a year	0.0%	1.9%	1.9%
Less often	0.0%	0.0%	0.0%
Never	19.0%	17.6%	17.6%
(Don't know)	0.0%	0.0%	0.0%
(Varies)	1.9%	1.2%	1.2%

Source: HTIS 2018

Table C8: Reasons for Visiting Erith Town Centre

Aspect	Responses from Erith (Zone 2)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Close to home	52.5%	41.4%	46.3%
(Nothing / very little)	8.1%	16.3%	18.2%
Good range of non-food shops	20.5%	13.3%	14.9%
Easy to park	9.2%	7.0%	7.9%
Other	6.1%	6.3%	7.0%
Good range of 'High Street' retailers / multiples	4.9%	4.6%	5.2%
Attractive environment / nice place	4.8%	4.6%	5.2%
Good food stores	4.7%	3.8%	4.2%
Free parking	3.0%	2.7%	3.0%

Source: HTIS 2018

Table C9: Key Improvements for Erith Town Centre

Aspect	Responses from Erith (Zone 2)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
(Nothing)	57.2%	47.2%	55.8%
More / better comparison (non-food) retailers	8.0%	11.5%	13.6%
More high street retailers	13.1%	10.6%	12.5%
More / better food / convenience retailers	13.5%	7.2%	8.5%
More independent retailers	7.7%	6.8%	8.1%
Other	6.0%	5.0%	5.9%
More / better retail in general	5.5%	4.7%	5.6%
(Don't know)	5.6%	3.0%	3.5%
More / better traditional retailers	4.5%	2.4%	2.8%
More / better leisure offer	1.2%	1.7%	2.0%

Source: HTIS 2018

SIDCUP MAJOR DISTRICT CENTRE

Table C10: Frequency of Visits to Sidcup Town Centre

Frequency	Responses from Sidcup (Zone 6)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Daily	3.9%	3.4%	2.5%
4-6 days a w eek	6.8%	5.9%	3.9%
2-3 days a w eek	23.6%	21.4%	12.7%
One day a w eek	30.7%	34.4%	22.3%
Every tw o w eeks	7.9%	9.8%	6.9%
Monthly	6.7%	6.3%	11.9%
Once every tw o months	5.8%	5.1%	8.8%
Three-four times a year	1.3%	2.1%	2.6%
Once a year	0.7%	0.6%	2.7%
Less often	1.3%	1.1%	1.8%
Never	10.7%	9.4%	23.6%
(Don't know)	0.0%	0.0%	0.0%
(Varies)	0.6%	0.5%	0.3%

Source: HTIS 2018

Table C11: Reasons for Visiting Sidcup Town Centre

Aspect	Responses from Sidcup (Zone 6)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Close to home	48.3%	46.7%	35.4%
(Nothing / very little)	19.5%	18.2%	20.5%
Attractive environment / nice place	7.2%	10.7%	7.9%
Good range of non-food shops	0.7%	4.5%	6.9%
Other	4.4%	4.4%	5.3%
Good pubs, cafés or restaurants	6.9%	6.6%	5.1%
Compact	6.5%	5.7%	4.4%
Good range of independent shops	1.6%	2.5%	4.3%
Easy to get to by car	0.8%	0.7%	4.3%

Source: HTIS 2018

Table C12: Key Improvements for Sidcup Town Centre

Aspect	Responses from Sidcup (Zone 6)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
(Nothing)	33.9%	26.7%	45.4%
More high street retailers	30.8%	19.3%	20.7%
More independent retailers	29.2%	18.0%	19.6%
More / better retail in general	21.2%	16.0%	18.4%
Other	13.8%	8.8%	9.3%
More / better comparison (non-food) retailers	8.6%	5.7%	7.0%
More / better restaurants / cafés	0.0%	0.4%	4.7%
More / better niche or specialist retailers	1.6%	1.7%	2.5%
More / better leisure offer	3.1%	1.9%	1.9%
More / better food / convenience retailers	2.7%	1.7%	1.7%

Source: HTIS 2018

WELLING MAJOR DISTRICT CENTRE

Table C13: Frequency of Visits to Welling Town Centre

Frequency	Responses from Welling (Zone 3)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Daily	23.5%	20.5%	19.8%
4-6 days a week	4.1%	3.6%	3.5%
2-3 days a week	21.9%	20.0%	19.3%
One day a week	23.2%	22.6%	21.8%
Every two weeks	11.5%	12.8%	12.4%
Monthly	6.6%	6.5%	6.3%
Once every two months	0.0%	0.0%	0.0%
Three-four times a year	0.8%	1.6%	1.5%
Once a year	0.0%	0.7%	0.7%
Less often	0.0%	0.9%	0.8%
Never	7.8%	9.6%	12.6%
(Don't know)	0.6%	0.6%	0.5%
(Varies)	0.0%	0.7%	0.7%

Source: HTIS 2018

Table C14: Reasons for Visiting Welling Town Centre

Aspect	Responses from Welling (Zone 3)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
Close to home	50.9%	42.8%	45.2%
(Nothing / very little)	12.7%	14.0%	14.8%
Attractive environment / nice place	8.0%	10.4%	11.0%
Good range of non-food shops	7.9%	8.3%	8.8%
Other	8.0%	6.7%	7.1%
Good pubs, cafés or restaurants	6.5%	5.5%	5.8%
Compact	5.7%	4.8%	5.1%
Good range of independent shops	3.7%	4.0%	4.3%
Easy to get to by car	4.0%	3.4%	3.6%

Source: HTIS 2018

Table C15: Key Improvements for Welling Town Centre

Aspect	Responses from Welling (Zone 3)	Responses from Borough (Zones 1-6)	Responses from Study Area (Zones 1-8)
(Nothing)	49.4%	43.5%	54.1%
More high street retailers	29.1%	20.8%	25.9%
More independent retailers	16.8%	12.0%	15.0%
More / better retail in general	11.5%	8.2%	10.2%
More / better restaurants / cafés	8.6%	6.1%	7.6%
More / better comparison (non-food) retailers	3.7%	2.6%	3.3%
Open a Marks & Spencer store	2.9%	2.1%	2.6%
(Don't know)	1.6%	1.9%	2.3%
Other	2.3%	1.6%	2.0%
More / better pubs / bars	1.6%	1.2%	1.5%

Source: HTIS 2018

APPENDIX D: ACCESSIBILITY & PARKING

TABLE 1a: BEXLEYHEATH - MAIN BUS ROUTES

Bus Service	Bus Route
B15	Towards Horn Park
B16	Towards Kidbrooke
89	Towards Lewisham Shopping Centre / Slade Green Station
B11	Towards Thamesmead
96	Towards Bluewater / Woolwich
422	Towards North Greenwich
486	Towards North Greenwich
B12	Towards Erith / Joyden's Wood
B14	Towards Orpington Station
296	Towards Romford Station / Ilford Broadway
B13	Towards New Eltham
99	Towards Woolwich
401	Towards Thamesmead
132	Towards North Greenwich
229	Towards Thamesmead / Queen Mary's Hospital
492	Towards Bluewater / Sidcup

Source: Bexley Council / Various

TABLE 1b: BEXLEYHEATH - MAIN CAR PARKS

Car Park	Spaces
Broadway Shopping Centre	956
Bexleyheath Station	80
Sainsbury's (customers only)	11
Avenue Road Car Park	240
Bowling Centre	236
Oaklands Car Park	134
Danson Stables Car Park	170
Broadway Square	342
Albion Road	323
Nag's Head Lane	86
Cineworld Cinema	236
TOTAL: 11	**2,814**

Source: Bexley Council / Various

TABLE 2a: CRAYFORD - MAIN BUS ROUTES

Bus Service	Bus Route
96	Towards Bluewater / Woolwich
492	Towards Bluewater / Sidcup
428	Towards Bluewater / Erith

TABLE 2b: CRAYFORD - MAIN CAR PARKS

Car Park	Spaces
Sainsbury's	477
Crayford Station	125
Crayford Island Retail Park	156
Tower Retail Park	390
TOTAL: 4	**1,148**

TABLE 3a: ERITH - MAIN BUS ROUTES

Bus Service	Bus Route
99	Towards Bexleyheath / Woolwich
229	Towards Thamesmead / Queen Mary's Hospital
428	Towards Bluewater / Erith
602	Towards Thamesmead / Townley Grammar School
669	Towards Thamesmead / Cleeve Park School
B12	Towards Erith / Joyden's Wood
N89	Towards Trafalgar Square

TABLE 3b: ERITH - MAIN CAR PARKS

Car Park	Spaces
Morrisons	670
Erith Riverside Shopping Centre	147
TOTAL: 2	**817**

TABLE 4a: SIDCUP - MAIN BUS ROUTES

Bus Service	Bus Route
286	Towards Queen Mary's Hospital
233	Towards Eltham / Swanley
160	Towards Catford Bridge
51	Towards Orpington Station / Woolwich
229	Towards Thamesmead / Queen Mary's Hospital
269	Towards Bexleyheath Shopping Centre / Bromley North
492	Towards Bluewater / Sidcup
321	Towards New Cross Gate / Foots Cray Tesco
R11	Towards Queen Mary's Hospital / Green Street Green
B14	Towards Bexleyheath Shopping Centre / Orpington Station

TABLE 4b: SIDCUP - MAIN CAR PARKS

Car Park	Spaces
Grassington Road	187
Main Road	116
Morrisons	290
Sidcup Place	53
Sidcup Station	267
Old Farm Avenue	164
TOTAL: 2	**1,077**

TABLE 5a: WELLING - MAIN BUS ROUTES

Bus Service	Bus Route
B15	Towards Horn Park
B16	Towards Kidbrooke
89	Towards Lewisham Shopping Centre / Slade Green Station
51	Towards Orpington Station / Woolwich
486	Towards North Greenwich
96	Towards Bluewater / Woolwich

TABLE 5b: WELLING - MAIN CAR PARKS

Car Park	Spaces
Westwood Lane Car Park	155
Nags Head Lane Car Park	86
Welling Station Car Park	112
TOTAL: 3	**353**