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Town Centres Strategy

Town Centres Team

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Introduction

Town Centres are a key part of the Council's overall strategy for delivering good growth in the borough. They provide identity and personality and are places where residents live, work, learn, shop and socialise.

Town centres are key drivers of the local economy providing approximately 31% of the Borough's Gross Value Added (GVA) (£1.56 billion per annum). Businesses in Bexley's five main town centres employ between them 23,300 people – a third of the borough's total employment[i]. Between 2013 and 2018 – the total number of employees in these centres has increased by 11% and there is a 12.5% increase in the number of businesses[1]. The key driver for the development of this strategy is therefore to propose measures which will protect and maintain this growth.

In the London Plan, Bexley has five main town centres – Bexleyheath is defined as a Major Centre and Crayford, Erith, Sidcup and Welling as Districts (highlighted in Figure 1)[2]. Bexleyheath has a diverse offering that includes retail, offices, leisure and entertainment facilities, while the District Centres tend to meet a more local need.

Nationally, town centres are seeing rapid and significant change, driven by a combination of economic pressures, technological change and consumer behaviour. This has resulted in a net loss of over 2500 stores from Britain's top 500 high streets during 2018, with the trend forecast to continue. Bexley's town centres are not immune from the change sweeping through high streets across the UK.

National research shows that people increasingly come to town centres for the experience, whether it is to shop, eat or socialise. It is quality of customer experience which is a major driver of footfall, dwell time and spend in successful town centres. Many places are already heavily investing in improving town centres – without concerted effort to help them adapt, Bexley's town centres could be left behind.
The character of a town feeds into residents' sense of place and pride in their area. The reputation of a town centre as an attractive and profitable place to do business will boost inward investment, whilst a poor or declining reputation will have the opposite effect – feeding into a negative spiral of under-investment and decline.

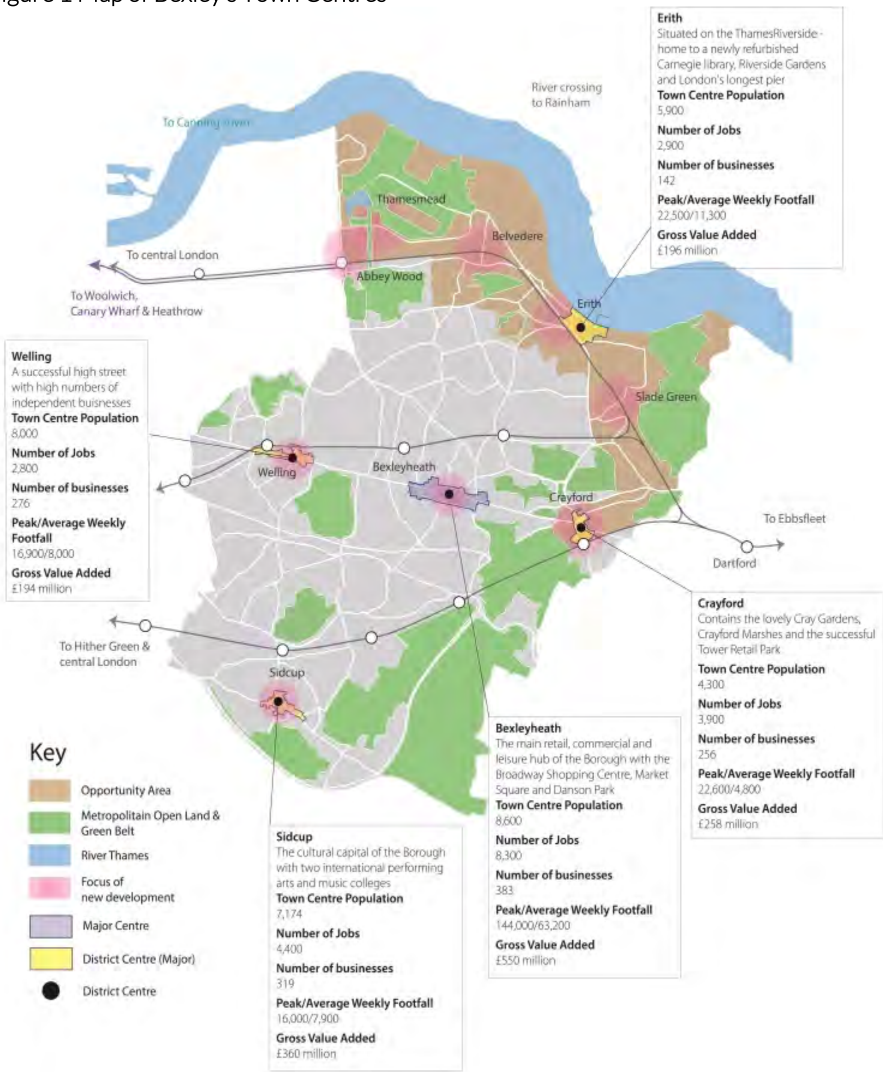
The Town Centres Strategy is focussed on the former with an emphasis on the five Major and District town centres in Bexley – Bexleyheath, Crayford, Erith, Sidcup and Welling. Not only are these where the bulk of the businesses are based, but research suggests that middle-ranking major and district centres are more vulnerable to national trends than smaller local centres (which in Bexley are in general still trading well), as major national retailers are becoming increasingly selective in choosing locations to invest.

The Bexley Town Centres Strategy seeks to safeguard and enhance our key town centres and further develop a positive engagement with all users and stakeholders, including businesses, investors and residents.

[1] The Town Centre Businesses with 1 or 0 employment numbers have been excluded in this analysis due to the high percentage of these being self-employed who are registered to an address, but to not physically work in the town centre.

[2] Throughout this Strategy, for the purposes of data collection and analysis, the geographic boundary of the 5 main town centres is taken to be that shown in the Bexley Unitary Development Plan (UDP), except in the case of Sidcup which functionally also includes Station Road neighbourhood centre.

Figure 1 Map of Bexley's Town Centres



Purpose

This Strategy is designed to provide a vision and action map for the improvement of Bexley's main town centres over the next five years. It has a primary focus on unlocking barriers to growth and promoting economic development – so that both new and existing businesses in town centres can be successful in generating new wealth and employment. It is targeted at stakeholders and key partners, who will play a significant role in enhancing the towns' vibrancy and economic success. Figure 4 (pg. 5) provides an overview of how important it is that different relevant strategies work together.

The purpose of the Strategy is not to provide a detailed, fully costed action plan, but rather – based on the research – to suggest a direction of travel for how the Council and its partners (including business groups (e.g. BIDs), landlords and leaseholders of town centre premises and community organisations) might best work together to safeguard and enhance the economy of the borough's town centres. This involves setting out some key priorities for action. With a shared commitment, the priorities will then need to be developed into a tested, costed and funded action plan before the Strategy programme can be fully rolled out over the coming 5 years.

A key part of the Strategy is to define ways in which the Council can work with stakeholders (especially business occupiers) to increase the attractiveness and functionality of town centres, and in doing so tap into a wider range of resources to effect change. This will include working closely with the existing Business Improvement Districts (BIDs), but also working with businesses in other locations to build their collective capacity, potentially exploring the feasibility of developing further BIDs, whilst being open-minded about other partnership and funding models.

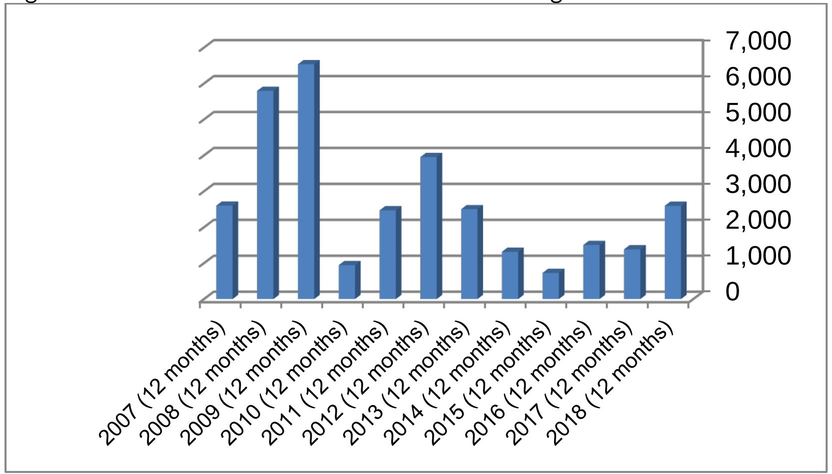
Details of the methodology, including the data collection and consultation processes are provided in Appendix A. Potentially unfamiliar technical terms are explained in the Glossary (p55).

Changing Town Centres across the UK

It is impossible to ignore the succession of news stories regarding national retail chain failures over the past few years. These failures have resulted at the very least in rescue measures and down-sizing or, more frequently, national store closures programmes. 2018, for example, saw the disappearance of many household names – such as Maplin, Poundworld and Toys R Us.

According to the Centre for Retail Research, during that year the number of medium or large retail businesses going into administration exceeded 40, closing over 2500 stores and impacting 46,000 jobs. This puts it on course to be the worst year for store closures since 2013 (see Figure 2). [ii].

Figure 2 UK Store Closure Trends from medium to large retailers

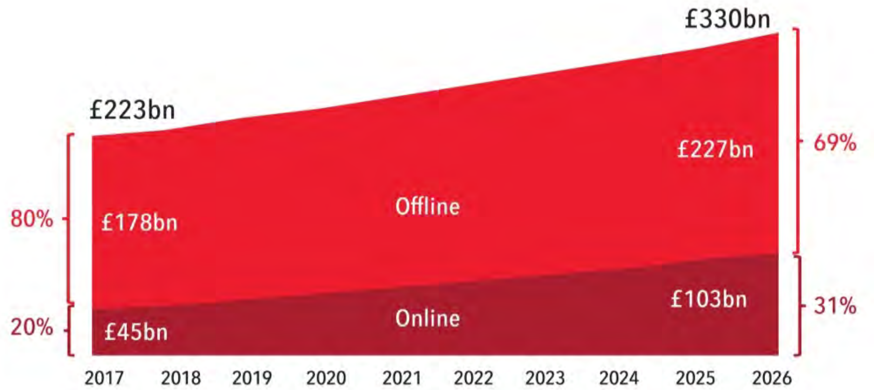


Industry bodies including the British Retail Consortium[iii] have highlighted a number of dynamics that are putting operators of national retail and food and beverage outlets under unprecedented pressure, driving the rapidly changing landscape for town centres. They describe a 'perfect storm' of conditions, including:

- Slow economic recovery / weak growth following years of deep recession
- Declining household disposable income
- Low consumer and business confidence – worsened by continuing economic uncertainty
- Growing competition from internet retailers and the steady growth of online shopping
- Higher costs for traditional town centre occupiers (e.g. rising business rates, weaker pound, national living wage etc.)

The perception by many is that the rise of online shopping will lead to the final demise of the high street. However, as is illustrated in Figure 3, the amount spent on retail – even in store – is still expected to rise between now and 2026 even though the proportion of sales being transacted online are expected to increase to 31%[iv]. The Grimsey Review, whilst acknowledging the scale of the challenge, has highlighted that there is hope for high streets if they can be helped to adapt to the new, very different trading environment, where consumers will visit town centres for more than retail alone[v].

Figure 3 UK Comparison Goods Spend by location of transaction (£billions)[vi]



> *"The way people shop is changing. Shopper missions are polarising with more destination trips and fewer convenience trips. This is causing declining footfall and the rise of 'experience'."* CACI - Retail Landscape (2018)

The successful future high street is likely to be driven by demand for quality and diverse social spaces, good customer service in a pleasant and safe environment and strong digital connectivity. The way customers approach purchasing has becoming increasingly complex involving both online and offline channels. For example, in2017, the sectors that saw net increases of outlets on the high street were those intrinsically linked to experience and service (e.g. barbers and cafes).[vii]

The key message to take from this is the current changes are not a temporary phenomenon, but signs of lasting structural change, and that for town centres to survive and thrive in the future, coordinated action and investment by key stakeholders (including Local Authorities) is required to help create the town centre experience required to compete in this new environment.

While this Town Centre Strategy has a focus on unlocking barriers to growth and promoting economic development, town centres are cross-cutting and diverse and will require coordination with other Council strategies. How the Town Centres Strategy contributes and relates to other keys strategies is shown in Figure 4 outlined below.

Figure 4 Overview of relevant strategies

Strategy/Policy	Time Frame	Economic Development	Business Growth	Land Use Planning	Development site allocation	Housing	Transportation	Community Infrastructure	Health	Social Infrastructure (e.g Education, Social Care)
Bexley Town Centre Strategy	**5-years (2024)**	L	L	S			S	S	S	
Local Plan (Under revision)	15 years (2035)			L	L	S	S			
Town Centre Master Plans (e.g. OAPF and Bexleyheath)	15-30 years		S	S	S	S	S	S		
Local Implementation Plan - Delivery Plan	3 years (2022)						L			
Bexley Housing Strategy (Draft)	5 years (2024)				S	L				
Bexley Prevention Strategy (Draft)	5 years (2024)	S		S			S		L	
Bexley Obesity Strategy (Draft)	5 years (2024)								L	
Bexley Connected Communities Strategy (Draft)	5 years (2024)		S					L	S	S
Bexley Physical Activity Strategy (Draft)	5 years (2025)						S	S	S	
Social Infrastructure Strategies (e.g. Social Care, Education, Employment)	5-10 years									L
Bexley Corporate Plan	8 years (2025)	O	O	O	O	O	O	O	O	O
Bexley Growth Strategy	30+ years (2050)	O	O	S	S	S	O			O
London Plan	20-25 Years	O	O	O	O	O	O	O	O	O
Mayors Transport Strategy	25 years (2041)						O			

O	Overarching responsibility
L	Lead Strategy in the Borough
S	Supports strategic aims in this respect

Corporate Strategy

The overarching Council strategy is the Corporate Strategy ('Brilliant Bexley: Shaping our future together 2017 to 2025'). The Town Centres Strategy will contribute to the five themes of the Corporate Strategy in a wide range of ways:

- 'Growth that benefits all' – This is the primary area where the Town Centres Strategy will contribute, by helping to maintain and enhance our town centres as places to start, run and grow a business, and by creating environments that will be attractive to current and future residents, shoppers and visitors.
- 'Clean and green local places' – The Town Centres Strategy will seek to build on these and ensure that they are enhanced, protected and celebrated. It will encourage initiatives to improve walking and cycling routes from town centres to green spaces, reduce littering, and improve standards of cleanliness.
- 'Strong and resilient communities and families' - The Strategy will support initiatives to ensure that town centres are safe places to go and that people feel safe both day and night, and those at risk are protected from avoidable harm.
- 'Innovation and self-sufficiency' – The Strategy will explore innovative solutions to ensure that our town centres can remain competitive and viable. Included in this will be how the Council utilises its own assets, not only to generate revenue income, but also to benefit the local economy.
- 'Living Well' – The Strategy will support initiatives to improve the health and well-being of residents and visitors to our town centres, including the creation of safe and healthy environments that are easy to access by various modes of transport.

Growth Strategy

The Bexley Growth Strategy sets out how the Council will meet the key ambition for 'Growth that benefits all'. It envisages significant development by 2050 particularly in the Opportunity Areas concentrated on the north of the borough. However, the delivery of the Growth Strategy is predicated on significant transport and infrastructure improvements, including the C2E extension and improvements to north-south linkages within the borough. With that caveat in mind, the Growth Strategy has the following ambitions in relation to existing town centres:

- Erith will grow by up to 6,000 new homes and 2,000 new jobs;
- Crayford will grow by up to 1,000 homes and 1,000 jobs;
- Bexleyheath will grow by up to 1,500 new homes and 1,500 new jobs.
- Welling will grow by up to 400 new homes and 800 new jobs.
- Sidcup will grow by up to 400 new homes and 1,000 new jobs;

This growth will lead to increased town centre populations and workforces, with potentially shifting demographics. Town centres must accommodate these changes, while enhancing the quality of life for their current users and residents.

Local Plan and other Planning frameworks

Local Plans set out the long-term development strategy of an area and is the most significant Local Authority planning document. Local Plans identify housing locations and targets; the locations for business expansions; areas for regeneration; locations for new shops and leisure activities and areas to be protected from development. Bexley's Local Plan for growth and development is now being prepared for the next 20 years, up to 2040. The boundaries of each town centre are expected to be re-drawn as part of the new Local Plan proposals. This is likely to result in smaller, more concentrated town centres.

The Town Centres Strategy will play a part in shaping the developing Local Plan. However, the Plan is long-term in nature, focussing on outcomes at a 15 or 20-year time horizon. The Bexley Town Centres Strategy is complementary but focuses on actions which the Council and its partners can realistically deliver during a short-to-medium (up to 5 year) timeframe. The Strategy will be regularly monitored and reviewed to ensure that an appropriate rolling programme of support and improvement is maintained in the priority towns alongside the unfolding spatial development strategy.

The Council is also developing a Masterplan for Bexleyheath and Opportunity Area Planning Frameworks (OAPF) for the parts of the borough designated as Opportunity Areas by the Mayor of London (which includes Erith town centre). Other elements of the Council's policy framework that will touch on town centres include the Local Implementation Plan on travel policies, the Parking Strategy and the emerging Prevention Strategy. All planning and policy frameworks need to take account of the Mayor's London Plan, both the current and the new (draft) London Plan and the Mayor's Transport Strategy.

Housing Strategy

The Housing Strategy is the Council's vision for housing during and beyond the strategy period. It is being developed now and will include the Council's approach to provision of affordable housing for local people, housing for older people requiring additional care, estate renewal and tackling homelessness.

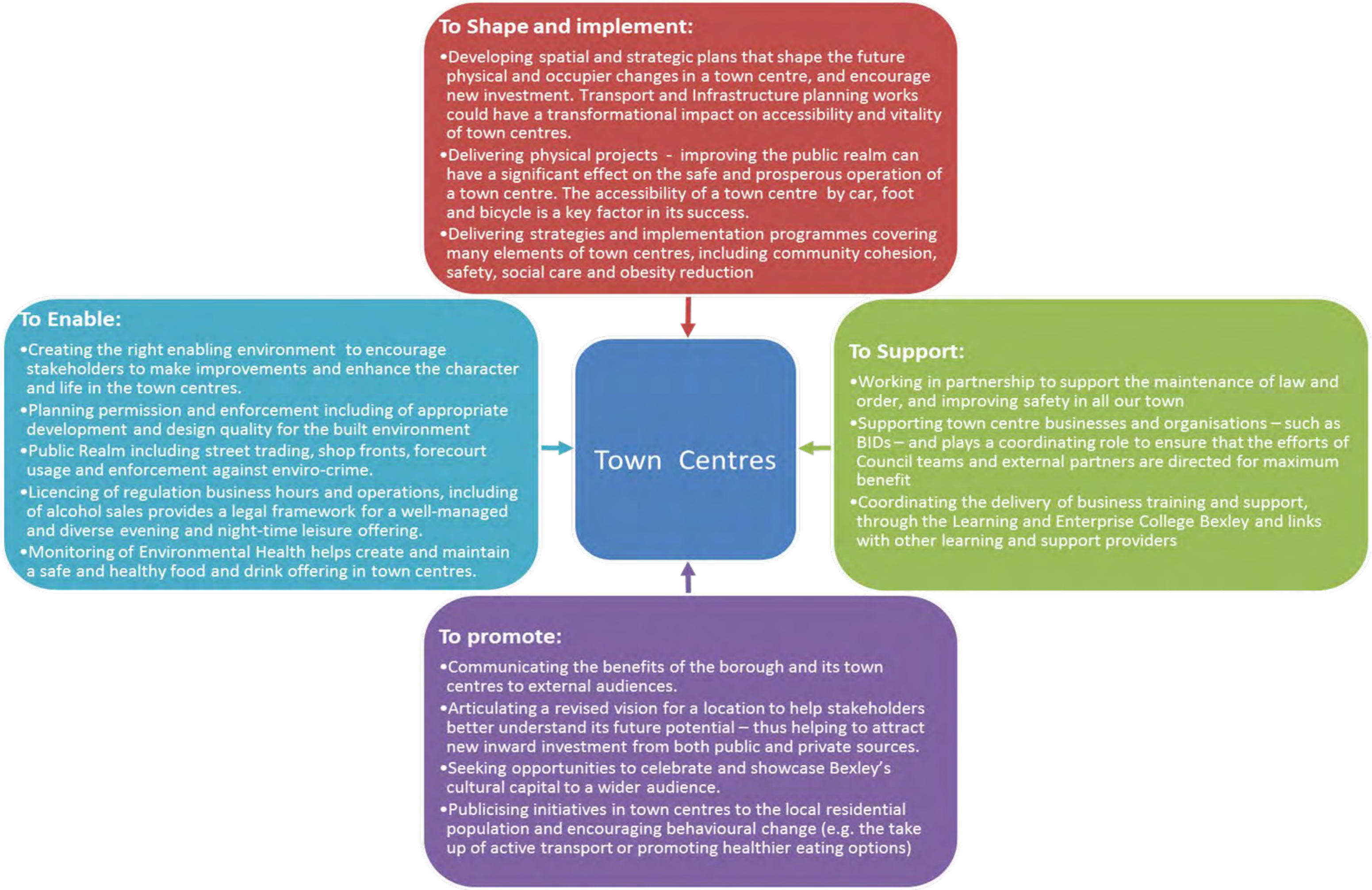
Prevention Strategy

The Prevention Strategy (Draft) interprets prevention in its broadest context where it not only covers health and social care, but also includes communities, social cohesion, crime, built and natural environments - green and blue spaces, work places, homes and the local economy.

The Council's role in shaping town centre change

The Council shapes and influences town centres in a variety of ways. The Council's impact on services and initiatives can be summarised as four key roles as seen in Figure 5.

Figure 5 Roles Bexley Council plays in shaping town centres



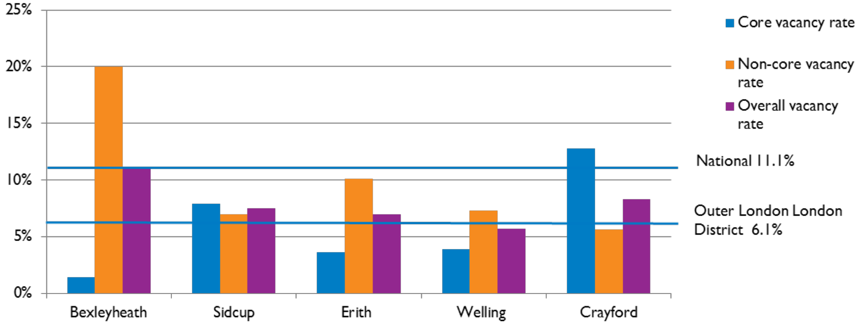
Common themes

There are a number of issues and themes which are common to most of Bexley's town centres. These are explored in more detail below.

Business health and inward investment

Despite the national retail pressures, Bexley's town centres have been relatively resilient so far, with all of the town centres having vacancy rates (as at Spring 2018) that are below the national average, but above the equivalent London averages (Figure 6).

Figure 6 Vacancy rates in Bexley's town centres



However, the national trends are starting to be felt in the borough, with vacancies occurring in various town centres due to national retail failures and contractions. Sidcup is at a particular risk from the national trend of bank closures due to having eight banks within 300m on the High Street. This is in the context of the loss of 3000 bank branches nationally between 2015 and June 2018[viii].

When comparing the survey results for business performance over the previous three years for four categories (revenue, profit, footfall and employment numbers) to a similar survey in 2013, all the town centres had improved business performance, with localised exceptions of decreased footfall in Bexleyheath and Welling and decreased reported employment numbers in Crayford.

Independent businesses give a town centre its unique flavour and can often provide a more personal service to customers – which in turn drives consumer loyalty and footfall. Helping independent town centre businesses thrive should therefore be a key ingredient of any action plan for a successful high street.

Digital economy

76 % of town centre businesses have a website
56% of businesses have a social media strategy

Having a strong digital presence is important for businesses to draw customers into the high street. Google reports that 76% of people who search on their smartphone for something nearby will then visit a related business or retailer within a day, and 28% of those searches result in a purchase. Additionally, 88% of shoppers carry out smartphone research before making a purchase.[ix]

Bexley's town centre businesses vary in their digital presence – three quarters of surveyed town centre businesses have a website and similar numbers also have a social media presence.

Of the surveyed businesses worried about loss of business to online competitors – 90% have websites, 85% have a social media presence and 70% have a social media strategy.

This online presence of businesses does not seem to be effectively linking to customers – Crayford has the highest level of town centre website users at 64% and Sidcup had the highest Facebook uptake at 42%. Welling was the lowest with 44% website and 25% Facebook uptake with town centre users.

Bexley is currently ranked 10th out the London Boroughs in terms of percentage of the population who use the internet at 94%[x]

Bexley adopted its digital strategy 'Delivering a Step Change in Bexley's Digital Infrastructure' in 2017. It aims to ensure that the Borough has high quality fixed line, mobile and wireless connectivity, which is a core aspect underpinning Bexley's Growth agenda. Key elements of this digital strategy include:

- Creating the right environment for the rollout of more fibre delivering ultrafast, gigabit services to premises;
- Making public Wi-Fi services more widely available across the borough and
- Putting the right foundations in place to enable mobile operators to roll out high speed 4G and 5G mobile services in a speedy and cost-effective manner.

Town Centre Experience

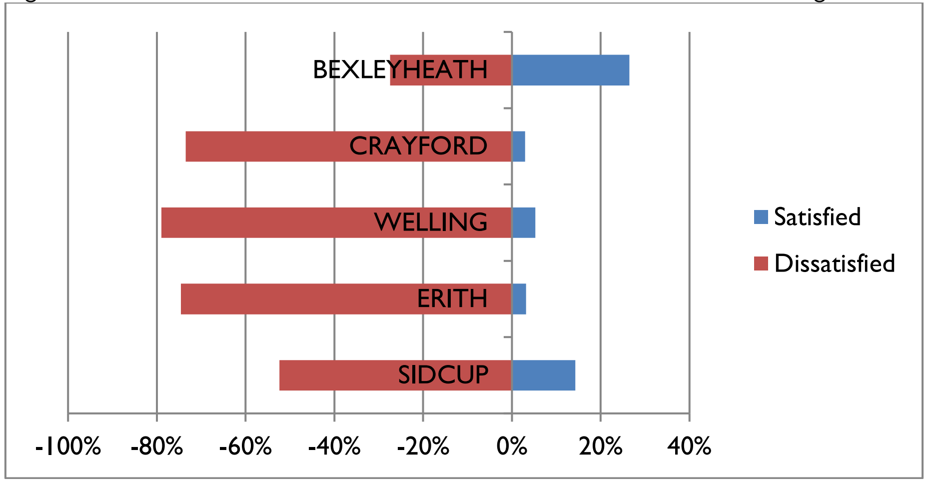
As national trends show, increasingly people are using town centres more as places to socialise and spend their leisure time than purely for shopping. Therefore, the quality of the leisure offer and overall experience in town centre locations is becoming a key factor in their success.

The town centre experience can be broken down into a number of elements:

Diversifying the retail and leisure offer

As can be seen from Figure 7, Bexleyheath had the highest level of satisfaction, with just over 25% satisfied with the culture and leisure[3] offering and Sidcup had only 15% satisfaction, while Welling, Crayford and Erith all had over 70% of respondents reporting dissatisfaction.

Figure 7 Town centre user satisfaction levels with the culture and leisure offering

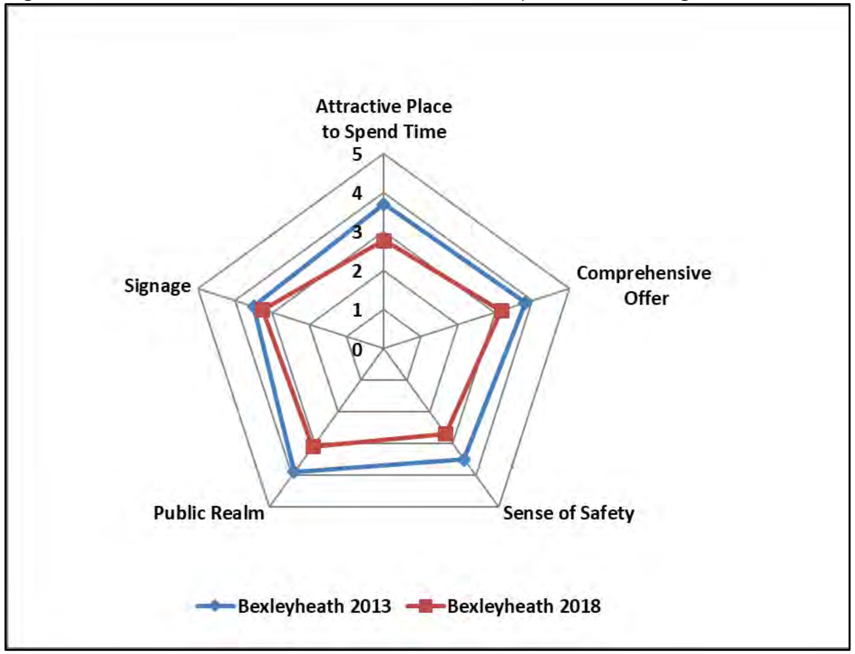


Probing further, people were happiest with the café and restaurant offering, where in Bexleyheath, Sidcup and Welling there was over 50% positive satisfaction, while in Crayford and Erith, these were still low at 35% and 25% respectively.

A lack of diversity and quality in the town centre offer reduces its attractiveness is a barrier to its success. The evidence points to reduced levels of satisfaction with the offer in all our town centres, compared to five years ago. The graph in Figure 8 shows an example drawn from research on Bexleyheath users, which shows deterioration in the satisfaction in each area of the town's offerings apart from in respect of Personal Services.

[3] The culture and leisure offering includes food and beverage, active leisure and recreational activities (e.g. gyms, bowling), art and performance spaces and cinemas.

Figure 8 Town centre user's satisfaction with Bexleyheath's offering



The offering for families and younger residents (both teenagers and young professionals) was something reported by respondents to be needing significant enhancement.

Place making and public realm

With increasingly fierce competition for customers time and disposable income from the internet and out-of-town shopping centres, we need to ensure our towns present a compelling reason to visit.

A well designed and maintained public realm can encourage people to adopt active and healthier lifestyles and remain socially active. This links closely with the Council's emerging Prevention Strategy.

The cleanliness of the public realm has a significant role to play – CACI found that in town centres that had high attractiveness ratings by users, had higher levels of spend, for example town centres with a cleanliness rating of 5 (out of 5) rather than a 1-3, had shoppers spending 36% more and similarly a public amenity rating of 5 resulted in16% more spend than a 1-3 score.[xi]

Connectivity and Wayfinding

User research shows that in Bexley's towns the car dominates as a means of transportation into each centre. This has consequences with regards to congestion, pressure on car parking spaces and reduced air quality. Users identified that improvements to wayfinding, bike parking facilities, safer and more attractive cycle and walking routes into and out of the town centres, and improved bus offer would increase the uptake of active transport. This in turn could have a beneficial effect on the vitality of high streets. Recent research commissioned by TfL suggests that people walking, cycling and using public transport spend most in their local shops – in fact 40% more than car users[xii]. Nevertheless, with Bexley's low public transport connectivity, it is expected that the car will remain the primary mode of town centre access. Therefore, good car parking management will continue to play an important role.

A number of Bexley's towns suffer from poor linkages with railway stations and adjacent residential areas. Inadequate wayfinding to assist town centre visitors find their way around is compounded in some of our towns by poor legibility and barriers to easy pedestrian circulation, especially by people with reduced mobility.

Accessibility and Inclusivity

It is important that all users have a positive experience in Bexley's town centres, including those with physical or mental disability or impairments. It is important from both a social inclusivity and a business point of view with the Purple Pound worth an estimated £249 billion to the UK Economy.[xiii]

Bexley's town centres have a range of initiatives including a weekly quiet hour in the Broadway Shopping Centre, a network of businesses signing up to be Dementia Friends and a programme of Changing Places Toilets. Further work is required to make the town centres more accessible and inclusive to all users, for example, training for business about disability awareness and lobbying for step free access to. Crayford and Erith railway stations

As Bexley's town centres are increasing in diversity, it is important that they cater to the full spectrum of all potential users. The Chinese New Year event and Windrush Festival in 2018 are good examples of where this has been already successfully been done.

Events, markets and meanwhile use

Across the five town centres, there were low levels of satisfaction with the frequency of special events and markets and with the nature of those that were held. Regular special events and markets, especially if community based, provide a distinctive flavour to a location and can be an effective driver of footfall.

Public events are also a good way to develop more active links between the businesses and wider community. They can provide a test trading environment for new businesses, and as trailblazers for new culture and leisure concepts.

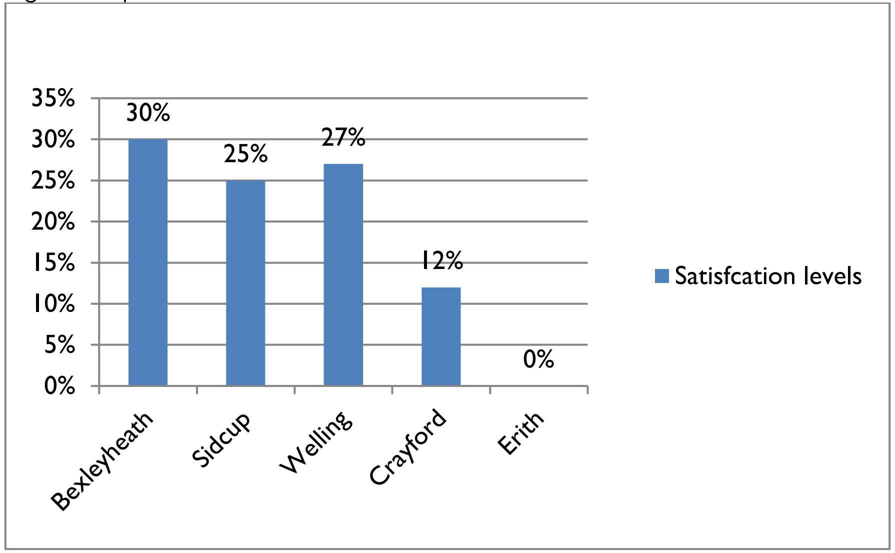
Evening and Night Time Economy

Part of town centre experience is the evening and night time economy – this consists primarily of the culture and leisure offer (including food and beverage venues) and covers both evening (6-10pm) and late-night (10pm onwards). Across all the towns there are low levels of satisfaction with the Evening and Night Time Economy offering.

Bexleyheath has the 17th largest NTE in Greater London by floor space – ahead of even Brixton (GLA, 2017)

Bexleyheath is the hub of Bexley's evening and late–night economy, concentrated in the western end of the Broadway. It has restaurants and bars, along with more family friendly activities of a cinema and bowling alley. Despite its large NTE economy footprint and being the Borough's NTE hub, only 30% of people were satisfied with the offering and in Erith there were no satisfied responses, with over half (52%) classified as very unsatisfied.

Figure 9 Reported satisfaction levels of town centre users with the NTE



Associated with a successful evening and night-time economy is a perception of safety and security. Based on reported crime statistics, Bexley's town centres are safe compared with similar size centres across Greater London. However, the survey data shows that there is a mismatch between the reality and perception, and this may be a barrier to the development of a healthy and diverse evening and night-time economy.

Place marketing

Each of Bexley's town centres has unique selling points (USPs) and characteristics – Erith enjoys the proximity of the River Thames while Sidcup with its winding High Street can build further on the proximity of its performing arts colleges. However, the borough's town centres have limited brand recognition in their potential catchment areas across SE London and Kent. Whilst individual organisations and businesses in the town centres undertake marketing activities across a spectrum of media – there is no overall coordination of either message or approach across the various partners.

There is therefore a need for each town's USP to be fully understood by all partners and for joint efforts to promote each town to be coordinated around a consistent, agreed brand. With today's increasingly tech savvy consumers, the branding needs to include each towns' online presence – including website and social media content - increasingly used to attract both consumers and prospective businesses.

Success stories in Bexley to build on

Bexley has previously invested in its town centres in various ways and some of the approaches suggested in this Strategy have been piloted before in the borough. For example, Sidcup had a total of £3.4m (£1.2m of which was from the GLA) invested in a comprehensive programme designed to reverse a cycle of decline which had seen vacancy rates on the High Street reach record levels. A public realm scheme was successful in significantly improving user perception of the attractiveness of Sidcup - and this aspect of the town centre is still appreciated by users according to the 2018 survey.

The business support part of the scheme included inward investment incentive grants, shop front improvements, expert advice for existing business owners and the set up and hosting of a pop-up shop 'Sidcup & Co' which incubated at least 48 new businesses, and was the genesis of four independent businesses still trading on Sidcup High Street in 2018. The scheme also helped to encourage the location of 8 new businesses onto the High Street including anchor tenants such as Little Waitrose and Better Gym – and significantly reduced vacancy levels by the end of the programme.

More recently Bexley Council has also been investing in Erith town centre – over £10m (£2.3m of which is Council spending) has been spent or allocated since 2016 – to start to unlock the potential of the town and work with the community to create a thriving riverside community. This will be by rejuvenating existing spaces, enabling new developments and nurturing innovation.

The programme encompasses a number of key projects including improvements to the road network and public realm to enable walking and cycling through the Erith Links project, and the renovation and reopening of the town's Carnegie Library building as an arts space and cultural hub. A programme of 'meanwhile' pop-up food and social events have energised the town centre and provided much needed leisure activities as well as testing key ideas for Erith's future.

This included the Erith Lighthouse, a 'pop up' café and restaurant, in the Riverside Gardens and the base of the pier in summer 2017. Pier Road hosted the Erith Kitchen food events and the first Erith Pier Festival was held on the pier. The events have been increasingly popular and supported by an enthusiastic social media following for the programme as well as starting conversations about the town and encouraging people to make the most of one of Erith's key assets – the River Thames.

Examples from other town centres in the UK

There are many UK town centres that have implemented successful measures to improve their town centre performance across these common themes. A selection of case studies has been detailed below to provide examples of potential interventions.

Deptford – Improving experience and supporting businesses

With thousands of new homes planned for Deptford, the GLA invested £1.5m, matched by £732,000 from the Council, for a series of projects to prepare Deptford's high street for the future. Despite being at the centre of a vibrant music and arts scene, the high street was rundown with poor pavements and a market not fulfilling its potential.

High street improvements were focussed on making the street more appealing and able to cope with increased footfall. The main project themes were as follows:

- Animating spaces - through special events – especially linked to food and cooking
- Public spaces – high street improvements including improved lighting, shared surfaces, and a new open space to provide a setting for themed markets and seasonal events.
- Building frontages - Six shops were paired with local designers and artists to introduce improvements to shop fronts and window displays
- Supporting businesses - Council set up a free training scheme to offer opportunities to get into market trading
- Preparing for change - A number of feasibility studies are helping Lewisham Council make plans for the future of Deptford – including a review of requirements for parking and loading

The regeneration project has delivered major improvements for residents, visitors and shoppers. Deptford now offers better educational and leisure facilities and the Deptford Lounge provides a new focal point for community activities. The town centre's image has been further enhanced by its contemporary new station building with its steel framework and glass facades.

Rotherham – Supporting businesses

Rotherham Borough Council from 2009 onwards developed an approach to its town centre – which had been suffering from a high level of vacancies. It focussed on supporting small and distinctive retailers. The Council scheme included:

- Establishing Rotherham Investment and Development Office (RiDO) (started with £100k match funds) as a separate arm of the Council (www.rido.org.uk) – providing free business support to start up and established businesses.

- Business Vitality Grants – grants for eligible niche retailers – providing 50% towards rental costs in the first year and 25% in the second, plus help towards retail fit-out costs
- Test-trade in the makers' emporium – offering space to local makers, designers, artists and craftspeople.

As a result of the programme:

- Vacancy rate decreased from 20% to 14% (2015)
- Footfall increased by 13%
- Makers emporium – has incubated at least 12 new high street businesses[xiv]

Bromley – Improving visual experience

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

- public realm upgrade and shop front improvement programme,
- wayfinding and signage enhancements
- programme of business support
- town centre marketing and events programme.

There was investment of £6.5m in total: £2.0 million Mayor's Outer London Fund; £3.0m TfL; £1.5m Borough contribution and £50k private sector match.

Outcomes for the scheme were as follows:

- Improving footfall to and through the area – evidence suggests a strong increase in footfall in Bromley North Village since 2011.
- Diversifying town centre uses - The evidence points to success: there is a large and growing cluster of food and drink businesses.
- Improving the appearance and perceptions of the area – evaluation found that improvements have had 'transformational' impact on the quality of the environment.
- Inward investment and jobs: 92 full time equivalent jobs are supported within the 11 businesses that have opened in Bromley North Village over the 2 years since the scheme was completed.[xv]

Stockton-on-Tees
In response to declining footfall and high (and increasing) vacancies on the High Street, Stockton Council embarked on a multi-year and multi-million-pound programme involving the following elements:

- Major investment and improvement to public realm, incorporating better walking links and introduction of public art
- Refurbishment of the Georgian Theatre and construction of new ARC Arts Centre
- Creation of new business space for digital and creative companies and provision of subsidised incubator space
- Hosting of year-round specialist markets
- New housing developments around the town centre to increase the resident population
- Business support including 50% reduction in rates for 1st year and shop front improvement scheme
- Investment in an event support team, who have organised around 90 events, including the Stockton International Riverside Festival.

As a result of the programme:

- Stockton was the only town centre in the North East to see a positive net change of shops opening in 2017[xvi]
- The amount of Commercial Floorspace in the Borough is increasing significantly faster than nationally.
- Enterprise Arcade has hosted 59 businesses since 2011, of which 32 continue to trade independently.[xvii]
- Stockton won the Rising Star category in the Great British High Street Award 2016, in the words of the judges "The extraordinary transformation from its industrial past to visitor destination means it now pulls in crowds of up to 65,000".

Leeds – Night Time Economy for All
Leeds City Council has run its annual Light Night since 2005 – which is a festival of light projections, exhibitions, installations, film, dance, music, theatre and street performances across several venues in the city centre. The festival is a collection of independently organised events, arranged by charities, community groups and others, who can bid for a small grant to cover their costs.

The festival opens up the city centre to a diverse range of people, including children, who would usually not feel welcome in the evening. It attracts visitors from outside the region and raises Leeds' profile as a vibrant, cultural city.

Introduction to Town Centre profiles

This section contains profiles on each of the five main town centres in the borough, summarising the key research findings on each, including results from surveys of businesses and town centre users [4], followed by a vision statement and key themes for possible action based on analysis of the research. While the towns are presented individually, it is acknowledged that each town offers something different. The key themes suggested are to build a complementary offer across the towns rather than encouraging competition between them.

Bexleyheath

Geography

Bexleyheath is the primary town centre in Bexley and classified a Major Centre in the London Plan. The heart of the town centre is the pedestrianised Broadway Market Place, with its iconic clock tower. The Broadway Shopping Centre provides the retail core, while the majority of restaurants and bars are located on the western end of the Broadway. The eastern end of the Broadway also provides a culture and leisure cluster with a cinema, bingo and restaurants. The town provides the main bus transport hub for the Borough, with most routes passing through Bexleyheath. The key assets in Bexleyheath are shown on Figure 10.

The town has very different characteristics at different times of day. On weekday mornings and early afternoon, Bexleyheath has a mature clientele and young parents. While from 3-6pm, this declines with the influx of approximately 3500 secondary school students. In the evening, the bars and restaurants switch back to being used by families dining out and groups of adults socialising.

History

Bexleyheath's history harks back to Roman times – lying on the ancient Watling Street from Dover to London. Significant development of the town began in the latter half of the 19th century, with a large post-war housing boom. Bexleyheath is now a successful and bustling urban centre.

Demography

Table 1 Bexleyheath ward data

2019 population [xviii]	2018 median household income[xix]
16,305	£38,374

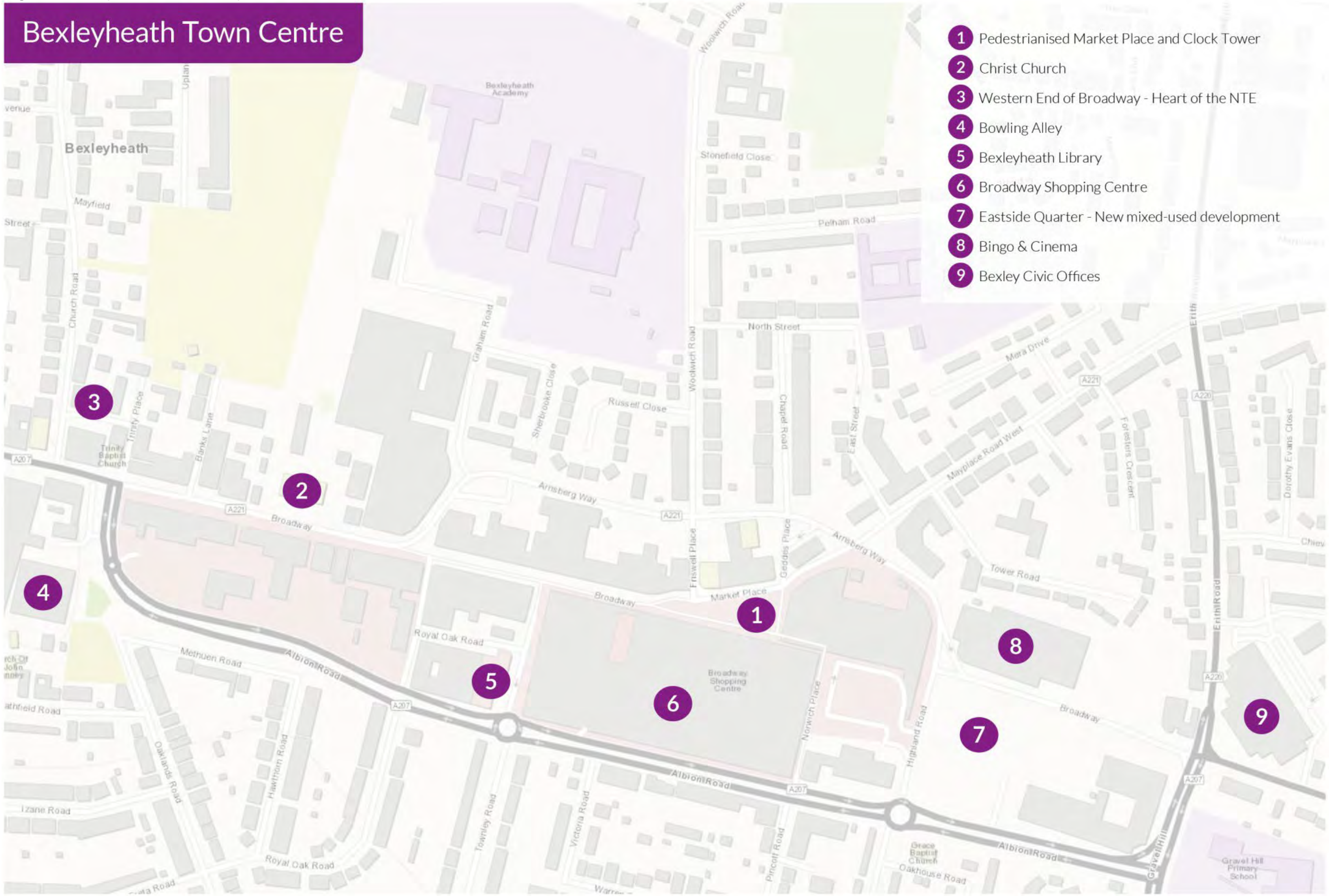
Population Aged 0-17	Population Aged 18-64	Population Aged 65+
3,369	9,651	3,284
21%	59%	20%

Although this is showing data for the ward containing Bexleyheath it should be noted that many of the shoppers and visitors to the town centre come from the north of the Borough.

Bexleyheath has a higher proportion of the resident population aged 65+ than other town centre wards. However, with some planned large-scale residential developments in the town centre either in construction stage or likely to come forward in future years, the town centre population is expected to shift significantly over time.

[4] Online and in person surveys of town centre businesses and town centre users took place between May and July 2018. Full details on the methodology and number of responses collected can be found in Appendix B - Methodology

Figure 10 Key assets in Bexleyheath



Perceptions of Bexleyheath

When surveyed, Bexleyheath town centre users were generally satisfied with the offer, wayfinding, parking, levels of noise and walking and cycling provision. However, town centre users were dissatisfied with its, attractiveness, sense of safety, sense of identity and the quality and attraction of markets and events.

Businesses in general had higher levels of satisfaction across all of these areas and had on average positive satisfaction for all categories except for parking and events.

Offering

Bexleyheath is the main retail and leisure destination in the Borough. With Bexley borough residents, it currently captures 17% of Convenience spend and 25% of Comparison spend. To illustrate the competition that Bexleyheath faces, Bluewater Shopping Centre captures 19% of Comparison goods spend by borough residents. Of the total spend by Bexley borough residents on clothing and footwear Bluewater captures 35% whereas Bexleyheath captures 38%. [xx].

Bexleyheath's offering is currently comprised of 41% National Multiple outlets (chains). One of the challenges Bexleyheath faces is the spatial distribution of its independents and multiples. The multiples are clustered in the Pedestrianised area of the Broadway, which means that a frequent comment about the pedestrianised area is that it could be 'Any Place'. This clustering also limits the benefit of footfall generated for smaller, dependent stores.
Bexleyheath's national multiple offering is on an upwards trend and is currently ranked 156th in the UK (out of a total of 3,500 centres) by the Javelin Value Score[5]

[5] The Javelin Value Score evaluates each shopping venue in terms of its provision of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

Photo 1 Bexleyheath Broadway

Accessibility

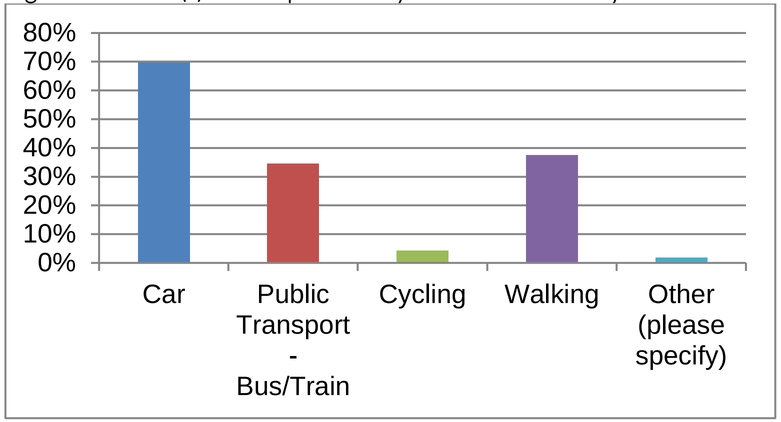
Car is the main mode of town centre access to Bexleyheath by 68% of users surveyed. This would be expected as Bexleyheath is well connected and easy to visit by car, with the A2 providing links to Greater London, the M25 and A220.

With high levels of car usage comes the need for parking. Bexleyheath has approximately 2,800 parking spaces distributed across 11 car parks, both public and private. Car users had 60% positive or neutral satisfaction levels with parking in Bexleyheath, while only 41% amongst businesses. Parking costs are lower than in competing town centres (e.g. Bromley), but Bluewater, which is Bexleyheath's main competitor, offers free parking.

Bexleyheath town centre has a Public Transport Accessibility Level that ranges from 3-6a (out of a possible range 0 to 6b) – due primarily to good bus connections at Market Place (near the Clock Tower). However, this area has limited capacity to accommodate the additional bus stops and stand space which will be required in the future. Away from this central area PTAL scores are generally lower. Public transport accessibility for the town is limited by the separation of the town centre from Bexleyheath and Barnehurst stations (both 15-20 min walk). There is good east-west connectivity; with the railway stations connected having frequent trains to London and north Kent. Improving signage and connectivity between the town and the rail station was a frequent verbal suggestion by respondents. North-south connectivity is dependent on bus connections.

Figure 11 sets out the modes of transport that survey respondents used to access Bexleyheath. Bexleyheath has higher than average levels of walking and average levels of cycling when compared to Bexley's other town centres. Many people come to the town centre using different modes, on different days (e.g. 44% of pedestrians/cyclists also come by car), so a target can be to increase the frequency in which people chose active transport. When asked what would encourage them to walk and cycle more –improved safety, visual attractiveness and bike parking topped the list.

Figure 11 Modes(s) of transport usually used to reach Bexleyheath[6]



Bexleyheath's Businesses

Bexleyheath town centre had 383 businesses with two or more employees and these provided employment to 8,283 people[7]. These values have grown by 12% and 8% respectively since 2013. The GVA of Bexleyheath's jobs is estimated at £550 million.

The key sectors of employment in Bexleyheath are:

- Government and administration –14%
- Comparison retail –11%
- Convenience retail –9%
- Electric power provision –6%
- Community services (e.g. police, fire, judiciary) –5%

[6] The figures in this table show percentage of people using each mode of transport to visit Bexleyheath – based on users responding to the survey. Because people use multiple modes of transport over a number of occasions, the total will add up to more than 100%.

[7]As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the town centre boundary based on the Unitary Development Plan (UDP). These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded in this analysis due to the high percentage of these being self-employed who are registered to an address, but to not physically work in the town centre. If they were included, for Bexleyheath the values are 536 and 8,422 respectively.

Since 2011, Bexleyheath has had a Business Improvement District (BID) that has worked to improve the business environment in the town centre. It represents around 200 town centre businesses and plays an active role in delivering events, business training and town centre beautification.

Bexleyheath's businesses were surveyed about their performance over the past three years. When comparing the performance against the previous three years from 2013, this was stronger for all categories except for footfall. This decline in footfall reported by businesses is supported by the footfall data. While there has been footfall decline in general across the UK; Bexleyheath's footfall in 2018 has been underperforming national and Greater London trends.

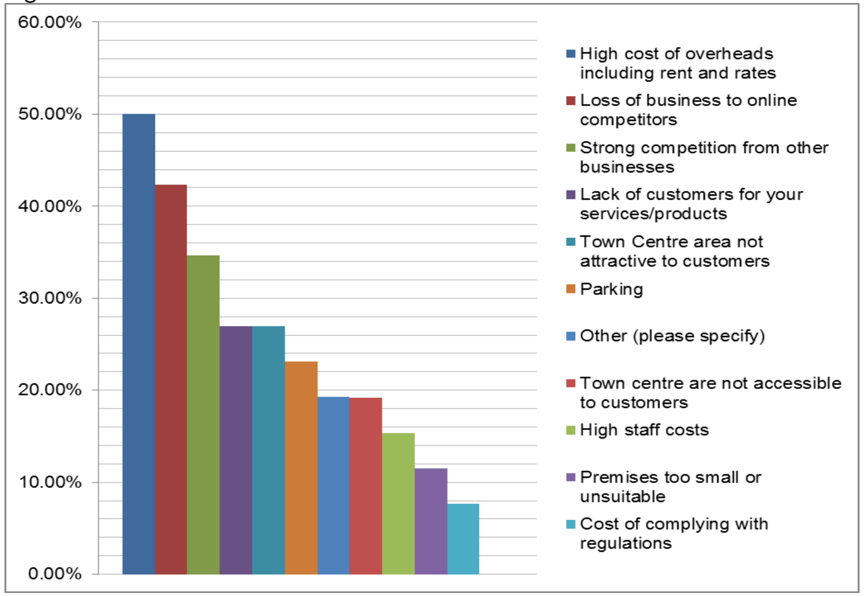
In 2018 Bexleyheath vacancy rates[8] were on a par with the national trend at 11%. However, its vacancy rate is higher than the Outer London Major Centres average of just over 6%.[xxi] The average masks a very wide variation within the town centre, with a very low core vacancy rate (below 2%) and a very high non-core (20%). Many of the independent businesses are located on the (non-core) western end of the Broadway – west of Asda - which suggests more needs to be done to support these and attract new businesses to this end.

52% of businesses responding to the survey were satisfied with Bexleyheath as a place to do business. While this is the second highest level in Bexley, it is a decrease from the reported 57% in 2013. Dissatisfaction levels have significantly dropped over the same period from 33% to 7%.

Business optimism levels are similar to what they were in 2013 for business turnover (61%); profit (52%), and footfall in the business (61%). Businesses were less optimistic about employment numbers, with only 31% of businesses forecasting growth in employment numbers – down from 52% in 2013.

Businesses in Bexleyheath were asked which factors they thought might be barriers to the growth or reasons for their decline – shown in Figure 12. The two greatest areas of concern were high costs of rent and rates (50%) and loss of business to online competitors (42%).

Figure 12 Identified Barriers to Growth



[8] Vacancy rates are based on an in-house biannual survey of ground floor commercial spaces within the town centre. For Bexleyheath this does not include the vacant former Civic Offices site as this is now a development site.

Analysis of Bexleyheath's strengths and weaknesses

What is great about Bexleyheath?

Based on feedback from businesses, consumers and local stakeholders these are the main strengths and opportunities for Bexleyheath:

- Good mix of retailers – especially national chains and brands
- Strong convenience offering
- A large pedestrianised area - space for events, market stalls and entertainment
- Business Improvement District (BID) works on behalf of businesses
- Low vacancy rates in town core and shopping centre
- Relatively strong leisure offer – including cinema, bowling, bingo, gyms, eating and drinking
- Great bus connections and plenty of parking spaces
- Increased residential development in town centres will bring more footfall and customers
- Retail mix attractive to younger shoppers
- Central Library - community resource and footfall generator
- Prominent location on high ridge – with expansive views over Kent countryside (which seeks an outward-looking opportunity).
- Changing Places facility in town centre – to enhance accessibility for disabled customers

What is not so good?

Users, stakeholders and businesses have identified the following issues and threats:

- Impact of numerous secondary school students visiting weekday afternoons
- Dominance of national retailers and lack of opportunity for independents in the core retail area
- Evening economy imbalance –concentration of F&B businesses in one part of town
- Lack of diversity in leisure offer
- Tired and unattractive public realm and some poor-quality shop frontages
- High non-core vacancy rates
- Threat of improved offer at Bluewater and other neighbouring centres
- Increased costs of running a retail business and competition from online shopping
- Perception of high parking costs
- Businesses report high levels of shoplifting and ASB

Vision and emerging priorities

Bexleyheath vision statement:
Bexleyheath will be a growing, accessible town that enhances and builds on its distinctiveness to provide residents and visitors with a positive experience in an attractive, vibrant, safe and friendly environment. It will have a reputation for providing a broad range of retail, leisure, experience and social opportunities – including through temporary pop-ups and regular events.

Town centre users, business and stakeholders were asked about their ideas and priorities for improvement. The three main priorities of town centre business and survey respondents were to improve the management of the afternoon influx of secondary school students; to review parking availability and charges and to increase the diversity of the food and leisure offering. This feedback combined with the wider evidence has led to the selection of the below key themes.

1. Place marketing and branding – Partly because of the dominating presence of national retailers in the Shopping Centre and pedestrianised part of the town, Bexleyheath has no strong identity, despite its many unique features, not least of which is its position on a high ridge with wide-ranging views over the Kent countryside. Additionally, Bexleyheath has relatively low brand recognition as a Major Centre within the wider London catchment. Thus, there is a need to promote that the town's unique selling points alongside all partners, and it is important that efforts to promote the town centre are properly coordinated to achieve maximum impact.

2. Place making / Public realm– Although over recent years there has been a significant programme of investment into the highways and public realm around the edges of Bexleyheath, the central area of the Broadway has not seen major improvements since pedestrianisation in the 1990s.

   The developing master plan for Bexleyheath, which aims to shape a long-term vision for the town, introducing new layouts - encompassing buildings, spaces, uses and connections - to ensure it can remain a relevant and successful town for the 21st century, should shape any future place making elements.

3. Western end of the Broadway – This area suffers from significantly higher vacancies than the rest of the town, yet is also where most independent businesses are clustered, is a focus for the town's evening and night time economy and home to a number of interesting heritage buildings. However, many facades are in a poor state of repair, forecourts are often blocked by parked cars and there is a lack of coherence about both the public realm and the offer.

4. Secondary school students – The need to respond to the impact of the large influx of secondary school students in the town centre was the single biggest issue raised by town centre businesses and users. Associated with this is a significant increase in the level of noise, overcrowding, littering and incidences of anti-social behaviour, which consequently drives away other town centre users and impacts on the revenue of most retail and food businesses within the core area.

   While it is a challenge, many of these school students are also current and future customers. Activities like Performing Places – a drama-led public youth event - in 2018 and 2019 have engaged with students to encourage better town centre relationships.

Connectivity and Accessibility – Town centres need to be accessible for all. A major asset to the town centre is the bus interchange – providing access to a wide area of SE London and Kent. The current location requires review to balance accessibility with the impact of the associated influx of afternoon school students.

More could be done to enable increased active transport for access to the town centre, and also to improve the linkage of the town to its two nearest train stations and other assets such as green spaces.

5. Modernising the leisure / socialising offer –Improved diversity and quality in the commercial-led leisure offer would increase the attractiveness of the town centre and would contribute to its success. There is a significant need to increase the offering to provide for families and younger users (including teenagers and young professionals).

   Locations for an improved leisure offering are being considered as part of the Bexleyheath master planning process.

6. Evening and Night time economy (NTE) – There is interest from businesses in exploring increased evening opening options to help capture trends towards later footfall. Although Bexleyheath's NTE is relatively strong in the borough (and London) context, there are identified deficiencies including that the offer is not diverse enough, too concentrated in one part of the town, aimed at only one segment of the NTE customer and suffers from poor safety perceptions.

Events and pop-ups – Events and pop-ups help attract visitors to the town centre and create a buzz for those that are there. Successful towns often have a year-round coordinated programme of high-quality events and markets to help drive footfall to the town centre and provide opportunities for a town's diverse community to meet and celebrate together. The town centre surveys indicated a demand for a regular market in Bexleyheath.

Crayford

Geography

Crayford is a Major District Centre [9] located in the north east of Bexley, adjoining the County of Kent and the town of Dartford. The major attractions are Tower Retail Park, Sainsbury's (the largest in the UK) and Cray Gardens. Crayford has a train station with connections to both London and Kent at the edge of its town centre. Key assets in Crayford are mapped in Figure 13.

History

Crayford is believed to have begun as an Iron Age settlement and was located along the ancient Watling Street. For much of its history it was a Kentish village but was industrialised in the 19th Century, firstly by the introduction of a silk mill and then the Vickers ammunition factory– now redeveloped. Crayford became part of London in the expansion and creation of Greater London in 1965.The town gets its name from an historical crossing of the River Cray, which runs through the town centre.

Demography

Table 2 Crayford ward data

2019 population [xxii]	2018 median household income[xxiii]
16,619	£31,937

Population Aged 0-17	Population Aged 18-64	Population Aged 65+
4,125	10,019	2,476
25%	60%	15%

[9] To be renamed a District Centre in the draft Local Plan

[10] Crayford residents are a sub-set of town centre users

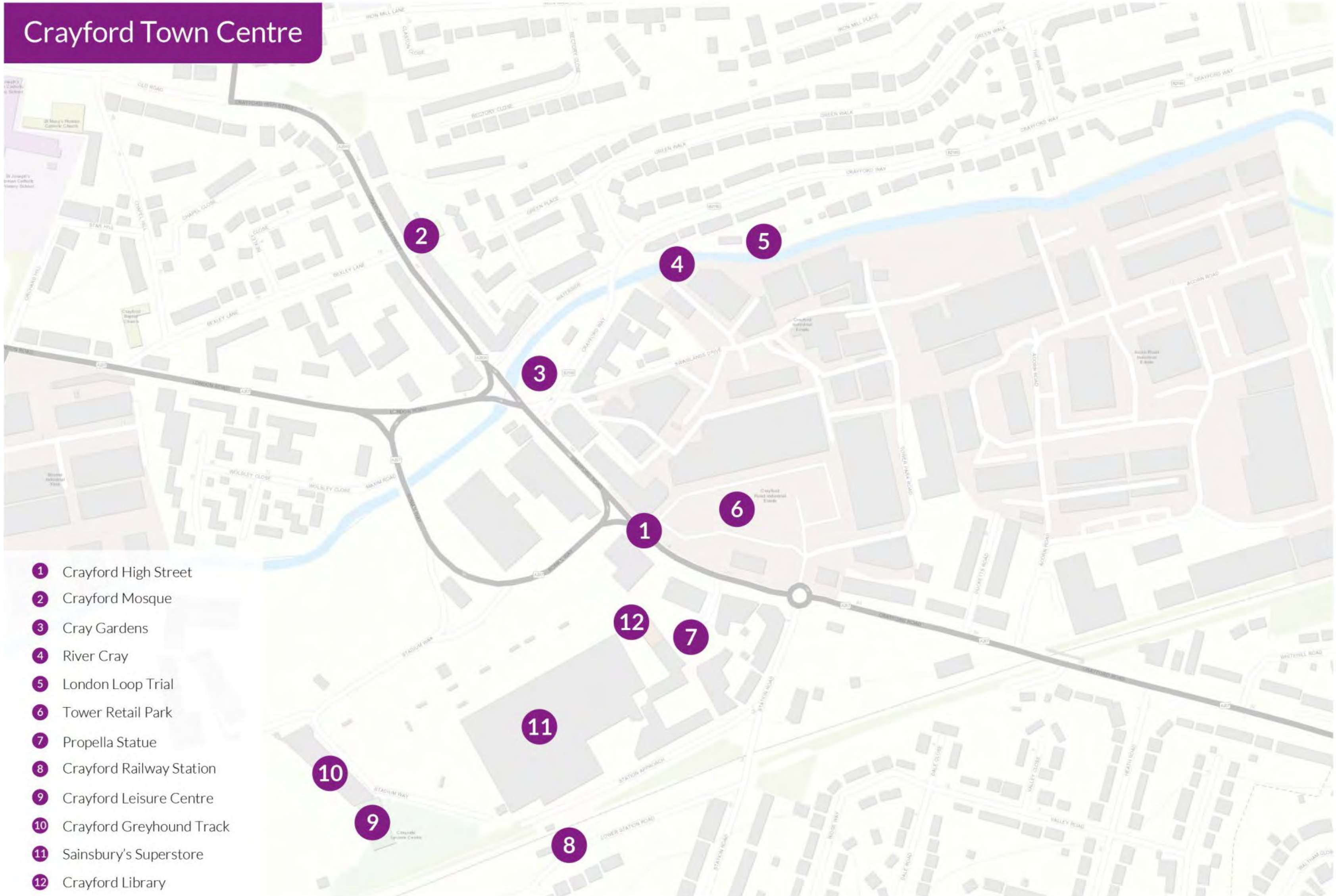
Perceptions of Crayford

Crayford had very different perceptions by town centre visitors and town centre residents. Town centre visitors had much lower levels of satisfaction, with only signage and parking having positive levels of satisfaction, while Crayford residents [10] had neutral or positive levels of satisfaction for everything except for quantity and attractiveness of events, which scored extremely low across the board.

Businesses had good levels of satisfaction for all categories except for adequacy of parking and the quality of events. There were high levels of satisfaction for four of the categories: sense of safety, public realm, signage and sense of identity.

The issue of traffic noise and congestion, especially from the three-lane A207, dominated the impressions of both the businesses and town centre users surveyed about Crayford.

Figure 13 Key assets in Crayford



Offering

Crayford acts primarily as a retail destination, with a limited leisure offer, for residents in the East of the Borough, primarily in Crayford and Slade Green. With Borough residents, it currently captures 12% of Convenience spend and 4% of Comparison spend[xxiv]. Town centre users had positive satisfaction levels with the comparison, convenience and restaurant/café/take away offering in Crayford. Satisfaction with personal services has dropped to negative levels since a similar survey in 2013, largely attributed to the closing of Crayford's only bank.

Both cultural and leisure activities and evening leisure actives scored poorly, with less than 10% of respondents expressing any form of positive satisfaction with these aspects. The majority of respondents considered that the offer is not extensive enough or of sufficient quality.

Accessibility

A car is used by 77% of respondents as one of their main modes of transport to access the town. While the primary parking provision is private, both residents and businesses had generally positive satisfaction with it. Together with Erith, Crayford has the highest car usage of all of Bexley's town centres and the lowest levels of access by cycling and walking.

To increase pedestrian and cycling usage – 28% of residents wanted the safety of routes to be increased, as well as improving the bike parking. The potential introduction of a strategic cycling route along the route of the River Cray and through the town will assist with this, as would improving the attractiveness of all routes.

Crayford has a PTAL rating that ranges between 1b near the Greyhound Track to 3 at the railway station. The train station is an 8-minute walk from the town centre and has direct connections to London Cannon Street and Kent and there are three bus routes that start or pass through the town centre.

Photo 2 Propella Statue

Crayford's businesses

Within Crayford's town centre there were 256 businesses with two or more employees (as at October 2018) and these provided employment to 3,884 people[11]. Since 2013 the number of businesses has increased by 10%, but this has only translated into a 3% growth in employment.

The key sectors of employment in Crayford's town centre are:

- Convenience retail –19%
- Freight rail transport –6%
- Comparison retail - 6%
- Restaurants and mobile food service –6%
- Electrical, plumbing and other construction activities –5%

The GVA of Crayford's town centre jobs is estimated at £258 million.

Crayford town centre is made up of a high proportion (78%) of independent businesses and 22% national multiples. The spatial distribution of these businesses is not equal across the town centre, with the multiples clustered on the south-eastern end of town near Sainsbury's and Tower Retail Park, while the independents are predominantly along the traditional high street.

Similarly, to the other District centres, there has been very limited historical footfall monitoring in Crayford – which has been restricted to 1-2 manual count surveys per year. Based on this limited information, average weekly footfall along the high street has apparently taken a downwards trend since 2012.

The centre vacancy rate currently sits at 8%. Unlike the other Town Centres in Bexley, the core vacancy rate (13%) is higher than the non-core rate (6%), which shows that the focus of the town has shifted away from the traditional town centre towards Tower Retail and Sainsbury's. This change is expected to be reflected in the redrawn town centre boundaries contained in the draft Bexley Local Plan.

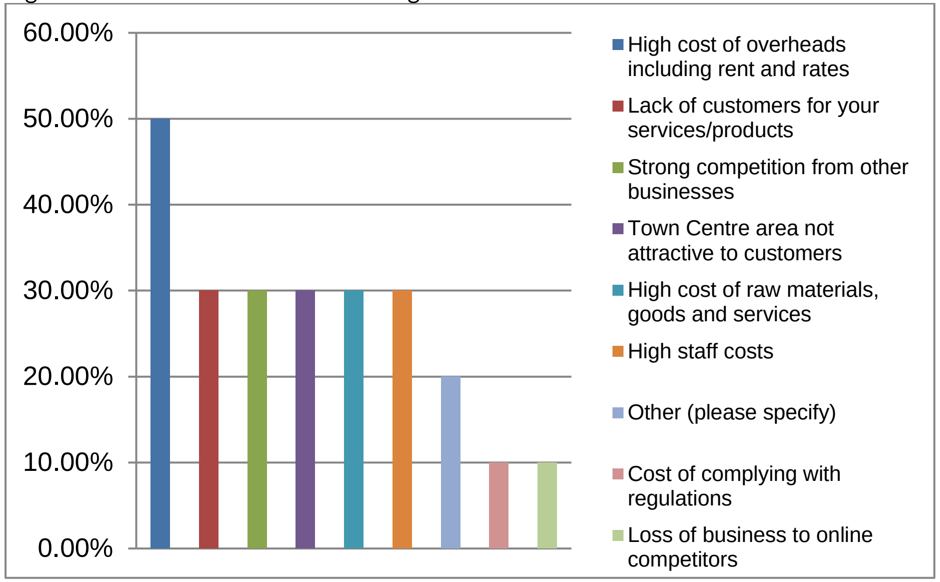
The composition of Crayford differs from national trends. Currently 37% of the commercial floor space is for convenience retail. This is significantly higher than the UK average (15%) – but is explained primarily by the presence of the very large Sainsbury's store. As would be expected from user perceptions, leisure service provision is below the UK average (25%) at 17%. Crayford is also well below the UK average (8%) for Financial and Business Services at below 2%.[xxv]

The response rate of Crayford's businesses was not sufficient to draw conclusive evidence about business performance and optimism – however the responses received did point to positive changes in turnover, profit and footfall over the previous three years – along with reasonable levels of confidence about the future amongst those completing the survey.

When surveyed about barriers to growth the high cost of overheads (rents and rates) was the top response, but other key barriers included a lack of customers generally, strong competition and that the area is not attractive to customers. These responses are set out in Figure 14.
Figure 14 Which factors are barriers to growth or reasons for business decline?

[11] As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the official town centre boundary. These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded in this analysis due to the high percentage of these being self-employed who are registered to an address, but to not physically work in the town centre. If they were included, the values are 330 and 3,951 respectively.

Figure 14 Which factors are barriers to growth or reasons for business decline?



Analysis of Crayford's strengths and weaknesses

What is great about Crayford?

Based on feedback from businesses, consumers and local stakeholders these are the main strengths and opportunities for Crayford:

- Cray Gardens and the Café in park (Lindy Lou's)
- Cray River Walk/London Loop Trail
- Tower Retail Park and Sainsbury's
- Good pub scene, especially the Bear and Ragged Staff (Music pub)
- Active Rotary Club
- Library with community space
- Good car access and parking (private)
- Propella (statue in Crayford)
- Active leisure offering - Europa Gym and Greyhound track
- Some good Restaurants
- Crayford is identified as a Growth area in the Bexley Growth Strategy
- Development sites behind Tower Retail

What is not so good?

Users, stakeholders and businesses have identified the following issues and threats:

- Traffic – high volumes in town centre, especially whenever there are any road works, and pedestrianised crossings are slow
- Lack of promotion of local businesses
- Town divided into three distinct areas – with poor connections between them
- Poor public realm in places – weeds, litter
- Poor legibility/wayfinding (esp. for library and station)
- Very limited range of independent retail
- High levels of unhealthy businesses (e.g. takeaways, betting shops etc.)
- Lack of greenery on the High Street
- Very poor cycling infrastructure and lack of bike parking
- Poor station accessibility
- Potentially large national units under threat – due to national trends
- Businesses report high levels of shoplifting and ASB
- Lack of activities for children
- Lack of financial services (no Banks)

Vision and emerging priorities

Crayford vision statement:
Crayford will be a connected and attractive town centre with an offering that meets the needs of both existing and future residents. The town centre will be reclaimed from severe traffic and accessible by all. The natural assets will be enhanced and local businesses will be supported.

Town centre users, business and stakeholders were asked about their ideas and priorities for improvement. Traffic was the priority area for half of the respondents, while nearly 20% each wanted improved shops and restaurants and improved public realm. This feedback combined with the wider evidence has led to the selection of the below key themes and suggested actions.

The key themes for action arising from this vision are set out below:

1) Improve traffic management – Reducing noise, congestion and pollution from traffic was the priority improvement area identified by half of surveyed Crayford town centre businesses and residents. The three-lane A207 dominates the town centre and creates significant congestion, especially when there is on-going works. There is an on-going Transport for London (TfL) funded study that is exploring potential traffic management options for the town centre.
2) Increase accessibility – Associated with the high traffic flows are low pedestrian and cycle access and usability of the town centre and segregates the town into three zones - Sainsburys, the Tower Retail Park and traditional high street area - In addition, the railway station has limited access for disabled users, with the Dartford-bound platform not accessible from the main station entrance.
3) Enhance the public realm – Crayford suffers from periodic road flooding, outside of the Cray gardens has very limited town centre greenery. Some areas of public realm look tired and in need of refurbishment.
4) Enhance the leisure offering – Crayford had very low levels of satisfaction associated with both its daytime and evening leisure offering and these have worsened since 2013. Users had good levels of satisfaction with the restaurant and café offering, but very low across the other culture and leisure elements. Improving the balance between healthy and unhealthy businesses is an important part of enhancing the leisure offering. One aspect that may have an impact on the evening leisure offering is the perception of safety – which from our surveys has declined somewhat since 2013.
5) Support business growth – Crayford has three distinct areas – Tower Retail, Sainsbury's and the predominantly independent businesses on the High Street. It is important that independent businesses are supported to help diversify the retail offering. There is currently no business association that bring the groups of businesses together.

Erith

Geography

Erith town centre is in the north-east of Bexley borough – with frontage directly on the River Thames opposite Rainham Marshes. Belvedere lies to the west of the Town Centre whilst Slade Green is to the east. The main draws for residents and visitors are Morrison's, the Riverside Shopping Centre and the Energie Fitness gym.
Erith' s assets, including the old Carnegie Library, Erith Pier (the longest in London) and the riverside gardens are mapped in Figure 15.

History

Erith has strong heritage connections to the River Thames – operating historically as a small port and industrial location, and in the 19th century also as a leisure and recreational destination, with a large 'pleasure garden' built alongside the river. In the 1960s, the town was extensively redeveloped following Modernist town planning ideas, including pedestrian/traffic separation, multilevel commercial environments and residential tower blocks. This dramatically altered the layout of the town, and many crucial routes and public spaces were radically altered. The town also saw the construction of flood defences, vital in protecting the area from flooding, but which sever much of the town from a connection to the river.

Demography

Erith ward has the highest proportion of residents aged 0-17 amongst the town centre wards. It also has the lowest median household income. The town centre is one of the borough's major growth locations, based on the Bexley Growth Strategy, and is expected to see up to 6000 new homes in or within short distance of the town centre during the next 30 years. Therefore, the population is expected to expand and change significantly.

Table 3 Erith Ward Data[12]

2019 population [xxvi]	2018 median household income[xxvii]
12,801	£26,812

Population Aged 0-17	Population Aged 18-64	Population Aged 65+
3,579	7,723	1,499
28%	60%	12%

Perceptions of Erith

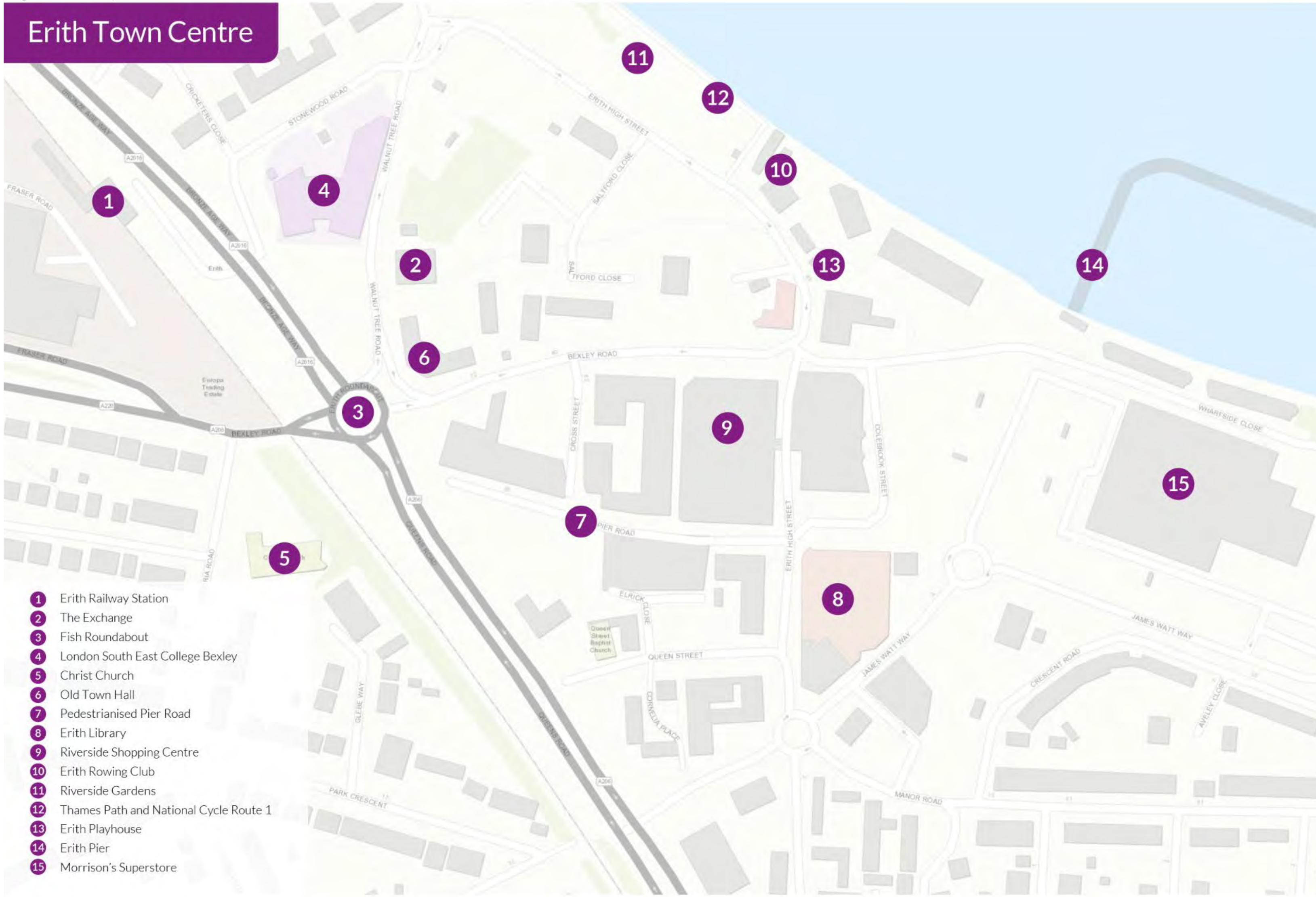
Businesses and town centre users were asked about their perceptions across a range of factors. Business respondents were significantly more satisfied about the town centre than town centre users responding to the survey.

Businesses scored the walking and cycling provision and signage very highly, whilst the only categories where businesses show dissatisfaction were with the quantity of events and attractiveness of the town centre. Contrastingly, users were moderately satisfied with only two elements – the parking provision and the level of noise. The comprehensiveness of the offer and the quantity of events received very low scores - although the town has seen more frequent special events (e.g. Erith Pier Festival) in recent years, thanks to the Council's Greater Erith regeneration programme.

Five of the aspects asked about in the survey were designed to match those asked as part of a 2013 survey. The comparison between this and the 2018 survey shows a marked decrease in satisfaction between 2013 and 2018 across all aspects, except attractiveness of place, which remained at the same low level.

[12] Sum of age range sub-totals do not equal total population due to rounding.

Figure 15 Key assets in Erith



Offering

The most popular reason for visiting Erith is for convenience shopping – e.g. groceries, and household goods – notably thanks to Morrisons and a large Wilkinson's in the Riverside Shopping Centre.

When asked about their level of satisfaction with the town centre offering, town centre users generally scored it low. Satisfaction with the offering has decreased across all categories since 2013, with the evening leisure offering showing the largest decline. This can be attributed to the very limited number of evening venues. The opening of the Exchange is expected to help this aspect, but there is scope for significant improvement to the overall culture and leisure offering in Erith – especially in the evenings. However, users have concerns about safety especially in the evening and night times. This could be a potential barrier to the further development of the culture and leisure offer.

Erith has a soft play centre and leisure centre (located just outside of the town centre), but there is a limited offering for families and school children that is an identified gap.

Accessibility

The car is used by 77% of respondents as one of their main modes of transport to access the town. While the primary parking provision is private, both residents and businesses were generally positive about it. Based on the user survey, Erith has the highest level of car usage of all of our town centres and the lowest level of cycling to reach the town centre, which fits with a pattern of very low levels of active transport by non-residents.

Erith has an average Public Transport Accessibility Level (PTAL) score of 3. The train station is a 7-minute walk from the town centre – on the opposite side of the A2106 – but has direct connections to London Cannon Street and Kent. There are 7 bus routes that start or pass through the town centre. The rail station suffers from lack of step free access on the London-bound side, which should be a priority in any planned future upgrades to facilities.

The Bronze Age Way (A2016/A206) divides Erith in half and reduces permeability into the town centre, especially for pedestrians. To increase pedestrian and cycling usage – 50% of town centre users surveyed wanted the safety and attractiveness of routes to be improved. It is expected that the on-going Erith Links project will bring improvements to this aspect of the town – and improve linkages with the station.

Erith's businesses

Within Erith town centre there were 142 businesses with two or more employees (as at October 2018) and these provided employment to 2,921 people[13]. These values have grown by 3% and 8% respectively since 2013.

The key sectors of employment in Erith town centre are:

- Comparison retail –13%
- Convenience retails –11%
- Freight transport by road and removal services –11%
- Demolition and site preparation services- 9%
- Business support service activities n.e.c. - 6%

The GVA of Erith's jobs is estimated at £196 million.

[13] As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the official town centre boundary. These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded in this analysis. If they were included, the values are 221 and 2,997 respectively.

Erith is made up of 62% independent retailer and 38% national multiples. Most of the national multiples are housed within the Riverside Shopping Centre and most occupiers outside the Centre are independents. Erith's Javelin (National multiple offering) rating has declined from 1,118th in 2014 to 1,276th in 2017[14].

Currently 36% of the commercial floor space is for convenience retail. This is significantly higher than the UK average (15%). As would be expected from user perceptions, leisure service provision is well below the UK average (25%) at 16%. Erith is also below the UK average for Financial and Business Services at 4% (UK Average 8%). Between 2011 and 2018 floor space for this sector has decreased by 29%.[xxviii] Loss of business space in the town centre will inevitably reduce potential footfall and spend – especially for the lunchtime and evening trade.

Erith's town centre businesses were surveyed about their performance over the past three years. When comparing the performance against the previous three years from 2013, this was stronger for all categories. Business turnover, profit and employment in the business are relatively strong.

Erith vacancy rates were 7% in spring 2018 – made up of a 4% core rate and 10% non-core rate. Over the past two years, Erith has seen a reduction in vacancy rates, primarily due to the reduction in non-core vacancies.

The decrease in vacancy rates is correlated with an increase in footfall. Riverside Shopping Centre, the primary place footfall is measured in Erith, has recorded a dramatic increase in footfall and as of August 2018, which was up 25% year-on-year.

Business optimism in Erith has improved and had an average of 66% of business expecting positive results across all four categories. There is 80+% confidence for profit and turnover, while employment numbers are expected to remain constant.

Businesses in Erith were asked which factors they thought might be barriers to the growth or reasons for their decline. The high costs of rent and rates were the most commonly cited, but overall there was a wide range of responses. When focusing in on the comparison retail offering, the businesses were predominantly worried about the high cost of raw materials.

Photo 3 Erith Riverside

[14] Javelin ranks the top 3,500 retail centres in the UK

Analysis of Erith's strengths and weaknesses

What is great about Erith? Based on feedback from businesses, consumers and local stakeholders these are the main strengths and opportunities for Erith:

- The River Thames, Riverside Gardens, Erith Marshes, plus walking and cycling routes
- Riverside Shopping Centre – low vacancies and proactive management
- Morrison's - as an employer and a footfall magnet
- Leisure offer – including Kassiopi Cove, Leisure Centre, Library, gyms, Erith Playhouse and Erith Town FC
- LSEC college campus
- Heritage assets – especially Erith Pier
- Community groups and services – and strong community will to improve Erith
- Diverse residents – many of whom live within walking distance
- New developments and potential new town centre customers
- Rowing and Yacht Clubs could help provide more links to Thames
- Good quality public realm and public art in places
- The opening of refurbished Carnegie by the Exchange
- Ongoing Greater Erith regeneration programme – bringing events such as the Erith Kitchen and potential for future investment.
- Plenty of future development opportunities – Opportunity Area
- Future Crossrail connectivity – including potential C2E extension

What is not so good? Users, stakeholders and businesses have identified the following issues and threats:

- Traffic congestion, noise and air pollution and segregation caused by roads
- Visual amenity poor in places – e.g. overgrown planting and public realm
- Wayfinding and legibility of public spaces – poor connectivity with station, the river and wider residential area
- High obesity and diabetes rates in residential population
- Limited choice of food and beverage – and lots of fast food
- Lack of things to do – especially evenings and night time
- Anti-social behaviour, street drinking and perceptions of high crime
- Limited business / commercial space in the centre
- No business organisation or BID
- Lack of a sense of arrival or a central focus

Vision and emerging priorities

Erith vision statement:
In the next 5 years, the Council will work with the community to enhance Erith as a vibrant, safe, attractive and fun destination for all to live, work and socialise - enjoying a diverse offer, both day and night, capitalising on the town's unique heritage and riverside setting.

Town centre users, business and stakeholders were asked about their ideas and priorities for improvement. Improving the retail offering topped the list (30%), followed by public realm improvements (28%), enhancing the connection with the riverside and regeneration (both 20%); and improving the culture and leisure offering (including restaurant and cafés). This feedback combined with the wider evidence has led to the selection of the below key themes and suggested actions.

The key themes for action arising from this vision are set out below:

1) Place marketing – Erith currently has limited place recognition and many people are unaware of its many strengths, including its interesting heritage and riverside assets. The Council, using its Greater Erith brand has been working to change this – and this brand is becoming associated with positive regeneration projects such as the Carnegie Building refurbishment and community events such as the Pier Festival. There are also a number of businesses and organisations operating locally which have an interest in marketing Erith to residents and visitors.

   The first view that many people have of Erith is from the A206 (Fish) Roundabout, which is not perceived by stakeholders to create a welcoming and attractive feel.

2) Connectivity and wayfinding – Traffic, accessibility and air quality are all areas town centre users expressed significant concerns over. Perceptions around wayfinding and signage have deteriorated since 2013. The Erith Links project has started to improve connectivity in Erith and will review the road network and improve linkages between the station and the town centre.

3) Leisure and evening economy – Whilst there are a number of takeaway outlets, a pub and a couple of restaurants, there is a distinct lack of diversity in the evening economy and the leisure offer more generally. In the town centre user survey Erith did not have any positive scores for the evening economy offer. Footfall data shows that there are very few visits to the town centre after the shopping centre closes at 5.30 (weekdays and Saturday). Erith also has a limited daytime leisure offering, especially for families and school.

4) Events and markets – A regular programme of special events can be used to attract a diverse audience. Events can provide test trading environment for new businesses, and as trailblazers for new concepts, such as the Erith Lighthouse and Erith Kitchen events, which have demonstrated that there is a demand for evening food options in Erith.

   The first Erith Pier Festival was held in September 2018 and it is believed that this, and other events, could be developed in future to have a London-wide draw. Survey responses indicate that people miss the former Erith Market and moves to explore the introduction of a 21st century version would be welcomed.

5) Public realm – Erith scored the lowest of all of Bexley's town centres with only 16% of respondents agreeing that it is an attractive place to spend time and only 20% thinking it had good quality public realm. The quality of the public realm needs to be improved and stakeholders want a greener town centre that has visibly improved connections to the river. The on-going

Erith Links and Good Growth Fund programmes will start to improve and green the public realm.

6) Supporting businesses – There is a town centre forum that represents the views of businesses, residents and community organisations. However, participation by businesses in the forum is limited and the existing business community is small and relatively fragmented. There is also a limited offer in terms of work space.

Sidcup

Geography

Sidcup town centre is a Major District Centre[15], providing the primary shopping and services destination for residents in the south of the Borough with a mix of independent retailers and chain stores. Sidcup is the creative heart of the Borough, home to two international performing arts colleges - Rose Bruford and Bird College – and also has a number of heritage buildings and attractive parks and greenspaces. Key assets in Sidcup are mapped on Figure 16.

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 has developed into a thriving hub – with many of the shops and food and drink businesses serving commuters and students from the nearby colleges. For the purposes of this Strategy references to Sidcup include both the town centre focussed around Sidcup High Street and the Sidcup Station Parade.

The railway station is located a 12-minute walk from the High Street – providing trains to Charing Cross and London Bridge - and the town is also served by a collection of buses with connections to South east London and Kent.

History

While its recorded history dates back to 1254, its significant development came after the introduction of the railway station in 1866, which led to a 20-fold increase in population over the next 40 years.[xxix] During WWI, Sidcup's Frognal House served as an important hospital caring for injured servicemen, which developed into Queen Mary's Hospital – now managed by Oxleas NHS Trust.

[15] Sidcup town centre is to be renamed a District Centre in the draft Local Plan

Demography

Table 4 Sidcup Ward Data

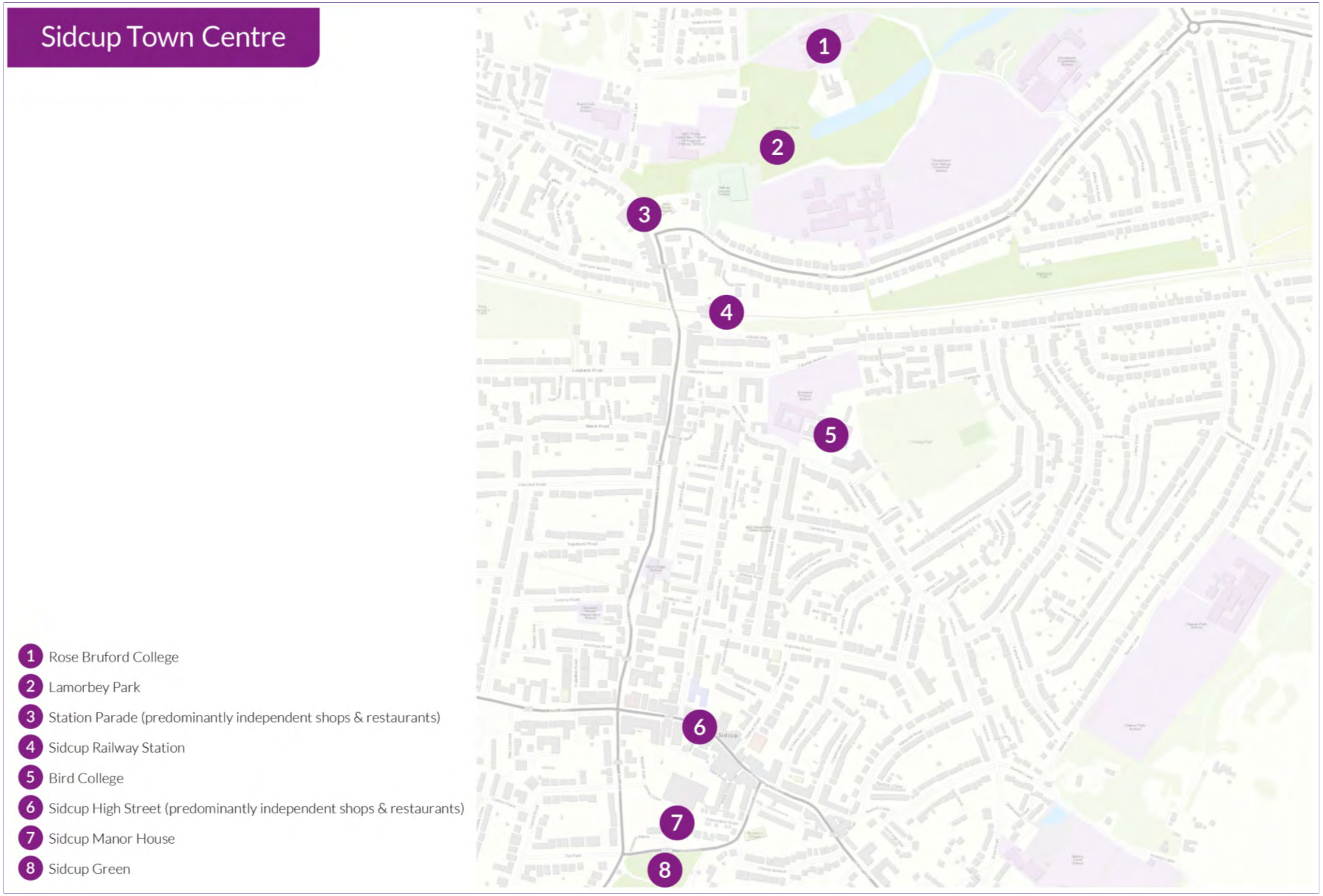
2019 population[xxx]	2018 median household income[xxxi]
16,920	£33,263

Population Aged 0-17	Population Aged 18-64	Population Aged 65+
3,810	10,171	2,939
23%	60%	17%

Sidcup has recently become a key destination for young first-time buyers, with 24% of properties sold to first time buyers in their 20's and, perhaps as a consequence, the proportion of the population aged 25-34 is higher than the borough average.[xxxii]

Photo 4 Sidcup High Street

Figure 16 Key assets in Sidcup



Perceptions of Sidcup

When surveyed, Sidcup town centre users were overall satisfied with the sense of safety, level of noise, quality of wayfinding, the public realm and attractiveness of the town centre – although none of these aspects scored very highly. Town centre users do not feel that the town provides a comprehensive offer of shops and services, adequate parking or sufficient markets and events.

Businesses had higher levels of satisfaction across all of these areas and had on average positive satisfaction for all categories, scoring the sense of safety, quality of public realm, wayfinding and sense of identity particularly highly. Businesses were lower scoring on parking and events.

Offering

Sidcup is the main retail destination for residents in the south of Borough. With Borough residents, it currently captures nearly 8% of Convenience spend and 3% of Comparison spend[xxxiii]. Given its position near the southern edge of the borough, Sidcup also captures some visitors and spend from outside Bexley – from areas such as Chislehurst and Bromley, but conversely these centres also draw local residents away (as does Bluewater – which is easily accessible via the nearby A20).

When asked about their level of satisfaction with the town centre offering, town centre users were very positive about the restaurants and personal services offering but negative about the offering of cultural and recreation facilities (despite the presence of a library and a gym) and with comparison retail. Satisfaction has stayed at similar levels between 2013 and 2018 but shows an increase in the average score for the evening leisure offer.

Sidcup's offering is currently comprised of 38% National Multiple outlet and 62% Independents. Its national multiple offering is currently ranked 819th in the UK by the Javelin Value Score. This has increased from 879th in 2014. With its location between three main retail locations Bromley (38th), Bexleyheath (145th) and Bluewater (27th), and serving mainly local needs, it is unlikely that Sidcup would ever come close in terms of its national chain offer but can provide a unique offering and experience that can draw in shoppers and visitors. Independent businesses therefore play an important role in Sidcup's competitiveness.

Accessibility

Car is used by 60% of respondents as one of their main modes of transport to reach the town centre. This would be expected as Sidcup is well connected and easy to visit by car, with the nearby A20 providing links to Greater London and the M25. There were low levels of satisfaction with parking in Sidcup, despite the 1,077 car parking spaces distributed across 6 car parks in Sidcup, both public and private.

Sidcup High Street has a PTAL that ranges between 2-5 due primarily to good bus connections. There are 10 bus routes that start or pass through the town centre. However, rail accessibility from the High Street itself is relatively poor, with Sidcup Station a 12 min walk away.

As many respondents come to the town centre using different modes on different days (e.g. 45% of pedestrians/cyclists also come by car) increasing access by active modes of transport can be achieved by encouraging the current pedestrians/cyclists to use these modes more as well as trying to convert car drivers to these modes. When asked what would encourage them to walk and cycle more – all groups responded that improved safety and visual attractiveness of routes would help.

Sidcup's businesses

Within Sidcup town centre[16] there were 319 businesses with two or more employees (as at October 2018) and these provided employment to 4,431people[17]. These values have grown by 14% and 12% respectively since 2013, with the majority of the growth in Station Road area.[18]

The key sectors of employment in Sidcup town centre are:

- Community services (e.g. police, fire, judiciary) - 17%
- Convenience retail –8%
- Residential nursing care activities – 8%
- Business support activities n.e.c. – 6%
- Restaurants and mobile food service – 5%

The GVA of Sidcup's jobs is estimated at £360 million.

Sidcup's businesses were surveyed about their performance and their perceptions of the town as a place to do business in autumn 2017 by the Sidcup Partners BID and again by the Council in summer 2018. The Sidcup Partners survey had a significantly higher response rate. Both surveys suggest that businesses are positive about Sidcup as a trading location, and satisfaction scores have improved on the last time a business survey was done (2013).

When asked about how they are trading now in comparison to last year 29% reported positive improvement – with 26% neutral. In both surveys businesses were asked how optimistic they were about the future, with significant variation in the results. In the 2018 survey, businesses were 90% positive about improved performance over the next three years, while in the 2017, only 31% were positive, while 47% were neutral. This variation may partly be down to the difference in sample size. In terms of customers served, 43% were serving similar numbers to the previous year, 23% experienced an increase and 26% experienced a decrease.

Sidcup vacancy rates are currently below the national average –at 8%. Over the past two years, there has been a small increase from 6% in 2016.

As with all the towns in this study, apart from Bexleyheath, there is limited historical footfall monitoring in Sidcup – based on 1 or 2 manual counting surveys per year. The last count of weekly average footfall (in September 2018) was down 3.7% on the previous September and 8.7% down on September 2016 – so overall there appears to be a declining footfall trend

[16] As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the official town centre boundary. In Sidcup, the businesses located on the Station Road Parade have also been included.

[17] These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded as have the numbers of large shell employment (cleaning) companies. If they were included, the values are 476 and 5519 respectively.

[18] The growth percentages also exclude the Metropolitan Police employment, as there was an error in the 2013 data for this entity that was significantly distorting the figures.

Analysis of Sidcup's strengths and weaknesses

What's great about Sidcup?

Based on feedback from businesses, consumers and local stakeholders these are the main strengths and opportunities for Sidcup:

- Performing arts colleges Rose Bruford and Bird – a pool of cultural talent
- Heritage buildings and landscapes (e.g. Sidcup Manor House, Sidcup Green)
- Attractive and safe high street with pleasant public realm and shop fronts
- Good food and drink offering
- A number of good independent businesses, plus strong national brands
- BID working on behalf of businesses and local community
- Affluent demographic with town centre loyalty
- Relatively affordable place to live with good connectivity
- Vibrant community infrastructure – library, churches, clubs and community venues
- Possible re-development of Lamorbey Baths site and Sidcup Manor House (Hotel / spa)
- Potential new library / cinema development
- Incoming 20-30s demographic and student population
- Potential links with colleges to develop as cultural hub

What's not so good?

Users, stakeholders and businesses have identified the following issues and threats:

- Limited offer to attract students, young professionals and young families
- Sleepy and quiet feel may put off younger demographic
- Limited range of specialist retail
- High St vulnerable to bank closures and national chain contractions
- Lack of event space, or central focal point – reduced opportunity for events / markets
- Fragmented town centre – split between High Street and Station Parade
- Some ASB – especially near certain fast food outlets
- Traffic and congestion
- Low digital and social media engagement
- London Plan proposed housing density could change character
- Loss of office space to permitted development conversions – reducing daytime footfall levels

Vision and emerging priorities

Sidcup vision statement:
Sidcup will continue to draw on its cultural, educational and heritage assets as aa place that is known for being creative, lively, and attractive. The town will be a hub for the incubation of new businesses and supportive of independent entrepreneurs, and known as a place where innovation and creativity are accommodated and supported.

Town centre users, business and stakeholders were asked about their ideas and priorities for improvement. Improving the retail offering and improving the traffic and parking jointly topped the list (31%). These were followed by increasing the leisure offering (17%), public realm improvement (14%) and improving the quality and diversity of restaurants, cafes and bars (10%). This feedback, combined with the wider evidence, has led to the selection of the below key themes and suggested actions.

The key themes for action arising from this vision are set out below:

1) Retail and leisure offer – The research suggests that there is a gap in the market around the offering for students, families and young professionals. There are changing demographics in Sidcup which means that there is a need for a more diverse offer which would appeal to a younger shopper. The proposed creation of a new cinema and library complex will help diversify the leisure offering.
2) Independent businesses – Independent businesses are the backbone of Sidcup's community – often providing niche services, personal attention and a sense of local identity. It is increasingly challenging them for them to thrive in today's extremely competitive market. These businesses would benefit from the location of more office workspace (including co-working space) in the town centre to help boost lunchtime and evening footfall.
3) Events and community engagement – Sidcup would benefit from an increased frequency and quality of events taking place in the town centre. One element of this would be to enable a programme of events aimed at celebrating the cultural and heritage assets of the town. The Sidcup Fringe and BID activities have started this, but there is scope for their enhancement with a view to putting Sidcup on the map as a cultural destination. A limiting factor in Sidcup is the lack of a central event space within the town centre.
4) Place marketing - Sidcup has several unique selling points – including the arts colleges, beautiful green spaces, an attractive high street and a rich heritage that could appeal to both town centre uses and prospective businesses (inward investment).
5) Public realm / shop fronts – Although Sidcup has benefitted from relatively recent investment in the public realm, and users of the town do rate it as attractive, there are identified areas for improvement. Sidcup's public spaces could benefit from more activation of the spaces – for example through music, street art and heritage trails. The space fronting the shops could also benefit from enlivening. Sidcup residents are proud of the green spaces near the town, but would like this greenery to further expanded into the town centre.
6) Evening and Night Time Economy- Sidcup's evening and night time economy have relatively low levels of satisfaction amongst town centres users although this is slowly improving. It is felt there is insufficient diversity of offer to appeal to families and young professionals, and relatively limited choice beyond food and beverage establishments.
7) Connectivity – Sidcup has the second highest levels of self-reported walking and cycling in the Borough, yet this element received negative satisfaction with Sidcup residents. Improving traffic and parking was the joint top priority identified by Sidcup residents.

Welling

Geography
Welling is a District centre west of Bexleyheath, located on the old Roman Road from Kent into London. Danson Park lies to its east and Shooters Hill is visible to the west. Welling is a retail and dining destination for residents in the west of the Borough, especially in Welling and Falconwood, with the large supermarkets attracting a wider catchment. The well-connected railway station is located near the western end of the town and Welling is also well served by numerous bus routes. Key assets in Welling are mapped in Figure 17.

History
Until the end of the 19th century when the railway line opened, it was a main staging post on Watling Street – the main Dover to London stagecoach route. This explains the town's long, linear High Street that is now lined with predominantly independent shops and restaurants.

Demography
Falconwood & Welling ward (containing Welling town centre) has the highest median household income of all the 5 town centre wards.

Table 5 Falconwood & Welling ward data

2019 population [xxxiv]	2018 median household income [xxxv]
16,219	£39,310

Population Aged 0-17	Population Aged 18-64	Population Aged 65+
3,355	9,993	2,871
21%	62%	18%

Perceptions of Welling
Businesses viewed the public realm, sense of identity and walking / cycling provision as positive. Town Centre users were more negative about these aspects, but joined the businesses in scoring Welling low on attractiveness, comprehensive offer and sense of safety. They were more positive than businesses about the town's parking provision.

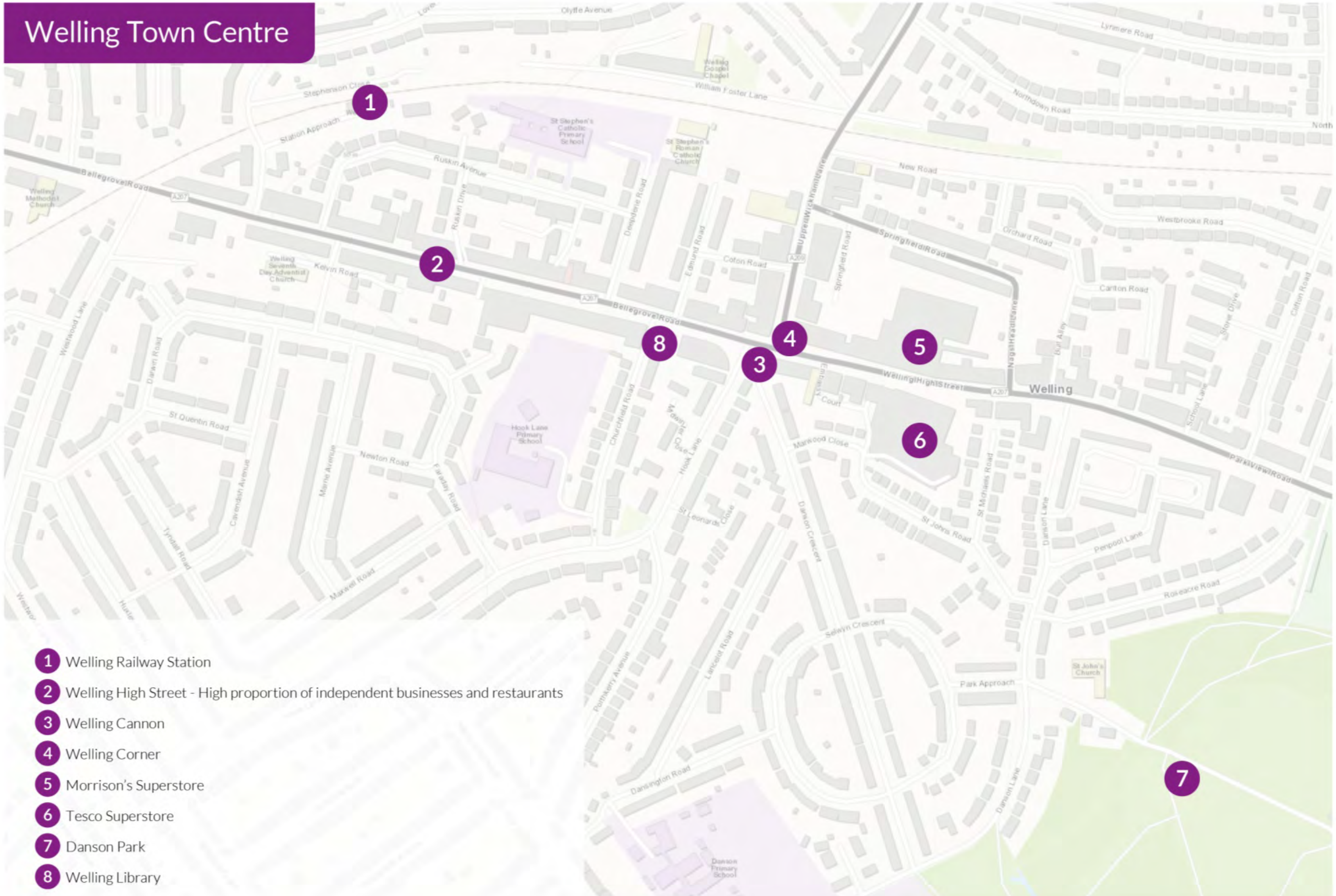
Offering
Welling's offering is strong on food shopping (Convenience retail) and good for the business services and restaurant needs of its users. The Tesco and Morrison superstores are a major draw and feature in 37% of respondent's favourite things about Welling. Amongst residents of the borough, Welling currently captures 9.6% of Convenience spend and 2.2% of Comparison spend.

The composition of commercial floor space in Welling shows that Convenience retail dominates with over 34% dedicated to this use and is well over the UK average of 15.2%. By contrast Comparison retail space (at 22%) is low in comparison with the national average. Leisure Service (including restaurants and cafes) is just over one fifth of floor space and has grown by nearly 19% since 2013 – although still below the UK average. Retail services (including hairdressers, beauty salons, etc.) has seen the most growth in Welling in the last 5 years – with a 24% increase to just over 10% of floor space.[xxxvi]

There were low, and worsening, levels of satisfaction for evening leisure, culture and recreation and Other retail, with no 'Good' responses for culture and leisure. The primary criticism of the offering in these categories was that it is not diverse enough and not all of sufficient quality.

The current (2017) Javelin Venue score for Welling is 558th; this is an improvement from 586th in 2014. This is also surprisingly high given the low levels of satisfaction with the 'Other retail' (comparison) offering and low levels of multiple retailers (19%).

Figure 17 Key assets in Welling



1 Welling Railway Station

2 Welling High Street - High proportion of independent businesses and restaurants

3 Welling Cannon

4 Welling Corner

5 Morrison's Superstore

6 Tesco Superstore

7 Danson Park

8 Welling Library

Accessibility

The car is used by 72% of respondents as one of their main modes of transport into the town centre. However, Welling also has the highest levels of active transport of any of Bexley's town centres, with nearly 60% or respondents walking and almost 20% cycling. When asked what would further increase walking and cycling levels, a third of respondents answered improved bike parking, over 30% of respondents answered improved safety of routes and 28% answered improved visual attractiveness of routes.

Welling has an average Public Transport Accessibility Level of 4, but ranges between 1b and 4. The train station is a 5-minute walk from the town centre and has direct connections to London and Kent and there are six bus routes that start or pass through the town centre.

Welling's businesses

Within Welling town centre there were 276 businesses with two or more employees (as at October 2018) and these provide employment to 2,826 people[19]. The values have grown by staggering 24% and 35% respectively since 2013. However, further analysis shows that this is primarily due to the introduction of a few employment agency companies – if these are removed from the figures the increase in employment drops to 10%.

The shell employment company data may also influence the key sectors of employment rankings. These are as follows in Welling's town centre:

- Business support service activities n.e.c. - 18%
- Other professional, scientific and technical activities –13%
- Convenience retail –9%
- Restaurants and mobile food service –7%
- Medical and dental practice activities –6%
- Comparison retail –5%

The GVA of Welling's town centre jobs is estimated at £194 million.

Welling has a very high proportion of independents (80.8%), many of which serve in providing niche retail, especially around furniture and homeware provision.

Photo 5 Welling Town Centre

Welling's businesses were surveyed about their performance over the past three years. When comparing the performance against the previous three years from 2013, more businesses reported positive

[19] As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the official town centre boundary. These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded. If they were included, the values are 434 and 2971 respectively.

change in all categories, except for footfall. While these are positive trends, Welling still has the least positive/most negatives of any of the town centres according to businesses responding to survey.

Business optimism levels have increased slightly since 2013. Currently 51% of businesses surveyed predicted a positive change over the next 3 years, with the greatest optimism about turnover and profit. Breaking this down, established businesses were less optimistic than newer businesses. Businesses were also asked which factors they thought might be barriers to the growth. The greatest area of concern was the cost of rents and rates, followed by the town centre not being attractive to customers. Lack of customers, strong competition and lack of town centre accessibility also featured.

Welling's current vacancy rate of 5.7% is below both the national and London district centre trends. Core vacancy rates have been decreasing since 2013, while non-core rates have been fluctuating.

Similarly to the other District centres, there has been very limited historical footfall monitoring in Welling – which has been restricted to 1-2 manual count surveys per year. Based on this, average weekly footfall along the high street has taken a downwards trend since 2012.

Analysis of Welling's strengths and weaknesses

What is great about Welling?
Based on feedback from businesses, consumers and local stakeholders these are the main strengths and opportunities for Welling:

- Community feel – fairly friendly
- Free parking at superstores
- Good convenience retail – including Tesco, Lidl and Morrison stores
- Green spaces nearby - Danson Park, East Wickham Open Space and Oxleas Woods
- Independent specialist shops, especially homeware, furnishings
- Lively use of forecourts by some independents
- Permeability of High Street from local residential areas – encourages more walking / cycling
- Residential development – some potential
- Restaurants – reasonable variety
- The Cannon as a local landmark
- Well-connect by train and buses - train station close to the centre
- Library (including workspace) – community space and footfall generator
- Welling Youth Centre

What is not so good?
Users, stakeholders and businesses have identified the following issues and threats:

- Alleys detract from public realm – attract dumping / ASB
- Perception amongst some users and businesses that the location and charges for car parks are off-putting
- Lack of higher end cafes / tea rooms
- Lack of leisure facilities within centre
- Lack of trees / greenery in High Street
- No central public space
- Offer not attracting younger people
- Poor sense of arrival and place – lack of differentiation from neighbouring areas
- Pressure for development may change character
- Public realm tired / not fit for purpose
- Sustainability of specialist independents a potential threat
- Threat of competition from nearby Plumstead (regenerating)
- Tired / poorly maintained shop fronts
- Traffic bound
- Wayfinding is poor

Vision and emerging priorities

Welling vision statement:
Welling will grow as a place in which the town centre experience and diverse independent offering acts as a magnet for residents and visitors alike. Welling will be a vibrant, safe, attractive and unique town centre that is accessible to all.

Town centre users, business and stakeholders were asked about their ideas and priorities for improvement. Increasing the quantity and lowering the cost of parking was proposed by 35% of respondents. Increasing the quality and diversity of shops was the next most prevalent response (22%), closely followed by public realm improvements –e.g. greening (20%) and increasing the leisure offering and the quantity of events and markets (both 16%). This feedback combined with the wider evidence has led to the selection of the below key themes and suggested actions.

The key themes for action arising from this vision include:

1) Accessibility– While Welling has relatively balanced parking provision on each end of the high street and on-street parking, parking was the area with the greatest request for improvement from businesses and town centre users. Welling has relatively high active transport levels, but respondents identified improved bike parking and increased safety and attractiveness of routes would encourage this further.
2) Quality and diversity of retail offering – Town centre users want increased quality and diversity of the shops. Targeted inward investment could help attract retailers, but largely changes in the retail composition will be driven by landlord decisions and market forces.
3) Public realm – Welling had a public realm improvement programme in 2014. Stakeholders have expressed desire for increased greening and visual interest on the high street. An identified gap in the public realm is the absence of a town centre outdoors event space.
4) Leisure offering – Welling has a good restaurant and café and offering that was reflected in the satisfaction levels of its town centre users. Welling had very low levels of satisfaction associated with the other aspects of both its daytime and evening leisure offering satisfaction levels with these have decreased since 2013. Perception of safety has a significant impact on evening leisure satisfaction levels – and based on our survey this has not unfortunately improved since 2013.
5) Support business growth – Welling has a high percentage of independent businesses on the High Street. The training and business support offered by Bexley for Business, and other similar organisations, is especially important for independent businesses to support their success in the changing retail environment. There is an existing town centre partnership, but this does not have high business involvement. However, due to ongoing engagement work with the high street businesses it is expected that a business group for Welling will emerge.

Implementation and Next Steps

The previous chapters looked at the health of Bexley's town centres and their current deficiencies, suggesting measures that could be put in place to safeguard and enhance them. The Council is now working on a delivery plan that will be published in autumn 2019.

The Plan will reflect

- What the Council can do within its own organisation
- How other key stakeholders need to step up
- How and when the strategy will be delivered and reviewed
- How actions will be prioritised and agreed within town centre task group
- What external and internal resources are available
- Monitoring and evaluation of strategy

What the Council can do within its own organisation

It is proposed that the Council will maintain the overarching leadership and responsibility for the delivery of the Strategy.

To successfully deliver the strategy, the Council will ensure all departments play their part to support change. The model set out in Figure 5, illustrates how this can happen to

Shape and implement

- Use of planning and highway functions to help shape and plan future developments.
- Plan new infrastructure, including transport, to serve growing town centres.
- Encourage new investment – both public and private sector.
- Deliver physical projects to improve public realm and transport infrastructure.
- Align strategies across the Council's remit to ensure these have a positive impact on town centres.

Enable

- Apply planning powers to foster good growth and an enhanced retail and leisure offer.
- Guard against inappropriate development in town centres or out-of-town developments that threaten town centre viability.
- Manage the street scene to encourage positive use of forecourts and street trading and to maintain a clean and attractive environment.
- License and regulate provision of alcohol, entertainment and other leisure uses, to foster a diverse, safe and profitable evening / night time economy.
- Monitor and enforce food safety standards to help maintain a healthy food and beverage offer in town centres.

Support

- Respond to community safety issues arising in town centres –in partnership with Police and business stakeholders
- Engage with, and provide support to, business and community organisations to help them deliver positive projects and initiative.
- Coordinate efforts to provide support, advice and mentoring for town centre businesses – especially independents.

Promote

- Communicate the unique positives of each town centre to a wide audience including residents, visitors and potential investors.
- Articulate the vision and potential for each town centre location to help attract new inward investment.
- Publicise initiatives to businesses and town centre users – to foster positive behavioural change (e.g. healthier eating options).

Why other key stakeholders need to play a key role

The successful delivery of the Strategy will require the active participation of a range of town centre stakeholders– a number of whom have already been consulted during the development of this Strategy.

A key element of implementation is to influence and convince key stakeholders to invest money and resources in support of the identified actions. This could be achieved through creating a collective working group, including both public and private sector, who will agree prioritised actions for each town centre. In Bexleyheath this could potentially be based on the existing Master Planning Board. The Council will play the catalysing role in identifying the stakeholders and initiating the process.

Each stakeholder would have a clearly defined reason for being involved and the benefits the Strategy will bring to their organisation. It is expected that all participants will contribute to support delivery, both through financial and/or in-kind means proportional to the respective benefits to their organisations.

The delivery and review process for the Town Centres Strategy

There will be initial meetings with town centre stakeholders focussed on collectively agreeing the priority actions for the Strategy.

For the more substantial elements, all stakeholders will wish to know that their investment will deliver the desired outcomes. This assurance can be achieved through running jointly funded feasibility studies and practical pilot projects to test the practicality and potential effectiveness of proposed projects in a relatively low-cost, low-risk manner. This would be the focus of activity during the first 12 months of implementation.

Due to financial and resource constraints, this Strategy and vision can only deliver tangible benefits if the Council works in partnership with a range of local and regional stakeholders – including commercial businesses. The Council's Town Centres team will support the delivery of this corporate Strategy.

The Bexleyheath and Sidcup BIDs (privately funded not-for-profit organisations) are expected to play a key role in setting the priorities and delivering initiatives in their respective towns. However, their own resources are necessarily limited. Therefore, in collaboration with key stakeholders, the Council will seek additional funding. The options for funding and resourcing the delivery of the Strategy will be included in the delivery plan, which will also set out how the delivery of the Strategy will be managed and monitored.

Funding

To be successful, any delivery plan will need to be resourced. The Council and key partners may be able to deliver some actions identified in this Strategy by adjusting and aligning existing resources. However, the delivery of larger projects will involve seeking additional external funding.

At this stage, a variety of potential funding streams have been identified, as follows:

Council and partner resources:

- London Borough of Bexley's Resources – In the past the Council Town Centres team has successfully regenerated towns by committing Council match funding to unlock significant investment from other parties such as the GLA;
- BIDs – The BIDs are key delivery partners and have access to both their own funds and can apply to some additional funding streams not accessible to Local Government;
- Additionally, partners such as the BIDs and other stakeholders can strengthen joint bids for external funding by offering additional contributions alongside the Council's funding as match.

External funding sources:

- GLA – The GLA is one of the main sources of regeneration and development funding for town centres in London. Current funding opportunities include the Good Growth Fund;
- TfL – TfL is another major source of funding and is currently funding a large portion Bexley's on-going regeneration and transport improvements including the LIP, Healthy Streets and Liveable Neighbourhoods Programmes;
- Central Government - Some central government departments allocate funding to encourage economic growth across the regions – for example the MHCLG has funded several rounds of the Local Growth Fund. Another recently announced potential central government funding source is the £675m Future High Streets fund – and expressions of interest for this were submitted in March 2019.
- Additional grants - There are several foundations, large and small (e.g. The Heritage Lottery Fund), from which funding for specific projects can be sought;
- Private sector development in town centres can either directly or indirectly fund and implement some of the necessary town centre actions (e.g. through Community Infrastructure Levy).
- Community funding models – The Council is exploring funding options for community-led solutions in Bexley including the Bexley Community Fund, raised through the Bexley Community Lottery and investing in a civic crowdfunding platform which could be used for projects and events that seek to bring people together and revitalise shared spaces and local town centres.
- Commercial sponsorship and income generation – This will be explored and could be through rental of commercial space or co-working space.

Monitoring and Evaluation

The impact of the Strategy will be monitored in several ways as it is implemented. Ongoing measurement of the health of each town centre will be done by using a basket of different indicators such a footfall, vacancies, spending patterns, business performance and confidence.

Each programme or project which is commissioned for the Strategy will also have an element of evaluation built into the project plan. Key Performance Indicators devised for each project will measure its success and contribution to the overarching Strategy outcomes.

The monitoring information from regular town centre health checks and project evaluation data will be reported to the relevant town centre partners.

Whilst there will be a commitment to continuously monitor the overall health of town centres, and the outcomes of individual projects, the overall Strategy will be reviewed at least 4 years after its adoption – and it is expected that the Strategy would require some refreshing at this stage taking account of both local and national trends.

Glossary

- Acorn CACI - Acorn is a segmentation tool which categorises the UK's population into demographic types. Acorn provides a general understanding of the attributes of a neighbourhood by classifying postcodes into a category, group or type. For definitions of the classifications, please refer to https://acorn.caci.co.uk/downloads/Acorn-User-guide.pdf
- Business Improvement District (BID) – A Business Improvement District (BID) is a defined area within which businesses are required to pay an additional tax in order to fund projects within the district's boundaries. The BID is often funded primarily through the levy but can also draw on other public and private funding streams.
- Culture and Leisure – Used in this document to refer to a broad offer of services related to leisure, socialising and culture – which includes food and beverage (pubs, clubs and bars), recreation and active leisure (e.g. gyms, bowling, leisure centres, etc.) and cultural venues (e.g. art galleries, performance spaces, libraries and cinemas). See also Evening Leisure.
- Comparison Retail - This is the range of goods which consumers purchase relatively infrequently and so they usually evaluate prices, features and quality levels before making a purchase. Examples of comparison retail include fashion, electronics, and major appliances
- Convenience Retail – This is the range of goods that consumers tend to buy relatively frequently. This is broadly defined as food, drinks, tobacco, newspapers, magazines, cleaning materials and toilet articles.
- Evening Leisure – used in this document to denote the provision of venues for socialising and recreation from 6pm onwards, including eating and drinking establishments, cinemas, music venues, theatres, etc.
- Gross Value Added (GVA) – gross value added (GVA) is the measure of the value of goods and services produced in an area, industry or sector of an economy.
- Healthy Streets – this refers to the Healthy Streets Approach which is advocated by Transport for London (TfL) and supported by the Bexley LIP which provides local context. The Healthy Streets Approach is a system of policies and strategies to deliver a healthier, more inclusive city where people choose to walk, cycle and use public transport. More details can be found here: http://content.tfl.gov.uk/healthy-streets-explained.pdf
- Javelin Venue Score - The Javelin Value Score evaluates each shopping venue in terms of its provision of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.
- National Multiple – An outlet of a national brand, in other words a chain store
- Place Marketing and Branding – the practice of treating a place as a saleable proposition, made up of its various unique characteristics and offerings, which can be marketed using various channels – resulting in increased consumer usage and loyalty, and interest from business investors.
- Public Transport Accessibility Level (PTAL) - a method used to assess the access level of geographical areas to public transport. The scale ranges from 1 (lowest) to 6 (highest). The Bexley borough average is 1b
- Purple Pound - The 'purple pound' is a term used to describe the spending power of disabled people and their families.
- Unhealthy Businesses – terminology developed in 2015 by the Royal Society for Public Health (www.rsph.org.uk) to describe a variety of outlets on the high street considered to have a cumulative negative impact on the health of the local population. This includes tanning shops, off licences, fast food outlets, bookmakers and high cost credit outlets (e.g. cheque cashing).

Appendices

Appendix A – Methodology

This is an evidence-based Strategy based on both statistical and anecdotal evidence. The sources of data are indicated throughout the document and summarised in the Endnotes. The primary data collected and stakeholder engagement workshops are detailed below. These include:

- Bexley Town Centre user online survey
- Bexley Town Centre business survey
- Sidcup Partners (BID) business survey (October 2017)
- Saturday Town Centre audits
- Lunchtime stalls in Council atrium to garner staff views
- Stakeholder visioning workshops for Bexleyheath, Sidcup and Erith

Town Centre user views

Between May and July 2018, an online Town Centre User survey was run for town centre users (residents, workers, visitors, students) and received 392 responses as detailed below. The responses were from residents, but also other town centre users (e.g. shoppers, workers and students). There was a robust response for Bexleyheath and a moderate response in the other town centres.

Town Centre	Survey respondents	Residents responses as percentage of total
Bexleyheath	211	48%
Erith	63	48%
Sidcup	42	55%
Crayford	37	32%
Welling	39	72%

In terms of demographics of survey respondents, only 60% of respondents provided information on their gender and age, of those that did the responses were 66% female, 33% male and 1% non-binary. In terms of age, age identified responses were from a mature working population – only 18% were less than 35 and 14% over 65.

Town Centre business views

Between May and July 2018, a Town Centre Business Survey was run to garner views and feedback on performance of our town centre businesses. In all Town Centres businesses were randomly selected and visited by Council Officers for face-to-face survey interviews.

There were different levels of responses across our Town Centres. The target was 10% of businesses, but the Sidcup BID undertook a survey of 71 businesses in Autumn 2017, which provides us with supplementary information on businesses in Sidcup and has been used as a basis for the Sidcup business responses.

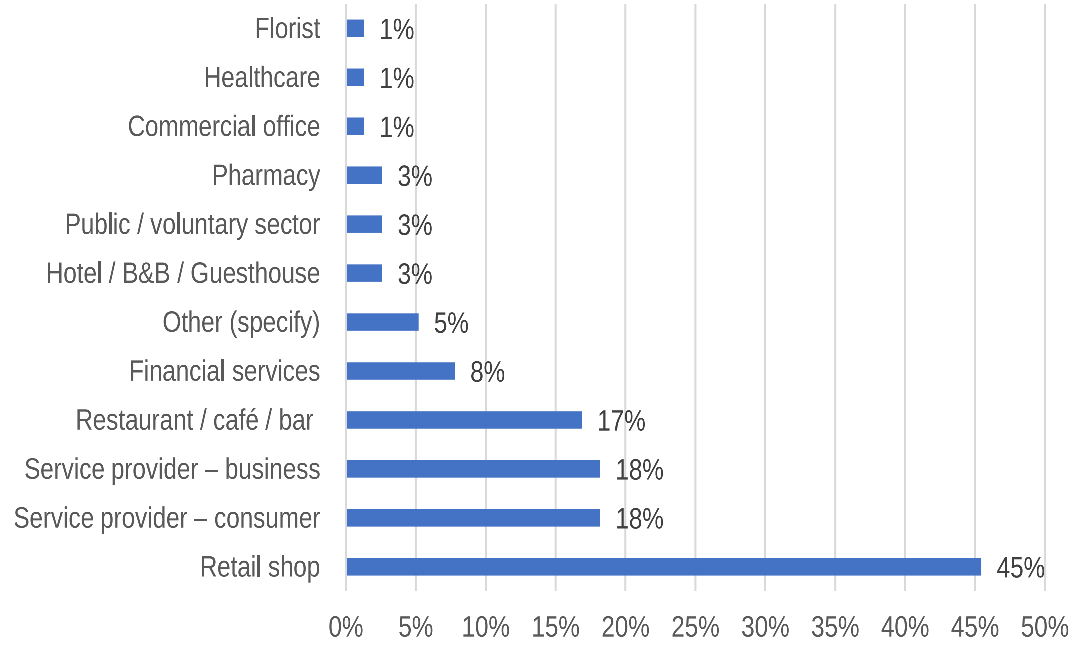
Town Centre	Number of Responses Received	Number of Businesses recorded in Bexleyheath Shopfront Surveys[20]	Percentage complete
Bexleyheath	27	227	12%
Crayford	8	43	19%
Erith	10	88	11%
Sidcup	10	256	4%
Welling	18	242	7%
Total	73	856	9%

Sidcup Partners Business Survey

Sidcup Partners conducted their first annual business survey in October 2017, with responses covering 77 town centre businesses covering both the town centre and Sidcup Station parade. A summary of the types of businesses interviewed is summarised in Figure 18. Full details of the survey can be requested from Sidcup Partners.

[20] At the time of the doing the Business Survey, the Council did not have the ONS IDBR business data, so survey targets are based on the Bexley Shopfront Survey Data.

Figure 18 Range of Sidcup Businesses



Saturday Town Centre audits

On Saturday the 2nd and Saturday16th of June – staff members conducted town centres audits in each of Bexley's 5 main town centres. Areas of focus included demographics, public realm, environmental factors, high street composition and the overall perceived atmosphere.

Lunchtime Stalls

Members of the Town Centre's Team held three lunchtime sessions in the Council's atrium on July 3rd, 5th and 9th. Council Staff were targeted as they work on a wide range of issues in the Town Centres across the Borough, as well many of them being long residents. Staff were specifically asked to feedback about their Favourite Things and Suggestions for Improvement.

Appendix B Tabular Versions of Strategy Figures

Tables containing the data of selected figures in the main body of strategy are presented below.

Table 6 – Details from Figure 1 Map of Bexley's Town Centres

Town Name	Hero Assets	Town Centre Population	Number of jobs	Number of businesses	Peak/Average Weekly Footfall	Gross Value Added
Bexleyheath	The main retail, commercial and leisure hub of the Borough with the Broadway Shopping Centre, Market Square and Danson Park	8,600	8,300	383	144,000/63,200	£550 million
Sidcup	The cultural capital of the Borough with two international performing arts and music colleges	7,174	4,400	319	16,000/7,900	£360 million
Erith	Situated on the Thames Riverside - home to a newly refurbished Carnegie library, Riverside Gardens and London's longest pier	5,900	2,900	142	22,500/11,300	£196 million
Welling	A successful high street with high numbers of independent businesses	8,000	2,800	276	16,900/8,000	£194 million
Crayford	Contains the lovely Cray Gardens, Crayford Marshes and the successful Tower Retail Park	4,300	3,900	256	22,600/4,800	£258 million

Table 7 Summary of vacancy rates in Bexley's town centres (Data for Figure 6 Vacancy rates in Bexley's town centres)

Vacancy type	Bexleyheath	Sidcup	Erith	Welling	Crayford	National Level	Outer London District Centre
Overall vacancy rate	11%	8%	7%	6%	8%	11.10%	6.40%
Core vacancy rate	1%	8%	4%	4%	13%	N/A	N/A
Non-core vacancy rate	20%	7%	10%	7%	6%	N/A	N/A

Table 8 satisfaction with the Culture/Leisure Offering (Data from Figure 7 Town centre user satisfaction levels with the culture and leisure offering)

Town Centre	Culture/ Recreation Satisfied	Culture/Recreation Unsatisfied
Sidcup	14.29%	52.38%
Erith	3.18%	74.60%
Welling	5.26%	78.95%
Crayford	2.94%	73.53%
Bexleyheath	26.42%	27.46%

Table 9 Town centre user's satisfaction with Bexleyheath's offering (data for Figure 8 Town centre user's satisfaction with Bexleyheath's offering)

Category	Bexleyheath 2013	Bexleyheath 2018
Attractive Place to Spend Time	3.7	2.8
Comprehensive Offer	3.8	3.2
Sense of Safety	3.5	2.7
Public Realm	3.9	3.1
Signage	3.5	3.3

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