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 particular classifications, please refer to [https://acorn.caci.co.uk/downloads/Acorn-User-guide.pdf](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 was first included in Transport for London (TfL) policy in 2014. 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](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

- **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).

- **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).
Introduction

Town Centres are a key part of the Council’s overall strategy for delivering good growth in the borough. Town centres provide identity and personality and are places for residents to live, work, 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. 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. The key driver for the development of this strategy is therefore to propose measures which will protect and maintain this growth.

Bexley has a hierarchy of town centres, ranging from Major Centre to Neighbourhood Parades. 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). Bexleyheath has a diverse offering that includes retail, offices, leisure and entertainment facilities, while the District Centres tend to meet a more local need.

Town centres nationally 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 1100 stores from Britain’s top 500 high streets during just the first half of 2018, with the trend forecast to continue. From observed local data Bexley’s town centres are not immune from the change sweeping through high streets across the UK.

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.
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 competing town centres are already heavily investing in improving their town centres – without concerted effort to help them adapt, Bexley’s town centres could be left behind. These trends will be explored further in the ‘Changing Town Centres’ section.

The character of a town centre 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 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, but research suggests that middle-ranking major and district centres are more vulnerable to national trends than smaller local centres, as major national retailers are becoming increasingly selective in choosing locations to invest.

The Bexley Town Centres Strategy will seek to safeguard and enhance the key town centres, and seek to develop a positive engagement with all town centre users and stakeholders, including businesses, investors and residents.

Purpose
This Strategy is designed to provide an overarching framework for the development of Bexley’s main town centres over the next five years. It is targeted to Council stakeholders and key partners, who will play a significant role in enhancing the towns’ vibrancy and economic success. 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 – which in turn will have a beneficial effect on the Council’s sustainability.

The purpose of the Strategy is not to provide a detailed, fully costed action plan, but rather – based on the research - 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 borough’s town centres. This involves setting out some key priorities for action, for the Council and its partners to agree to. Following this commitment, the actions suggested will then need to be tested, costed and funded before the Strategy programme can be fully rolled out in a collaborative way over the coming 5 years.

A key part of the Strategy will be to define ways in which the Council can work with other town centre 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.

This is an evidence-based Strategy and has been developed following extensive research - both statistical and anecdotal to build a picture of the strengths and weaknesses of our town centres and understand what are the opportunities and threats they face in realising each town’s potential. Details of the methodology for the Strategy development, including the data collection and consultation processes are provided in Appendix A – Methodology. In setting out the evidence within the Strategy some of the words or phrases used may be unfamiliar to readers, and so a Glossary has been provided.
Changing Town Centres across the UK

Even a casual observer would be unable to ignore the succession of news stories regarding national retail chain failures during 2018. These failures have resulted at the very least in desperate rescue measures and downsizing or, more frequently, national store closures programmes. 2018 has seen the disappearance of many household names from the High Street – for example Maplin, Poundworld and Toys R Us – some of which have left voids in Bexley’s town centres.

According to the Centre for Retail Research, as of September 2018 the number of medium or large retail businesses going into administration during 2018 reached 30, closing over 2000 stores and impacting 39,000 jobs. This puts it on course to be the worst year for store closures since 2012 (see Figure 2).

Industry bodies such as the British Retail Consortium 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 be the death 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. However, the proportion of sales being transacted online are expected to increase to 31%. 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 simply shopping.
The successful future high street is likely to be driven by the human need for social contact, experience of good customer service in a pleasant and safe environment, with seamless digital connectivity. The way customers approach purchasing has become increasingly complex involving both online and offline channels. In 2017, the sectors which have seen net increases of outlets on the high street are those intrinsically linked to experience and service (e.g. barbers and cafes). 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 key message to take away is that the current changes are emphatically 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.

### Changing Bexley

Bexley is changing in a variety of ways – some that pose challenges and some that present opportunities for Bexley’s town centres. Bexley is:

- **Growing** – Bexley’s Population is predicted to increase by almost a tenth over the next ten years.³
- **Aging** – The population aged over 65 is predicted to almost double over the same time period because residents are generally living longer⁸;
- **Diversifying** – The population will also diversify, with the Black and Minority Ethnic population expected to increase to over a quarter by 2028.⁹
- **Increasing in weight** – Both Bexley’s adult and child populations are increasing in weight. Over the next five years, without positive intervention the percentage of overweight and obese 10–11 years is expected to increase by 6%⁴ to 41% of Bexley’s children;¹⁰
- **Improving transport links** – The introduction of Crossrail to Abbey Wood will be Bexley’s first TFL rail link, which will improve accessibility especially for the northern part of the borough. It is hoped that further transport improvements will be implemented (for example the Council and other organisations are lobbying for a Crossrail to Ebbsfleet extension (C2E)).

Across Bexley, the Council and its partners are working to mitigate and capitalise on the trends. The Council has a collection of integrated strategies to achieve its Corporate Strategy, which this Town Centre Strategy also will contribute to.

³ Borough population estimated increase of 9% over the next ten years (an increase of almost 23,000 from 2018 to 2028)
⁴ This 6% increase is equivalent to a 2 percentage point increase from 39% to 41%.
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 outlined below.

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.
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 4.

Figure 4 Roles Bexley Council plays in shaping town centres

To Shape and Implement:
- Developing spatial and strategic plans that shape the future physical and occupier changes in a town centre, and encourage new investment. Transport and Infrastructure planning works could have a transformational impact on accessibility and vitality of town centres.
- Delivering physical projects - improving the public realm can have a significant effect on the safe and prosperous operation of a town centre. The accessibility of a town centre by car, foot and bicycle is a key factor in its success.
- Delivering strategies and implementation programmes covering many elements of town centres, including community cohesion, safety, social care and obesity reduction

To Enable:
- Creating the right enabling environment to encourage stakeholders to make improvements and enhance the character and life in the town centres.
- Planning permission and enforcement including of appropriate development and design quality for the built environment.
- Public Realm including street trading, shop fronts, forecourt usage and enforcement against enviro-crime.
- Licensing of regulation business hours and operations, including of alcohol sales provides a legal framework for a well-managed and diverse evening and night-time leisure offering.
- Monitoring of Environmental Health helps create and maintain a safe and healthy food and drink offering in town centres.

To Support:
- Working in partnership to support the maintenance of law and order, and improving safety in all our town
- Supporting town centre businesses and organisations – such as BIDs – and plays a coordinating role to ensure that the efforts of Council teams and external partners are directed for maximum benefit
- Coordinating the delivery of business training and support, through the Learning and Enterprise College Bexley and links with other learning and support providers

To Support:
- Communicating the benefits of the borough and its town centres to external audiences.
- Articulating a revised vision for a location to help stakeholders better understand its future potential – thus helping to attract new inward investment from both public and private sources.
- Seeking opportunities to celebrate and showcase Bexley’s cultural capital to a wider audience.
- Publicising initiatives in town centres to the local residential population and encouraging behavioural change (e.g. the take up of active transport or promoting healthier eating options).
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 5).

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 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.

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.

Potential actions to improve business health include targeted inward investment, meanwhile use and start-up support - which are key aspects of any approach to sustaining healthy high streets.

Digital economy

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.

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. Just over half of the town centre businesses responded that they have social media strategies and online marketing strategies.

Of the surveyed businesses worried about loss of business to online competitors – 90% of them have websites, 85% have a social media presence and 70% of them 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 of the London Boroughs in terms of percentage of the population who use the internet at 94%.xiii

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 culture and leisure offer and overall experience in town centre locations is becoming a key factor in their success. When surveyed, Bexley’s town centre users had low levels of satisfaction with their experience and this is on a negative trend in all of our town centres in comparison to town centre users’ views in 2013.

The town centre experience can be broken down into a number of elements, as follows.

Diversifying the retail and leisure offer

As can be seen from Figure 6, Bexleyheath had the highest level of satisfaction, with just over 40% satisfied with the culture and leisure offering and Sidcup had only 15% satisfaction, while Welling, Crayford and Erith all had over 70% of respondents reporting dissatisfaction.

Figure 6: Town centre user satisfaction levels with the culture and leisure offering

Probing further into the culture and leisure offering, 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 (for retail, leisure and community infrastructure) reduces the attractiveness of a town centre and is a barrier to its success. The evidence points to reduced levels of satisfaction with the offer in all of our town centres, compared

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The culture and leisure offering includes food and beverage, active leisure and recreational activities (e.g. gyms, bowling), art and performance spaces and cinemas.
to five years ago. The graph in Figure 7 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.

**Figure 7 Town centre user’s satisfaction with Bexleyheath’s offering**

![Diagram showing satisfaction levels in different areas of Bexleyheath offerings](image)

**Place making and public realm**

With increasingly fierce competition for Bexley residents’ time and disposable income from the internet and out-of-town shopping centres, people need a compelling reason to visit the borough’s town centres. In some centres the predominance of national chain stores, whilst often an attraction, can present a ‘clone town’ look which reduces the apparent uniqueness of the offer, and in other locations the lack of distinctive and attractive civic spaces or difficult access can reduce the draw for potential visitors and shoppers.

Simply put, place making in the context of town centres is the art of creating, through a variety of disciplines a sustainable, healthy, distinctive and attractive place for people to live, work, shop and socialise. 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.

When comparing perceptions for all of the town centres between 2013 and 2018, only Sidcup had a positive change in the perception of the attractiveness and the public realm with over 50% of positive responses. 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 in 16% more spend than a 1-3 score.

**Accessibility and Wayfinding**

User research has shown that in most of Bexley’s towns the car dominates as a means of transportation into each centre – which can have consequences with regards to congestion, pressure on car parking spaces and reduced air quality. Based on research, 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. Nevertheless, it is expected that for the majority of town centre users the car will remain as the main means of access and 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. A number of interventions – from improved bus access and interchange facilities and full public realm schemes through to improvement to wayfinding, shop-mobility schemes and bike parking – should be considered.
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.

Where possible, the Council and its partners in each town centre should develop a year-round coordinated programme of varied and high quality events and markets – and also seek to introduce more suitable event spaces in town centres where this is limited.

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 Bexley’s only 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.

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 people’s perceptions, and this may be a barrier to the development of a healthy and diverse evening and night-time economy. In all of five town centres, town centre users reported decreased safety levels in comparison with 2013 responses.

Place marketing
Each of Bexley’s town centres has unique selling points (USPs) – such as Erith, which enjoys the proximity of the River Thames, or Sidcup with its winding High Street and proximity of 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 USPs to be fully understood by all partners and for efforts to promote town centre benefits to be properly coordinated to achieve maximum impact.

Alongside the identification and dissemination of USPs there also needs to be consideration for developing a brand in respect of each town centre (or revamping existing branding) which celebrates and links to the location’s unique ‘hero assets’. For example in Crayford, this could be the Cray Gardens.

Linked with the Digital Economy agenda, town centre marketing and branding strategies should incorporate the use of all digital communication channels, including social media. Place marketing should not only focus on raising awareness of each town’s benefits to residents and potential visitors, but also contribute to an inward investment programme, highlighting business advantages to potential new occupiers.

**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 have 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

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.

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.
• 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.
• 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.
Common themes – Suggested actions for all towns

Based on the identified needs of Bexley’s town centres and successful interventions in other town centres, a collection of potential short and medium term actions have been developed and are presented in Table 1. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented.

Table 1 Potential actions for all town centres for the common themes

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (within 1 year)</th>
<th>Potential Medium to Long Term Action (2 years +)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Health</td>
<td>- Assist independent businesses with their joint marketing and social media (through training, workshops and mentoring)&lt;br&gt;- Enhance linkage between Bexley for Business programme and town centre businesses&lt;br&gt;- Develop a responsive town centre-relevant business support programme&lt;br&gt;- Improve signposting for new and existing businesses about Council and (where relevant) BID services&lt;br&gt;- Support the set up or re-invigoration of local business groups / trader associations in town centres without BIDs</td>
<td>- Explore options for targeted discretionary business rate relief programme to help attract investment to town centres – especially locations with high vacancy rates&lt;br&gt;- Develop more town centre workspace, including co-working spaces&lt;br&gt;- Provide start-up support including provision of test trading spaces&lt;br&gt;- Develop peer-to-peer support network to help foster cross-selling between businesses&lt;br&gt;- Extend the Business Improvement District (BID) model to non-BID town centres&lt;br&gt;- Develop investment angels/mentoring programme for new businesses</td>
</tr>
<tr>
<td>Digital Economy</td>
<td>- Assist independent businesses to increase and exploit their online visibility – through training and mentoring&lt;br&gt;- Implement smart data capture systems across Bexley’s town centres&lt;br&gt;- Roll out free public Wi-Fi in Bexley’s town centres</td>
<td>- Develop or adopt and promote online digital tools to assist smaller independents to compete in digital marketplace&lt;br&gt;- Explore how Bexley’s digital transformation can help create town centre jobs and opportunities - e.g. enabling new co-working spaces and 5G pilots.</td>
</tr>
<tr>
<td>Town Centre Experience</td>
<td>Night Time Economy</td>
<td>Place Marketing</td>
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</tbody>
</table>
| - Review Council processes to help facilitate more ‘café culture’  
- Review the frequency/quality of the cleansing and litter prevention measures;  
- Develop a tool kit of incentives to help agents/landlords to adopt meanwhile use in under-used spaces  
- Encourage business owners to take more responsibility of own forecourts  
- Build stronger relationships with agents and landlords  
- Increase linkages between events and business benefit – measure the economic impact assessment of events  
- Encourage more healthy eating options – for new and existing F&B operators, especially takeaways through, for example, promoting the Healthier Catering Commitment.  
- Promote Bexley’s town centres as being safe locations and incorporate Healthy Streets principles  
- Review of cycle parking provision and where possible, upgrade or enhance existing cycle parking | - Undertake evening and NTE audits and develop a NTE action plan for all town centres  
- Support initiatives to improve safety in the evening and night time economy – for example upgrade of CCTV system through pan-London framework  
- Support promotion of anti-drink driving messages and take up of Responsible Retailers scheme | - See town centre specific action tables (below)  
- See town centre specific action tables (below) |
| - Develop improved culture and leisure offering (detailed in individual town centre tables below)  
- Implement accessibility improvement schemes including improved linkages to/from and within town centres | - Implement NTE action plans  
- Expand the range of evening leisure activities, especially non-alcohol based |
Introduction to Town Centre profiles

The following 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, followed by a vision statement and key themes for action based on analysis of the research.

The identified potential actions for each town have been divided into three implementation phases:

- **Short-term actions** are to be potentially implemented by the Council and its partners over the first year of the strategy. These are a collection of quick wins, along with some pilot projects and preparatory studies needed to progress medium-term actions. Many of these are implementable within existing resources and budget by the Council or partner organisations.

- **Medium-term actions** are to be potentially implemented – subject to securing sufficient additional resources - by the Council and its partners over the second and third years of the strategy. In this phase, based on the previous preparatory studies, larger projects will start to be implemented.

- **Long-term actions** are to be potentially implemented by the Council and its partners in year four and beyond – subject to sufficient additional funding being secured. These include the implementation of larger and longer-term projects and development of the next phase of the medium term projects. It is expected that there will be a review and refresh of the Strategy in 2021/22 that will more clearly develop the long-term actions.

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 9.

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.

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6 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 9 Key assets in Bexleyheath

1. Pedestrianised Market Place and Clock Tower
2. Christ Church
3. Western End of Broadway - Heart of the NTE
4. Bowling Alley
5. Bexleyheath Library
6. Broadway Shopping Centre
7. Eastside Quarter - New mixed-used development
8. Bingo & Cinema
9. Bexley Civic Offices
Demography
There is a relatively well-off population with disposable income living in the proximity of the town centre, with the majority falling into the ACORN classification of affluent or comfortable – especially to the south of the town. Many of the shoppers and visitors to the town centre come from the north of the Borough, which in general are less affluent than the south of the Borough.

In terms of demographic data, Bexleyheath Ward has a significantly higher percentage of residents that are 50+ than in other areas of the Borough. With some planned large-scale residential developments in the town centre either in construction stage or under discussion, town centre population is expected to increase significantly over the next 5 years.

Perceptions of Bexleyheath
When surveyed, Bexleyheath town centre users were generally satisfied with the comprehensive offer, public realm, 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 an 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%.

When town centre users were surveyed about Bexleyheath's offering, they were on average neutral or satisfied across all categories. 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. Javelin also ranks town centres based on their appeal to younger or older customers and Bexleyheath ranked 8th out of all of the UK in its offering to younger customers.\(^7\)

**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 an average Public Transport Accessibility Level of 5 (out of a range 0 to 6) – 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 10 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.

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\(^7\) 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.

\(^8\) This is based on the composition of the national multiple shops and their appeal to a younger audience e.g. H&M, Primark, Game
Bexleyheath’s Businesses

Bexleyheath town centre had 383 businesses with two or more employees and these provided employment to 8,283 people\(^\text{10}\). 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%

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\(^\text{11}\) 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%.\(^\text{xii}\) 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 11. The two greatest areas of concern were high costs of rent and rates (50%) and loss of business to online competitors (42%).

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\(^{10}\) 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 not physically work in the town centre. If they were included, for Bexleyheath the values are 536 and 8,422 respectively.

\(^{11}\) 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.
Figure 11 Identified Barriers to Growth

- High cost of overheads including rent and rates
- Loss of business to online competitors
- Strong competition from other businesses
- Lack of customers for your services/products
- Town Centre area not attractive to customers
- Parking
- Other (please specify)
- Town centre are not accessible to customers
- High staff costs
- Premises too small or unsuitable
- Cost of complying with regulations
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 (many free)
- 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
Vision and emerging themes for action

**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 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 and suggested actions.

The key themes for action arising from this vision are as follows:

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 is often viewed as ‘Any town’, 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 ensure that the town’s unique selling points are understood by all partners, and it is important that efforts to promote the town centre are properly coordinated to achieve maximum impact. Potentially ongoing promotions as part of new developments such as Eastside Quarter (on old Civic Offices site) may help to develop the Bexleyheath brand.

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 public realm is in need of a full redesign to incorporate higher quality materials, more planting and opportunities for fun and leisure – including appropriate events space and infrastructure, taking account of the needs and expectations of 21st Century town centre users. The place making element of the strategy for Bexleyheath should be viewed in the context of a developing Masterplan for Bexleyheath, which aims to shape a long-term vision for the town, introducing new buildings, spaces, uses and connections to ensure it can remain a relevant and successful town for the 21st century.

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. Potentially a coordinated approach to improving the physical environment – e.g. shop front improvements – practical support for independents and potential sub-branding of the quarter could help to improve its vitality, along with the
development of a longer term vision for this quarter of the town in the Masterplan.

4. **Secondary school students** – The need to both mitigate and capitalise on 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. Robust multi-partner strategies now need to be put into place to control the poor behaviour of some students, facilitate more rapid dispersion away from the centre, and engage with students to encourage a better town centre relationship with potential customers of the future and indeed, tap into that customer base now with appropriate goods and services.

5. **Accessibility** – 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. A major asset to the town centre is the bus interchange – providing access to a wide area of SE London and Kent. This facility should be preserved and where possible, route options enhanced. Although there are a number of large public car parks in and around the town centre – a review is needed of the extent to which this provision is adequate, of sufficient quality and at the right price to attract shoppers and visitors.

6. **Modernising the leisure / socialising offer** – The lack of diversity and quality in the leisure offer reduces the attractiveness of the town centre and is a barrier to its success. Longer term this would need to be tackled through the Master planning process, but in the short to medium term market testing of new and emerging leisure options (including both food / beverage and entertainment offerings) could be achieved through meanwhile use of vacant spaces and pop-up events.

7. **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. Revisiting the Bexleyheath Night Vision strategy (2010) is a good starting point, as would a review of the Council’s approach to licensing hours in the town to ensure that the ability of businesses to compete with neighbouring centres is balanced with the needs of local residents.

8. **Events and pop-ups** – A year-round coordinated programme of varied and high quality events is considered beneficial to help drive footfall to the town centre and provide opportunities for the borough’s increasingly diverse community to meet and celebrate together. The introduction of a regular market (e.g. farmers market) for the Broadway should also be trialled and potentially developed.
Suggested Actions
Table 2 presents potential actions which could be followed up by the Council and its partners for each theme that would help Bexleyheath achieve its vision. Note that only actions which are specific to Bexleyheath are included here. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented. Additional interventions which contribute to common themes and which could be applied in all town centres are summarised in Table 1 above.

### Table 2 Potential town centre specific actions for Bexleyheath

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (Completed in Year 1)</th>
<th>Potential Medium Term Action (Completed in Years 2-3)</th>
<th>Potential Long Term Actions (Completed in Years 4+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place marketing and branding</td>
<td>- Develop and implement coherent annual marketing and social media strategy with key stakeholders</td>
<td>- Expand marketing focus to capture market share across southeast London and Kent.</td>
<td>- Review and potentially rebrand Enjoy Bexleyheath and sub-brands</td>
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<tr>
<td></td>
<td>- Develop an inward investment prospectus</td>
<td>- Continue to proactively market potential occupiers to agents Review town centre loyalty programme</td>
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</table>
|                               | - Improve the physical place branding to enhance the sense of identity including potential sub-branding for different areas of the town | - Imple
<p>|                               | - Implement big publicity stunt. Proactively market potential occupiers of voids to agents                          | - Ensure that any public realm design reduces current ASB and crime issues on Broadway                                 |                                                                                                                     |
| Place making / Public realm enhancements | - Improve understanding of the use of space at different times of day                                              | - Review lighting - improve illumination and highlight historical buildings                                          | - Implement full scale public realm redesign and improvement programme                                              |
|                               | - Declutter and repair existing public realm and pavement surfaces;                                                 | - Prepare for a comprehensive public realm improvement scheme (Including for the Western End) – may emerge through the Bexleyheath Master planning process |                                                                                                                     |
|                               |                                                                                                                     | - Ensure that any public realm design reduces current ASB and crime issues on Broadway                                |                                                                                                                     |</p>
<table>
<thead>
<tr>
<th>Supporting the Western End of the Broadway</th>
<th></th>
<th>Continue the development and marketing of the Western Quarter</th>
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<tbody>
<tr>
<td>- Develop visual markers and cues to help give the western end of the Broadway its own unique branding</td>
<td>- Implement shop front improvement scheme</td>
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<tr>
<td>- Host or extend town centre events into the Western End – for example through using venues for live music or food festivals</td>
<td>- Develop western end into its own quarter and establish / market western ‘Quarter’ as a sub-brand</td>
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<tr>
<td>- A number of business support activities that would be applicable to Bexleyheath’s Western End businesses are suggested in the common themes chapter, above.</td>
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<tr>
<td>Supporting the Secondary School Students</td>
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<td>Increase additional after school activity offerings</td>
</tr>
<tr>
<td>- Develop integrated action plan with all stakeholders to coordinate action and increase awareness of town centre safety needs</td>
<td>- Increase the capacity and marketing of after school activity offerings including a pop-in engagement centre</td>
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<tr>
<td>- Pilot use of meanwhile uses in Market Place to disrupt student movement</td>
<td>- Establish a regular teenage market and enterprise club</td>
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<tr>
<td>- Encourage schools and students to provide entertainment in the Broadway</td>
<td>- Develop targeted advertising for students</td>
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<tr>
<td>- Develop a marketing programme to attract shoppers back to town centre late afternoons / early evenings (linked to later opening for retailers)</td>
<td>- Introduce town centre ambassadors to engage with secondary school students</td>
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<tr>
<td>- Introduce regular pop up activities for the centre of the Market place area to ‘disrupt’ the space – helping to disburse larger groups</td>
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<td>- Lobby for transport improvements (esp. buses) to assist with quicker dispersal</td>
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<td></td>
</tr>
<tr>
<td>Accessibility</td>
<td>Modernising the leisure/culture offer</td>
<td>Night Time Economy</td>
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<tr>
<td>- Audit of provision of facilities for town the full spectrum of town centre users (e.g. toilets and changings spaces, physical accessibility and customer care);</td>
<td>- Audit the culture and leisure offer and requirements, including through the Bexleyheath Master planning process</td>
<td>- Promote Bexleyheath as a safe town – challenge perceptions through dissemination of positive news stories</td>
</tr>
<tr>
<td>- Review of car and cycle parking provision, including enforcement;</td>
<td>- Engage with landlords and agents on the future of Bexleyheath.</td>
<td>- Support and encourage a programme of night time events (e.g. Thursday late nights, comedy nights, open-mike nights, capitalise on performing arts colleges)</td>
</tr>
<tr>
<td>- Manage vehicular access arrangements for the pedestrianised areas of the Broadway;</td>
<td>- Feasibility study of developing underused spaces into new meanwhile leisure offerings</td>
<td>- Review the licensing hours and the management of the dispersal of late night customers.</td>
</tr>
<tr>
<td>- Review of wayfinding including both physical and digital;</td>
<td>- Develop a programme of meanwhile events</td>
<td>- Undertake an audit of the Evening and Night Time Economy (E/NTE) based on the Purple Flag Award standards</td>
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<tr>
<td>- Develop and implement a town centre accessibility improvement programme to help business capture the 'Purple Pound'</td>
<td>- Encourage the take up of the Healthier Catering Commitment by food outlets</td>
<td>- Increase the number of family friendly restaurants - chain or independent</td>
</tr>
<tr>
<td>- Develop and implement an active transport improvement programme – including enhanced bus facilities;</td>
<td></td>
<td>- Expand the range of evening leisure activities, especially non-alcohol based</td>
</tr>
<tr>
<td>- Develop potential parking improvements including digital parking signs</td>
<td>- Develop and implement wayfinding improvement programme including public transport linkages</td>
<td>- Extend the E/NTE onto the pedestrianised area of the Broadway</td>
</tr>
<tr>
<td>- Develop and implement wayfinding improvement programme including digital parking signs</td>
<td></td>
<td>- Encourage late night cafes</td>
</tr>
<tr>
<td>- Improve bus service to/from railway stations</td>
<td>- Review Bexleyheath's suitability for new transport trends, e.g. electric vehicles and driverless cars</td>
<td>- Develop new leisure uses as part of new developments (subject to Master planning)</td>
</tr>
<tr>
<td>- Improve walking and cycling routes to/from railway stations</td>
<td></td>
<td>- Develop key attractor cultural facilities – e.g. theatre or music venue</td>
</tr>
<tr>
<td>- Undertake an audit of the Evening and Night Time Economy (E/NTE) based on the Purple Flag Award standards</td>
<td></td>
<td>- Extend the E/NTE onto the pedestrianised area of the Broadway</td>
</tr>
</tbody>
</table>

London Borough of Bexley
Town Centres Strategy (Draft)
| Events and pop-ups | - Develop a programme of events on the Broadway, considering smaller, community or business led events  
- Making Bexleyheath Christmas 2019 bigger and better  
- Introduce more music and play into the Broadway  
- Trial a market in Bexleyheath and introduce regular street food. | - Develop a weekly market  
- Host 2-3 events per annum appealing to a regional audience  
- Develop unique spaces for meanwhile use  
- Increase community space and develop a programme of activities including elderly socialising and befriending | - Develop the bandstand in the old fountain area into a performance space  
- Host 3-4 events per annum appealing to a regional audience |
Crayford

Geography
Crayford is a Major District Centre 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 12.

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
Residents in Crayford town centre are predominantly classified by Acorn as ‘urban adversity’ and ‘financially stretched’, with ‘comfortable communities’ residing to the northeast of the town centre. Crayford’s age distribution roughly mirrors the borough averages, with higher than average levels of lone parents and single with no children. Crayford has a higher than average number of residents with an annual income of under £20k and is significantly below the Borough average for residents earning above £40k.

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 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.

13 Crayford residents are a sub-set of town centre users

12 To be renamed a District Centre in the draft Local Plan
Figure 12 Key assets in Crayford

1. Crayford High Street
2. Crayford Mosque
3. Cray Gardens
4. River Cray
5. London Loop Trail
6. Tower Retail Park
7. Propella Statue
8. Crayford Railway Station
9. Crayford Leisure Centre
10. Crayford Greyhound Track
11. Sainsbury's Superstore
12. Crayford Library
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. 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 activities 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 an average Public Transport Accessibility Level of 3. 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.

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. 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.

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14 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.
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%. xxiii

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

[Figure 13 Which factors are barriers to growth or reasons for business decline?]

- High cost of overheads including rent and rates
- Lack of customers for your services/products
- Strong competition from other businesses
- Town Centre area not attractive to customers
- High cost of raw materials, goods and services
- High staff costs
- Other (please specify)
- Cost of complying with regulations
- Loss of business to online competitors
### 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
Vision and emerging themes for action

**Crayford vision statement:**
Crayford will be a connected and attractive town centre 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 for 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. 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, has very limited green presence in the town centre and areas of public realm look tired and are 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 sense of safety. This has declined since 2013, but surveyed residents reported feeling significantly more safe than other town centre users surveyed.

5) **Support business growth** – Crayford has three distinct areas – Tower Retail, Sainsbury’s and the predominantly independent businesses on the High Street. There is currently no business association that bring the groups of businesses together. Building relationships with the business community is a necessary step to understand their needs and to help develop a collective business voice.

**Suggested actions**
Table 3 presents potential actions which could be followed up by the Council and its partners for each theme that would help Crayford to achieve its vision. The stakeholder engagement process provided a collection of potential town centre ideas and projects which could deliver economic vitality to Crayford. Note that only actions which are specific to Crayford are included here. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented. Additional interventions which contribute to common themes and which could be applied in all town centres are summarised in Table 1, above.
### Table 3 Potential town centre specific actions for Crayford

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (completed in Year 1)</th>
<th>Potential Medium Term Action (completed in Years 2-3)</th>
<th>Potential Long Term Actions (completed in Years 4+)</th>
</tr>
</thead>
</table>
| Traffic management           | - Undertake TfL funded traffic management studies to develop strategies for improvement  
- Undertake the OAPF planning development process  
- Investigate the feasibility of improved coordination of roadworks  
- Increase enforcement against HGVs on Crayford Way and overall speed enforcement | - Contingent on the outcome of the traffic studies and OAPF                                                                                                                                                                                                 | - Contingent on the outcome of the LIP and OAPF studies                                                                                                                                                                                                                 |
| Accessibility                | - Investigate accessibility solutions at Crayford Railway station  
- Improve cycle signage  
- Improve pedestrian signage and wayfinding | - Implement high quality, safer cycle routes  
- Support the introduction of a new Strategic Cycle Route following the River Cray  
- Implement a station accessibility solution | - Make town centre more cycle and pedestrian friendly - contingent on LIP an OAPF  
- Potentially pedestrianize part of the high street |                                                                                                                                                                                                                                                                       |
| Public Realm                 | - Review of flood protection measures and develop strategy to address flooding issues  
- Introduce more green landscaping                                                                                                                                                                                                 | - Introduce green walls  
- Design public realm improvement programme – including measures to improve flood protection | - Implement public realm improvement programme                                                                                                                                                                                                                      |
| Evening and night time economy | - Promote as safe town – challenge perceptions  
- Undertake preliminary audit of Evening and Night Time Economy based on Purple Flag standards  
- Where possible, promote healthy businesses and restrict the extension of ‘unhealthy businesses’ | - Target wider E / NTE providers (e.g. wine/gin bar, look at licencing Al fresco dining, street food, board game Café) for inward investment  
- Expand the range of evening leisure activities, especially non-alcohol based | - Further targeting of E / NTE providers for inward investment                                                                                                                                                                                                            |
| Business Support             | - Engage with business community with a view to building capacity                                                                                                                                                                                                 | - Creation of sustainable business association  
- Develop an inward investment pack | - Investigate feasibility of introducing a BID                                                                                                                                                                                                                           |
Erith

Geography
Erith town centre is located 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 draw for residents and visitors are Morrison’s, the Riverside Shopping Centre and the Energie Fitness gym.

Erith has some fantastic assets that are currently underused, including the old Carnegie Library, Erith Pier (the longest in London) and the lovely riverside gardens. Key assets in Erith are mapped in Figure 14.

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
ACORN demographic statistics show there is an economic divide in the town. The more prosperous residents live in the south western area of Erith, severed from the town centre – whilst more of those ‘financially stretched’ are clustered to the southeast and northwest of the centre. Erith is also the most ethnically diverse of Bexley’s main town centres. 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.

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.
Figure 14 Key assets in Erith

1. Erith Railway Station
2. The Exchange
3. Fish Roundabout
4. London South-East College Bexley
5. Christ Church
6. Old Town Hall
7. Pedestrianised Pier Road
8. Erith Library
9. Riverside Shopping Centre
10. Erith Rowing Club
11. Riverside Gardens
12. Thames Path and National Cycle Route 1
13. Erith Playhouse
14. Erith Pier
15. Morrison's Superstore
Offering

Erith acts as a retail and limited leisure destination for residents in the North of the Borough, primarily in Erith and Northumberland Heath. The most popular reason for visiting the town centre are for convenience shopping – e.g. groceries, and household goods – which is to be expected given the presence of a large Morrison’s store and a 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.

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.

The Bronze Age Way (A2016/A206) divides Erith in half and reduces permeability into the town centre, especially for pedestrians. 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, and 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.

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 people15. 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 retail – 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.

Erith is made up of 62% independent retailer and 38% national multiples. Most of the national multiples are housed within the Riverside Shopping Centre.

15 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.
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.\(^{16}\)

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%.\(^{xxiv}\) 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.

\(^{16}\) 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 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 themes for action

Erith vision statement:
In next 5 years, the Council will work with the community to develop Erith as a vibrant, safe, attractive and fun destination for people from all walks of life to live, work and socialise - enjoying a diverse offer, both day and night, built 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. However, there is a need for coordination of marketing efforts to ensure consistency of message and more efficient use of available resources. Part of place marketing is also to develop an inward investment pack to proactively market Erith to potential new occupiers to help deliver the improved offering demanded by town centre users.

2) **Accessibility and wayfinding** – Linked to place marketing, 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. Perceptions around wayfinding and signage have deteriorated since 2013. This needs to be addressed through both a review and rationalisation of the signage and improving the legibility for those who want to access the town centre by foot, bicycle and car. Work has already started on this aspect through the Erith Links project – which will improve linkages between the station and the town centre.

3) **Leisure and evening economy** – In the town centre user survey Erith did not have any positive scores for the evening economy offer – and in fact the offer is extremely limited at present. Footfall data shows that there are very few visits to the town centre after the shopping centre closes at 5.30 (weekdays and Saturday). 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. Therefore there need to be short and long term measures to encourage a wider range of appropriate food and beverage and other leisure operators to locate in Erith – to build a more sustainable evening economy.

4) **Events and markets** – Linked to the Leisure and Evening Economy theme is the need to build a regular programme of special events to attract a diverse audience. These events can be used as a 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. Responses show that people miss the Erith Market and work needs to be done to investigate the feasibility of reintroducing a 21st century version into the town centre.

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.

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. In addition to provision of a retailer-relevant business support programme – which is a borough-wide requirement – Erith would benefit from work to help kick start a business association, and the introduction of appropriate workspace in and around the town centre.

**Suggested actions**

Table 4 presents potential actions which could be followed up by the Council and its partners for each theme that would help Erith achieve its vision. The stakeholder engagement process provided a collection of potential ideas and projects which could deliver economic stimulus to Erith. Note that only actions which are specific to Erith are included here. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented. Additional interventions which contribute to common themes and which could be applied in all town centres are summarised in Table 1.
<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (completed in 1 year)</th>
<th>Potential Medium Term Actions (completed in years 2-3)</th>
<th>Potential Long Term Actions (completed in 4+ years)</th>
</tr>
</thead>
</table>
| Place marketing       | - Utilise and promote the Greater Erith brand  
- Develop a unified marketing approach between partners – establish a regular Promoting Erith Group to ensure collaboration and cross-promotion of events  
- Develop an inward investment prospectus  
- Improve the physical place branding to enhance the sense of identity – especially the riverside element | - Promote Erith within Bexley and wider London/north Kent – to capitalise on ‘seaside’ town feel  
- Develop and implement coherent annual marketing and social media strategy with key stakeholders  
- Proactively market occupiers of potential voids to agents  
- Develop educational links – ‘what does Erith mean to you’ and history of Erith curriculum.  
- Develop new commercial space to cater for a broader range of retailers and service providers extending the Erith offer. | - Review and potential rebrand Greater Erith and sub-brands  
- Expand marketing focus to increase greater market share for retail and leisure spend from amongst borough residents.                                                                                                                                                                    |
| Accessibility and wayfinding | - Audit signage and implement improvements identify and publicise cycling Quiet Routes  
- Implement on-going Erith Links programme | - Improve visual trails through town – e.g. festoon lighting, community art trails  
- Improve sense of arrival – from roundabouts, bus stops and the station  
- Investigate options to improve step free accessibility at the railway station.  
- Improve cycling facilities and links with other towns (e.g. Abbey Wood)  
- Undertake feasibility work on traffic management measures to improve pedestrian access and experience  
- Improve the visibility of the walking and cycling routes in Erith | - Implement traffic reduction measures as identified by feasibility work                                                                                                                                                                                                                                                   |
<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (completed in 1 year)</th>
<th>Potential Medium Term Actions (completed in years 2-3)</th>
<th>Potential Long Term Actions (completed in 4+ years)</th>
</tr>
</thead>
</table>
| Leisure and night time economy | - Develop vacant Pier Rd units into a pop up activity area  
- Introduce a pop up food offering near the pier – Increase awareness of existing leisure offering  
- Where possible, promote ‘healthy’ businesses and restrict the expansion of ‘unhealthy businesses’. | - Encourage family friendly activities – play areas  
- Provide community learning spaces and opportunities that link to maker aspirations  
- Build on cultural diversity in food and beverage offering | - Improve links with Erith Marshes as a leisure asset |
| Events and markets            | - Develop regular programme of events such as Erith Kitchen and annual Pier Festival  
- Increase the presence of music and arts  
- Increase linkages between town centre businesses and community actors, such as the Exchange, Erith Rotary Club and Erith FC  
- Reflect Erith’s diverse community in events. | - Grow Erith Pier Festival into an event with a sub-regional or regional reach  
- Develop a regular market – possibly building on the upcycling/fixing theme  
- Review and develop a programme for under 25’s activities and engagement | - Develop events space (s) connected to the River |
<table>
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<tr>
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<th>Potential Medium Term Actions (completed in years 2-3)</th>
<th>Potential Long Term Actions (completed in 4+ years)</th>
</tr>
</thead>
</table>
| Public realm           | - Improve the greenery in town centre, with more community gardening space and maintenance of existing planting  
- Identify targeted domestic waste management actions  
- Introduce more lighting to bring excitement to the public realm  
- Implement selected public realm enhancements as part of on-going regeneration programmes. | - Improve connection with the river – ‘Peer on the pier’ telescope, Webcam, Photo point  
- Re-design the shopping centre exterior to introduce more visual interest  
- Improve waste management – including promotion of Freecycle, community clean-up days, household waste management education, community litter pickers  
- Develop a public realm improvement programme including the creation of a central focal point  
- Introduce more art into the public realm | - Implement the public realm improvement programme  
- Develop Erith Pier to be suitable for Thames Clipper and other boat services |
| Supporting businesses  | - Develop more work space (e.g. Engine House at the Riverside Centre)  
- Reach out to local businesses to understand their needs and issues with a view to forming a business forum.  
- Implement a range of other business support activities linked to the common themes section. | - Build a sustainable business association or forum  
- Provide a broader range of employment space within or on the edge of town to attract a greater diversity of business types (including maker enterprises).  
- Support business relocation into and around Erith | - Expand workspace offer  
- Explore feasibility of Erith Business Improvement District (BID) |
Sidcup

Geography
Sidcup town centre is a Major District Centre\(^{17}\), 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 15.

Although treated separately in the Planning hierarchy the Sidcup Station parade is considered functionally as part of Sidcup and indeed 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 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.\(^{xxv}\) 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.

Demography
Sidcup is the most affluent of Bexley’s major town centres: Rising Prosperity, Affluent and Comfortable Communities are among the most common Acorn CACI classifications, but there are some pockets of deprivation. Sidcup is a 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.\(^{xxvi}\)

Photo 4 Sidcup High Street

\(^{17}\) Sidcup town centre is to be renamed a District Centre in the draft Local Plan.
Figure 15 Key assets in Sidcup

1. Rose Bruford College
2. Lamorbey Park
3. Station Parade (predominantly independent shops & restaurants)
4. Sidcup Railway Station
5. Bird College
6. Sidcup High Street (predominantly independent shops & restaurants)
7. Sidcup Manor House
8. Sidcup Green
Perceptions of Sidcup

When surveyed, Sidcup town centre users were on the whole 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. 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. Fostering independent businesses will therefore be important to developing 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 an average Public Transport Accessibility Level (PTAL) of 4 – 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 there were 319 businesses with two or more employees (as at October 2018) and these provided employment to 4,431 people. These values have grown by 14% and 12% respectively since 2013, with the majority of the growth in Station Road area.

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.

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18 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.

19 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.

20 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 themes for action

**Sidcup vision statement:**
Sidcup will draw on its cultural, educational and heritage assets to become a place that is known for being creative, lively, attractive and welcoming to all generations and that is a source of pride for both its long-term residents and student. 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 is 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) **Diversify the retail and leisure offer** – The research suggests 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. There is also a need to develop the range of culture and leisure opportunities in the town centre – which can be met through both temporary changes (such as pop-up activities) and more permanent development – such as the creation of a new cinema and library complex.

2) **Foster inward investment** – Linked to the need to bring more diversity of offer in Sidcup is the concept of developing an inward investment programme – creating a prospectus to crystallise the key benefits and advantages of the town as a business location, and then targeting potential occupiers that would bring vitality and choice to the town centre.

3) **Support business growth** – Independent businesses are the backbone of Sidcup’s community – often providing niche services, personal attention and a sense of local identity. However, there is a need to support them to thrive in today’s extremely competitive market. Sidcup’s businesses will be encouraged to take advantage of any borough wide support programme, but it would be considered beneficial also to facilitate the cross-over of talent from the local performing arts colleges to get students assisting businesses in various unique ways (e.g. visual merchandising and shop window displays). It is also considered beneficial to encourage the location of more office workspace (including co-working space) in the town centre to help boost lunchtime and evening footfall.

4) **Events and community engagement** – There is a need to build up the frequency and quality of events taking place in Sidcup 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. This has already been started in previous years through the Sidcup Fringe initiative but this should be enhanced to extend the range and quality of entertainment on offer – 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. There is therefore a need to look at how to create permanent or temporary spaces which could provide a traffic free space for community events and markets.
5) **Place marketing** - Sidcup has a number of unique selling points – including the arts colleges, beautiful green spaces, an attractive high street and a rich heritage. There is a need to create a brand – potentially with sub-brands - for the town which encapsulates this valuable mix and projects the attractions of the centre not only to existing local residents but to a wider audience. To back up this branding, there needs to be a coordinated multi-partner marketing and social media strategy – with physical markers (such as branded banners) to underline Sidcup’s sense of identity.

6) **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 issues with cleansing of the pavements and forecourts which need to be tackled –this is a cross cutting theme for all the borough’s towns. Sidcup's public spaces could benefit from more activation of the spaces – for example through music (e.g. good quality buskers), street art and heritage trails. The space fronting the shops could also benefit from enlivening – for example through lively forecourt displays and pavement cafes.

7) **Enhance the Evening and Night Time Economy** - Sidcup’s evening and night time economy have relatively low levels of satisfaction amongst town centres users. It is felt there insufficient diversity of offer to appeal to families and young professionals, and relatively limited choice beyond food and beverage establishments.
Suggested actions

Table 5 presents potential actions which could be followed up by the Council and its partners for each theme that would help Sidcup achieve its vision. The stakeholder engagement process provided a collection of potential town centre ideas and projects which could deliver economic vitality to Sidcup. Note that only actions which are specific to Sidcup are included here. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented. Additional interventions which contribute to common themes and which could be applied in all town centres are summarised in Table 1 in the ‘Common Themes – Suggested actions for all town centres’ chapter.

Table 5 Potential town centre specific actions for Sidcup

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions</th>
<th>Potential Medium Term Action</th>
<th>Potential Long Term Actions</th>
</tr>
</thead>
</table>
| Diversify the retail and leisure offer | - Encourage improved use of shop window displays - for example through competitions, trails or arts projects  
- Increase awareness amongst traders of the potential value of the student population as customers | - Encourage student friendly shopping – look at opening hours and shifts and possible discount schemes  
- Encourage existing businesses to become more family friendly where possible, and encourage new family friendly businesses to locate in Sidcup  
- Develop meanwhile use of empty or underused spaces  
- Develop new library and cinema site | - Develop boutique hotel – spa and wedding venue  
- Develop new venues – e.g. theatre or rehearsal space |
| Foster inward investment | - Review the potential economic impact of students as a positive asset for the town centre  
- Develop inward investment pack to help highlight Sidcup’s unique selling points  
- Develop target list of business to attract to extend the retail and leisure offering  
- Develop master plan for Sidcup Station area | - Develop incentives to attract independent and new businesses  
- Target family friendly providers – e.g. family friendly restaurants and leisure activities | - Implement master plan for Sidcup Station area |
| Support business growth | - Enhance the linkages between businesses and arts colleges  
- Introduce pop-up co-working/start up space/workshop space in vacant units for graduates of the colleges and other local businesses | - Work with performing arts colleges to create linkages with town centre businesses and embed this relationship into the curriculum |
| Events and community engagement | - Develop a coordinated programme of events that showcase Sidcup’s rich cultural and historical offering  
- Expand Sidcup Fringe events | - Develop a market – either regular or specialty  
- Grow Sidcup Fringe into a sub-regional or regional attractor  
- Review options for creating a community events space |
| Place marketing | - Develop a coordinated town centre social media and marketing strategy  
- Improve sense of arrival/place – e.g. banners, signage  
- Develop unique brand for Sidcup | - Use events, such as the Sidcup Fringe Festival to increase the profile of Sidcup  
- Increase the presence of art- e.g. public art, pop up gallery, displays in cafes/restaurants, open studios  
- Develop the quarter concept – Station quarter, etc. |
| Public realm / shop fronts | - Improve visual merchandising – such as through High Street trails  
- Introduce of more outdoor music – e.g. public piano, busking spots  
- Increase community art – e.g. pavement art, community education around architecture | - Develop history and cultural trails  
- Improve lighting, including of buildings |
| Evening and night time economy | - Promote as safe town – challenge perceptions – promote good news stories  
- Undertake preliminary audit of Evening / Night Time and develop action plan | - Target wider NTE providers (e.g. wine/gin bar, look at licencing Al fresco dining, street food, board game Café) for inward investment  
- Expand the range of evening leisure activities, especially non-alcohol based  
- Implement E/NTE improvement action plan |

- Develop potential events space  
- Develop Gallery – potentially around Quentin Blake  
- Advertise Sidcup culture offer to a wider London/Kent audience  
- Develop town square/events space – temporary (agree road closures with TfL) or permanent  
- Develop new venues – e.g. theatre or rehearsal space
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 20.

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
Welling has mixed affluence levels – with large sections of those living near the town centre boundary classified as both ‘Financially Stretched’ and ‘Comfortable Communities’. The age distribution is similar to the Bexley averages. Welling has below the Borough average of Single Parents and Single without Children and also is below the average for percentage of unemployed residents.

Perceptions of Welling
Businesses viewed the following aspects of the town centre as positive: public realm, sense of identity and walking / cycling provision. 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 however 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.xxviii

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 16 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% of 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. 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. 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.

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 change in all categories, except for footfall. While these are positive trends, Welling

\[21 \text{ As many town centre businesses, extend beyond the official town centre boundary, the effective town centre has been expanded to include all additional businesses within 250m of the official town centre boundary. These numbers are based on the businesses recorded by the Office of National in October 2018. The Town Centre Businesses with 1 or 0 employment numbers have been excluded. If they were included, the values are 434 and 2971 respectively.}\]
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 themes for action

Welling vision statement:
Welling will be a place in which the town centre experience including community spirit 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) **Increase 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. Associated with increasing accessibility is improving the quality and safety for pedestrians and cyclists.

2) **Increase the quality and diversity of shops** – Town centre users want increased quality and diversity of the shops. Targeted inward investment can help attract retailers that fill market gaps in vacant units, but largely changes in the retail composition will be driven by landlord decisions and market forces.

3) **Enhance the public realm** – Welling had a public realm improvement programme in 2014. Localised improvements are required in the short-term, particularly with respect to greening the high street and increasing the visual interest (e.g. attractive shop front displays). Longer term a review of the public realm is required, particularly with respect to the creation of a town focal point/events space.

4) **Enhance the 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. Regular events and markets can help bridge the leisure gap, while the offering develops. One element that may have an impact on the evening leisure offering is the sense of safety. This has declined 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 a town centre partnership, but currently no business association exists that brings the businesses together. Building relationships with the business community is a necessary step to understand their needs.
Suggested actions

Table 6 presents potential actions which could be followed up by the Council and its partners for each theme that would help Welling to achieve its vision. The stakeholder engagement process provided a collection of potential town centre ideas and projects which could deliver economic vitality to Welling. Note that only actions which are specific to Welling are included here. These are suggested actions which in many cases are dependent upon securing additional resources before they can be implemented. Additional interventions which contribute to common themes and which could be applied in all town centres are summarised in Table 1 in the ‘Common Themes – Suggested actions for all town centres’ chapter.

Table 6 Potential town centre specific actions for Welling

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Short Term Actions (completed in Year 1)</th>
<th>Potential Medium Term Action (completed in Years 2-3)</th>
<th>Potential Long Term Actions (completed in Years 4+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Accessibility</td>
<td>- Review of parking provision&lt;br&gt;- Promotion of new Quietway and other cycle routes&lt;br&gt;- Undertake a signage and wayfinding audit</td>
<td>- Implement results of parking review – including promotion of existing offer&lt;br&gt;- Consider potential Quietway expansion, improving high quality cycle links with Welling and other Town Centres&lt;br&gt;- Audit the mobility access of the town centre</td>
<td>- Implement on-going accessibility improvements</td>
</tr>
<tr>
<td>Increase the quality and diversity of shops</td>
<td>- Review property ownership and business composition&lt;br&gt;- Improve linkages with landlords and commercial agents</td>
<td>- Develop inward investment prospectus and target preferred sectors/retailers</td>
<td>- Promote Welling to target sectors/retailers</td>
</tr>
<tr>
<td>Enhance Public Realm</td>
<td>- Concept development for improved public realm in Welling - (e.g. planting, decluttering, creation of new public spaces)&lt;br&gt;- Public art/alley naming project</td>
<td>- Implement of quick wins from agreed concept design for public realm</td>
<td>- Implement longer term public realm improvements, including for a new town focal point/public square</td>
</tr>
<tr>
<td>Increase the leisure offering</td>
<td>- Inward investment study and produce a prospectus to attract new leisure occupiers</td>
<td>- Engage with landlords around pop-up leisure/retail uses for empty units&lt;br&gt;- Explore options for locally provided events and markets</td>
<td>- Establish regular markets (if feasible)</td>
</tr>
<tr>
<td>Support Business</td>
<td>- Engage with business community with a view to building capacity</td>
<td>- Implement shop front improvement programme&lt;br&gt;- Develop a sustainable business association</td>
<td>- Investigate feasibility of introducing a BID</td>
</tr>
</tbody>
</table>
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. This chapter will look at the following:

- What the Council can do within its own organisation
- Why other key stakeholders need to step up
- How 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. This is because the Council is able to coordinate and arbitrate between partners, maintain a unique overview of town centres and make appropriate connections - bringing people together to achieve common aims.

In order to successfully deliver the strategy the Council will need to use all of its relevant departments to lever in change. Based on the model set out in Figure 4, the various Council sections can effect positive change to deliver the visions for Bexley’s town centres in the following ways:

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 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 step up

The successful delivery of the Strategy will require the active participation of a range of town centre stakeholders – a number of which have already been consulted during the development of this Strategy. Many of the benefits of the Strategy will accrue to these stakeholders – especially businesses, developers and landlords. These will be derived from improved town centre performance – for example increased profitability, property values and rental yields.

A key element of implementation therefore is to influence and convince key stakeholders to invest money and resource in support of the identified actions. This could be achieved through creating a collective working group, including both public and private sector actors who will choose and 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 will have a clearly defined reason for being involved and the benefits the Strategy will bring to their organisation. It is expected that each member of the group will contribute to help deliver these prioritised actions, both through financial and/or in-kind means proportional to the respective benefits to their organisations.

It is imperative that all partners see a return on investment, all agreed significant actions need to be rigorously scrutinised to ensure they deliver the right outcomes for all stakeholders.

The delivery and review process for the Town Centres Strategy

A schematic representation of the stages involved in delivery and ongoing review of the Strategy is shown in Figure 17. The initial meetings with town centre stakeholders will be focussed on aligning the Strategy to the priorities of the various stakeholders and collectively agreeing the priority actions for the Strategy. At this first stage of delivery (during first 3 months after adoption) the Council - working with partner organisations - would also look to deliver some high priority quick wins that are deliverable within existing resources.

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 both 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 second stage of delivery (during the first 12 months).

As emphasised above, this Strategy can only deliver tangible benefits if the Council can work in partnership with a range of local and regional stakeholders – including commercial businesses. The reality of the situation with regards to Council budgets is that there is very little financial headroom for launching new initiatives or programmes. The Council’s Town Centres team – which will lead on the delivery of the Strategy – comprises three posts, with no funding and the role includes an ongoing remit to monitor and support the Bexleyheath and Sidcup BIDs. These 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.

In each of the stages of delivery it is necessary to review progress, monitor delivery and re-prioritise the actions in the Strategy. Medium and longer term projects – contingent on the successful securing of additional funding – would be scheduled during stages 3 and 4 – i.e. from year 2 onwards. In the 4th year of the strategy timeline there would be a full review and refresh of the overall Town Centre Strategy to set the course of action over the subsequent five years.
London Borough of Bexley
Town Centres Strategy (Draft)

Figure 17 Strategy Delivery Stages

Stage 1: Months 1-3
- Convene key stakeholder working groups
- Collectively agree prioritised actions and commit resources
- Plan and prepare to deliver priority quick wins / pilots

Stage 2: Months 3-12
- Deliver quick wins and pilot projects
- Undertake feasibility studies
- Apply for additional funding
- Periodic review of progress

Stage 3: Years 2-3
- Deliver Medium term projects
- Periodic review and reprioritisation
- Apply for additional funding
- Prepare for larger longer term projects

Stage 4: Years 4+
- Deliver Longer term projects
- Review and refresh the Strategy
Funding

This strategy does not try and set out full details and funding requirements for every identified action. Development of the details and identifying the source(s) of funding is a key next step.

As discussed above, significant resources will be required in order to deliver the full strategy. The Council and key partners can 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 are able to 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 across London. Current funding opportunities include the Good Growth Fund, Liveable Neighbourhoods and Healthy Streets;
- TfL – TfL is another major source of funding and is currently funding a large portion Bexley’s on-going regeneration and transport improvements;
- 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 through Growth Deals with Local Enterprise Partnerships. These pots of money are usually devolved to and managed by the GLA in the Greater London context. 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 a number of 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 and Section 106 agreements).
- 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 and effectiveness of the Strategy will be monitored in a number of 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. This ongoing monitoring programme will help to track the progress of town centres against the overall Strategy objective which is to improve the vibrancy, competitiveness and economic vitality of Bexley’s Town Centres.

Each programme or project which is commissioned as a result of the Strategy will also have an element of evaluation built into the project plan. Key Performance Indicators will be devised for each project which 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.
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. Primary data collected and stakeholder engagement workshops are detailed below.

- 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.

<table>
<thead>
<tr>
<th>Town Centre</th>
<th>Survey respondents</th>
<th>Residents responses as percentage of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bexleyheath</td>
<td>211</td>
<td>48%</td>
</tr>
<tr>
<td>Erith</td>
<td>63</td>
<td>48%</td>
</tr>
<tr>
<td>Sidcup</td>
<td>42</td>
<td>55%</td>
</tr>
<tr>
<td>Crayford</td>
<td>37</td>
<td>32%</td>
</tr>
<tr>
<td>Welling</td>
<td>39</td>
<td>72%</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Town Centre</th>
<th>Number of Responses Received</th>
<th>Number of Businesses recorded in Bexleyheath Shopfront Surveys(^2)</th>
<th>Percentage complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bexleyheath</td>
<td>27</td>
<td>227</td>
<td>12%</td>
</tr>
<tr>
<td>Crayford</td>
<td>8</td>
<td>43</td>
<td>19%</td>
</tr>
<tr>
<td>Erith</td>
<td>10</td>
<td>88</td>
<td>11%</td>
</tr>
<tr>
<td>Sidcup</td>
<td>10</td>
<td>256</td>
<td>4%</td>
</tr>
<tr>
<td>Welling</td>
<td>18</td>
<td>242</td>
<td>7%</td>
</tr>
<tr>
<td>Total</td>
<td>73</td>
<td>856</td>
<td>9%</td>
</tr>
</tbody>
</table>

**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 19. Full details of the survey can be requested from Sidcup Partners.

\(^2\) 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.
Saturday Town Centre audits

On Saturday the 2\textsuperscript{nd} and Saturday 16\textsuperscript{th} 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 3\textsuperscript{rd}, 5\textsuperscript{th} and 9\textsuperscript{th}. 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. Images of the outputs of these sessions are shown in Figure 20 to Figure 30.
Figure 20 Staff feedback collection

Figure 21 Bexleyheath Favourite Things

Figure 22 Bexleyheath suggestions for improvement
Figure 23 Crayford favourite things

Figure 24 Crayford suggestions for improvement

Figure 25 Erith favourite things

Figure 26 Erith suggestions for improvement
Appendix B – Statistical Evidence Base

Bexleyheath statistical information

Figure 31 Acorn Classification of Bexleyheath Town Centre
Figure 32 Acorn Demographic Data for Bexleyheath Ward (2018)

Figure 33 Three words describing Bexleyheath by day
Figure 34 Three words describing Bexleyheath by night

Figure 35 Perceptions about Bexleyheath

Figure 36 Changing perceptions of Bexleyheath residents

Figure 37 Business performance and satisfaction in Bexleyheath

Note: Businesses were not asked about whether events attracted them to the Town Centres.
Figure 38 Footfall trends Bexleyheath

Source: Footfall data 03 August 2018, from Bexleyheath BID

Figure 39 Bexleyheath Vacancy Rates

Figure 40 Identification by businesses of their barriers to growth (Bexleyheath)
Figure 41 Self-predicted future business performance (Bexleyheath)

- Significant positive change
- Small positive change
- No change
- Small negative change
- Significant negative change

Figure 42 Satisfaction of town centre users with Bexleyheath's offering

- Food shops
- Evening leisure (e.g., bars, pubs, clubs)
- Other retail (e.g., clothing, electronics, books)
- Personal services (e.g., salon, travel, bank)
- Restaurants, cafes, and takeaways

Figure 43 Opinions on the composition of Bexleyheath town centre

- Foot shops
- Other retail
- Personal services
- Restaurants
- Culture and leisure
- Evening leisure

- Good
- Too much
- Not enough or offer not diverse
- Low quality
- Not affordable

Figure 44 Modes of transport used to reach Bexleyheath

- Car
- Public Transport - Bus/Train
- Cycling
- Walking
- Other (please specify)
Sidcup statistical information

Figure 45 Sidcup Town Centre Businesses and Acorn Category

Figure 46 Acorn Demographic Data for Sidcup Ward (2018)
Figure 47 Three words describing Sidcup by day

Figure 48 Three words describing Sidcup by night

Figure 49 Favourite things in Sidcup

<table>
<thead>
<tr>
<th>Favourite things</th>
<th>Mention in percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants/shops</td>
<td>35%</td>
</tr>
<tr>
<td>Transport/Accessibility</td>
<td>28%</td>
</tr>
<tr>
<td>Character</td>
<td>25%</td>
</tr>
<tr>
<td>Green spaces</td>
<td>18%</td>
</tr>
<tr>
<td>Safety</td>
<td>10%</td>
</tr>
<tr>
<td>Nothing</td>
<td>5%</td>
</tr>
<tr>
<td>Public realm (Cleanliness)</td>
<td>5%</td>
</tr>
<tr>
<td>Library</td>
<td>3%</td>
</tr>
<tr>
<td>Cultural activities (performances)</td>
<td>3%</td>
</tr>
</tbody>
</table>

Figure 50 Perceptions about Sidcup
Figure 51 Change in perceptions between 2013 and 2018

Figure 52 Change in trading in comparison with the previous year

Figure 53 Average weekly footfall in Sidcup

Figure 54 Sidcup vacancy rate
Figure 55 Sidcup barriers to business

- Lack of customers for your services/products
- Cost of complying with regulations
- Strong competition from other businesses
- Premises too small or unsuitable
- High cost of overheads including rent and rates
- Town Centre area not attractive to customers
- High cost of raw materials, goods and services
- High staff costs
- Loss of business to online competitors
- Other (please specify)

Figure 56 Satisfaction with Sidcup’s offering

- 2018 (LBB Survey)
- 2013 (Regeneris)

Figure 57 Satisfaction with the mix of types of business, shops and services in Sidcup?

- Good
- Too much
- Not enough or offer not diverse
- Low quality
- Not affordable
Figure 58 Digital engagement of Sidcup Town Centre users

Figure 59 Modes of transport used to reach Sidcup

Figure 60 Suggestions for improvements from town centre users and businesses

<table>
<thead>
<tr>
<th>Area for improvement</th>
<th>Percentage of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance the shops/retail offering</td>
<td>31%</td>
</tr>
<tr>
<td>Improving traffic and parking</td>
<td>31%</td>
</tr>
<tr>
<td>Enhance the shops/retail offering</td>
<td>31%</td>
</tr>
<tr>
<td>Improving traffic and parking</td>
<td>31%</td>
</tr>
<tr>
<td>Increased leisure offering</td>
<td>17%</td>
</tr>
<tr>
<td>Public realm improvement</td>
<td>14%</td>
</tr>
<tr>
<td>Regeneration</td>
<td>10%</td>
</tr>
<tr>
<td>Improve quality and diversity of the restaurants/cafes/bars</td>
<td>10%</td>
</tr>
<tr>
<td>Improve the Night Time Economy</td>
<td>7%</td>
</tr>
<tr>
<td>Unsure/Nothing</td>
<td>7%</td>
</tr>
<tr>
<td>Improve Cultural Offering (theatre)</td>
<td>5%</td>
</tr>
<tr>
<td>Improved safety</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>
Erith statistical information

Figure 61 Erith Town Centre Businesses and Acorn Category

Figure 62 Acorn Demographic Data for Erith Ward (2018)

Figure 63 Three words describing Erith by day
Figure 64 Three words describing Erith by night

Figure 65 Favourite things in Erith

<table>
<thead>
<tr>
<th>Favourite Thing</th>
<th>Mention in percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>River</td>
<td>43%</td>
</tr>
<tr>
<td>Shops</td>
<td>27%</td>
</tr>
<tr>
<td>Morrison’s</td>
<td>22%</td>
</tr>
<tr>
<td>Parking/access</td>
<td>17%</td>
</tr>
<tr>
<td>Community</td>
<td>8%</td>
</tr>
<tr>
<td>Nothing</td>
<td>8%</td>
</tr>
<tr>
<td>Leisure</td>
<td>8%</td>
</tr>
<tr>
<td>Matalan</td>
<td>8%</td>
</tr>
<tr>
<td>Costa</td>
<td>7%</td>
</tr>
<tr>
<td>Wilko</td>
<td>7%</td>
</tr>
<tr>
<td>Public realm</td>
<td>5%</td>
</tr>
<tr>
<td>Library</td>
<td>3%</td>
</tr>
<tr>
<td>Cafes/Restaurants/Bars</td>
<td>3%</td>
</tr>
<tr>
<td>Events</td>
<td>2%</td>
</tr>
<tr>
<td>Heritage</td>
<td>2%</td>
</tr>
<tr>
<td>Transport</td>
<td>0%</td>
</tr>
</tbody>
</table>
Figure 66 Perceptions of Erith

Figure 67 Changing town centre perceptions (Erith)
Figure 68 Business performance - comparing 2013 and 2018

- Employment Numbers
- Footfall in business
- Business turnover
- Business profit

Reported Positive Change (2018)
Reported Negative Change (2018)
Reported Positive Change (2013)
Reported Negative Change (2013)

Figure 69 Average footfall in Erith Town Centre (LBB Bi-annual footfall counts)

Figure 70 Erith Vacancy Rates

- Core vacancy %
- Non-core vacancy %
- Overall Town Centre Vacancy Rate
Figure 71: Reported barriers to business growth (Erith)

- High cost of overheads including rent and rates
- Lack of customers for your services/products
- Strong competition from other businesses
- Town Centre area not attractive to customers
- High cost of raw materials, goods and services
- High staff costs
- Other (please specify)
- Cost of complying with regulations
- Loss of business to online competitors

Figure 72: Views on Erith’s offering

- Food shops: 4.0
- Other retail (comparison): 2.0
- Personal services: 0.0
- Restaurants, cafes, and takeaway: 3.0
- Evening leisure: 0.0

Figure 73: Further views on Erith’s offering

- Town Centre Users 2018
- Town Centre Users 2013
Figure 74 Business Digital Engagement

- Current website: 60%
- Self-account managed online: 50%
- Click and collect online: 40%
- Online marketing strategy: 30%
- On Facebook: 20%
- On Twitter: 15%
- On Google marketplace: 10%
- Social media strategy: 5%

Yes: 80%
No: 20%
No, but planning to within next 6 months: 10%

Figure 75 Digital engagement of Erith’s town centre users

- Website: 60%
- Facebook: 50%
- Twitter: 40%
- Instagram: 30%
- Google marketplace: 20%
- SnapChat: 10%

Yes: 70%
No: 30%

Figure 76 Modal share for accessing Erith town centre

- Car: 90%
- Public transport - Bus/Train: 5%
- Cycling: 3%
- Walking: 2%
- Other (please specify): 0%

- All responses
- Town Centre Residents
- Town Centre Visitors

Figure 77 Suggestions for improvements

<table>
<thead>
<tr>
<th>Area for improvement</th>
<th>Percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shops</td>
<td>30%</td>
</tr>
<tr>
<td>Public realm</td>
<td>28%</td>
</tr>
<tr>
<td>Enhance riverside</td>
<td>20%</td>
</tr>
<tr>
<td>Regeneration</td>
<td>20%</td>
</tr>
<tr>
<td>Leisure</td>
<td>18%</td>
</tr>
<tr>
<td>Restaurants/Cafes/Cars</td>
<td>18%</td>
</tr>
<tr>
<td>Traffic/roads</td>
<td>10%</td>
</tr>
<tr>
<td>Markets</td>
<td>10%</td>
</tr>
<tr>
<td>Safety</td>
<td>8%</td>
</tr>
<tr>
<td>NTE</td>
<td>5%</td>
</tr>
<tr>
<td>Nothing</td>
<td>2%</td>
</tr>
</tbody>
</table>
Crayford statistical information

Figure 78 Crayford Town Centre Businesses and Acorn Category

Figure 79 Acorn Demographic Data for Crayford Ward (2018)

Figure 80 Three words to describe Crayford by day
Figure 81 Three words to describe Crayford by night

Figure 82 Favourite things in Crayford

<table>
<thead>
<tr>
<th>Favourite Thing</th>
<th>Mention in percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shops (including specific mentions)</td>
<td>66%</td>
</tr>
<tr>
<td>Sainsbury's</td>
<td>28%</td>
</tr>
<tr>
<td>Access</td>
<td>22%</td>
</tr>
<tr>
<td>Restaurants and cafes</td>
<td>19%</td>
</tr>
<tr>
<td>Atmosphere</td>
<td>9%</td>
</tr>
<tr>
<td>River and Riverside Gardens</td>
<td>9%</td>
</tr>
<tr>
<td>Public realm (improving)</td>
<td>9%</td>
</tr>
<tr>
<td>Services</td>
<td>6%</td>
</tr>
<tr>
<td>Sense of safety</td>
<td>3%</td>
</tr>
</tbody>
</table>

Figure 83 Perceptions of town centre users, residents and businesses

- Attractive place
- Comprehensive offer
- Sense of safety
- Public Realm
- Signage
- Sense of identity
- Parking
- Walking and cycling
- Level of Noise
- Quantity of events and markets
- Attractiveness of events and markets
- Town Centre Businesses
- Town Centre (All Respondents)
Figure 84 Changing perceptions of town centre users

Figure 85 Change in business performance over preceding three years (self-reported)

Figure 86 Crayford Average Weekly Footfall

Figure 87 Crayford vacancy rate
Figure 88 Crayford barriers to business
- High cost of overheads including rent and rates
- Lack of customers for your services/products
- Strong competition from other businesses
- Town Centre area not attractive to customers
- High cost of raw materials, goods and services
- High staff costs
- Other (please specify)
- Cost of complying with regulations
- Loss of business to online competitors

Figure 89 Views on Crayford’s offering
- Food shops: 4.00
- Other retail (e.g. clothing, electronics, books): 2.00
- Personal services (e.g. salon, travel, bank): 1.00
- Culture and recreation (e.g. cinema, gym): -
- Restaurants, cafes, and takeaways: 3.00
- Evening leisure (e.g. bars, pubs, clubs): 2.00

Figure 90 Further views on Crayford’s offering
- Good
- Too much
- Not enough or offer not diverse
- Low quality
- Not affordable
Figure 91 Business digital engagement levels

Figure 92 Town centre users engagement with businesses

Figure 93 Modal share for accessing Crayford town centre

Figure 94 Suggestions for improvement

<table>
<thead>
<tr>
<th>Area for improvement</th>
<th>Percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Traffic</td>
<td>50%</td>
</tr>
<tr>
<td>Shops/restaurants</td>
<td>18%</td>
</tr>
<tr>
<td>Public realm</td>
<td>18%</td>
</tr>
<tr>
<td>Events</td>
<td>10%</td>
</tr>
<tr>
<td>Personal Services (Bank)</td>
<td>8%</td>
</tr>
<tr>
<td>Improving pedestrian and cycling conditions</td>
<td>8%</td>
</tr>
<tr>
<td>Parking</td>
<td>8%</td>
</tr>
<tr>
<td>Improve safety/reduce ASB</td>
<td>5%</td>
</tr>
</tbody>
</table>
Welling statistical information
Figure 95 Welling Acorn Demographics

Figure 96 Acorn classification data

Figure 97 Three words to describe Welling by night
Three words to describe Welling by night

Shops (Including supermarkets) 53%
Accessibility 33%
Services 28%
Tesco’s 25%
Restaurants 14%
Morrison’s 11%
Danson Park 11%
Nothing 8%
Pubs/Bars 8%
Community/Character 6%

Welling Favourite Things

Attractive place
Comprehensive offer
Sense of safety
Public Realm
Signage
Level of Noise
Walking and cycling
Parking
Sense of identity
Special events
Special events and markets
(Atractiveness)

Perceptions of Welling

Change in perceptions between 2013 and 2018

Town Centre Users (2018)
Town Centre Businesses

London Borough of Bexley
Town Centres Strategy (Draft)
Figure 102 Town Centre Business Performance over previous three years

Figure 103 Average Welling Footfall Data

Figure 104 Historical vacancy rate trends in Welling
Figure 105 Barriers to business growth

- High cost of overheads including rent and rates
- Town Centre area not attractive to customers
- Lack of customers for your services/products
- Strong competition from other businesses
- Town centre are not accessible to customers
- Cost of complying with regulations
- High cost of raw materials, goods and services
- High staff costs
- Parking
- Loss of business to online competitors
- Premises too small or unsuitable

Figure 106 Satisfaction with Welling’s Offering

- Food shops
- Other retail (e.g. clothing, electronics…)
- Personal services (e.g. salon, travel…)
- Restaurants, cafes, and take aways
- Culture and recreation (e.g. cinema, gym)
- Evening leisure (e.g. bars, pubs, clubs)

2018 vs 2013

Figure 107 Satisfaction with Welling’s offering (2)

- 80%
- 70%
- 60%
- 50%
- 40%
- 30%
- 20%
- 10%
- 0%
- Food shops
- Other retail
- Business services
- Personal services
- Restaurants
- Culture and recreation
- Evening leisure

- Good
- Too much
- Not enough or offer not diverse
- Low quality
- Not affordable
Figure 108 Town centre user engagement with Welling Town Centre

- Website
- Facebook
- Twitter
- Instagram
- Google Marketplace
- SnapChat

- Yes
- No

Figure 109 Welling businesses digital presence

- Current website
- Sell products/services online
- Click-and-collect service
- Online marketing strategy
- Social media presence
- On Facebook
- On Twitter
- On Instagram
- On Google Marketplace
- Social media strategy
Figure 110 Transport modal share - Welling

Figure 111 Suggestions for improvement from town centre residents and businesses

<table>
<thead>
<tr>
<th>Area for improvement</th>
<th>Percentage of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking (More and free/reduced cost)</td>
<td>35%</td>
</tr>
<tr>
<td>Increase quantity/diversity of shops</td>
<td>22%</td>
</tr>
<tr>
<td>Public Realm (primarily greening)</td>
<td>20%</td>
</tr>
<tr>
<td>Increased leisure offering</td>
<td>16%</td>
</tr>
<tr>
<td>Events and markets</td>
<td>16%</td>
</tr>
<tr>
<td>Safety and ASB reduction</td>
<td>14%</td>
</tr>
<tr>
<td>Transport (Traffic management)</td>
<td>12%</td>
</tr>
<tr>
<td>More restaurants and pubs</td>
<td>10%</td>
</tr>
<tr>
<td>Improve low quality shops/services</td>
<td>8%</td>
</tr>
<tr>
<td>Business support</td>
<td>8%</td>
</tr>
<tr>
<td>Regeneration</td>
<td>6%</td>
</tr>
</tbody>
</table>
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