London Borough of Lewisham

Lewisham Retail Capacity Study 2017

Volume 1 — Main Report

Final Report

October 2017

Lewisham

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For and on behalf of GVA Grimley Ltd

1 INTRODUCTION

1.1 GVA has been instructed by the London Borough of Lewisham to undertake the Lewisham Retail Capacity Study 2017. The study provides the Council with an up-to-date assessment of the 'need' for additional retail floorspace in the Borough over the period of the Council's new Local Plan, to 2033. It also provides an assessment of the performance of its two 'major town centres' of Lewisham and Catford, and network of seven 'district centres'.

1.2 The outputs of the study provide the Council with a clear strategy for the network of centres to ensure that they remain attractive and vibrant over the course of the Plan period, and fully able to meet the needs of local residents for shopping, leisure and services. Our study provides a robust evidence base which is fully compliant with the National Planning Policy Framework (NPPF), which the Council will be able to use to inform policy development and land use allocations, and to assist in the determination of planning applications for new retail development in the Borough.

1.3 Our study has been informed by on-site and desk-based information-gathering, including site visits to each of the 'major town' and 'district town' centres in the Borough. Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across the Borough, and adjacent surrounding areas in which residents may look towards facilities in the Borough to meet their shopping and leisure needs ('the study area'). The results of the survey can also be used to understand the extent to which centres surrounding the Borough – such as Bromley, Croydon and Bluewater – are competing for spending with the network of centres within the Borough.

1.4 The extent of the household telephone survey area was agreed with the Council at the initial stage of preparation of this study, and reflects that which was used in the Council's previous retail capacity evidence base study (Lewisham Retail Capacity Study, Nathaniel Lichfield & Partners, 2009, and Addendum Report, 2010). A plan of the survey area is provided at Plan I of Volume 2 (and is also set out at Figure 7.1 of this report).

1.5 Our report is split into five volumes. This report forms Volume 1 to the study; Volume 2 sets out supporting plans and appendices; Volume 3 provides the household telephone survey data (prepared by NEMS Market Research); Volume 4 sets out results of in-centre surveys undertaken in Lewisham and Catford town centres (also prepared by NEMS Market Research), and Volume 5 sets out the findings of pedestrian footfall counts undertaken in Lewisham and Catford town centres by Pedestrian Market Research Services (PMRS).

1.6 The remainder of this report (Volume 1) is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and leisure planning;
- **Section 3** considers national trends in the retail sector, and in particular the implications of recent economic growth and technological advances which are impacting on shopping habits;
- **Section 4** considers the wider study context, identifying the most popular shopping destinations for residents in the study area, the key competing centres surrounding the study area, and the extent to which they influence the shopping patterns of residents;
- **Section 5** reviews the composition, role and function of current shopping provision in the major town centres through 'health check' assessments;
- **Section 6** reviews the composition, role and function of current shopping provision in the district centres through 'health check' assessments;
- **Section 7** sets out our approach to calculating retail capacity, including definition of the household telephone survey area and approach, discussion of shopping patterns and forecasts of population and expenditure growth;
- **Section 8** sets out the quantitative 'need' for additional comparison (non-food) retail floorspace in the Borough over the study period to 2033;
- **Section 9** sets out the quantitative 'need' for additional convenience (food) retail floorspace in the Borough over the study period to 2033;
- **Section 10** sets out our review of commercial leisure provision within and outside the Borough, and draws conclusions on the quantitative and qualitative need for additional commercial leisure facilities; and
- **Section 11** draws our analysis together and set out conclusions, strategic guidance and recommendations on future change and growth in the Borough's network of centres.

Key terms

1.7 Our 'health check' assessments of the Borough's network of centres, and our subsequent analysis of retail need and strategic recommendations refer to different types of retail and commercial leisure floorspace, as follows:

'Convenience' goods refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on;

'Comparison' goods refers to non-food shopping – including fashion, home furnishings, 1electrical items, DIY goods, books and music;

'Services' uses refers to commercial leisure services such as restaurants and cafes, as well as retail services such as hairdressers, beauty salons, banks, building societies and estate agents. Non-retail uses such as cinemas and arts centres are not included in Experian Goad's analysis, but are accounted for qualitatively through our own analysis.

2 PLANNING POLICY CONTEXT

2.1 In this section we summarise the key features of national and local planning policy guidance which provide the context and framework for this study.

NATIONAL POLICY CONTEXT

National Planning Policy Framework (NPPF) (2012)

2.2 The National Planning Policy Framework (NPPF), published in March 2012, sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.

2.3 The NPPF recognises that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.6 Consistent with transitional arrangements, the Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:

- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
- Justified i.e. the most appropriate strategy, when considered against the alternatives;
- Effective i.e. deliverable over its plan period and based on effective joint working; and
- Consistent with national policy i.e. enable the delivery of sustainable development.

2.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

Planning Practice Guidance (2014)

2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched the online Planning Practice Guidance (PPG) which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

REGIONAL POLICY CONTEXT

London Plan (Consolidated with alterations since 2011) (2016)

2.9 On 10th March 2016, the Mayor adopted the London Plan (consolidated with alterations since 2011). This consolidated plan is now operative as formal alterations to the London Plan and forms part of the development plan for Greater London. It is a strategic spatial planning document setting the London-wide context within which individual London Boroughs must set their local planning policies.

2.10 The London Plan identifies a network of town centres across five categories; International, Metropolitan, Major, District and Local and Neighbourhood. Within the Borough, Lewisham and Catford are defined as 'Major Town Centres', and Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross/New Cross Gate and Sydenham are defined as 'District Centres'. The definitions are set out in Annex 2 of the London Plan:

- **Major Centres** – typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000 sq.m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.
- **District Centres** – distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq.m of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions.

2.11 Policy 2.15 of the London Plan seeks to co-ordinate development within the network of town centres to ensure that they provide the main foci for commercial development; the structure for sustaining and improving a competitive choice of goods and services which are conveniently accessible; and the main foci for Londoners' sense of place and local identity. The policy states that any identified deficiencies in the network of town centres can be addressed by promoting centres to function at a higher level in the hierarchy or by designating new centres where necessary, giving particular priority to areas with particular needs for regeneration and better access to services, facilities and employment.

2.12 Lewisham, Catford and New Cross, as well as Deptford Creekside, are all identified as 'opportunity areas' in the London Plan. These opportunity areas are London's principal concentrations of brownfield land which are considered to have capacity to accommodate new housing, commercial and other development linked to existing or potential improvements to public transport accessibility. Typically they can accommodate at least 5,000 jobs or 2,500 new homes or a combination of the two, along with other supporting facilities and infrastructure. The London Plan also identifies scope for further intensification in central Lewisham, where strategically important regeneration is already underway, as we discuss below.

LOCAL POLICY CONTEXT

Lewisham Core Strategy (June 2011)

2.13 The Core Strategy is the principle document in the Lewisham Local Plan. It sets out a long-term vision, spatial strategy and core policies for shaping the Borough's development up to 2026. The Core Strategy forms part of the development plan for the Borough, together with the Site Allocations Local Plan, the Lewisham Town Centre Local Plan, the Development Management Local Plan, and the London Plan.

2.14 In accordance with Spatial Policy 2 of the Core Strategy, Regeneration and 'Growth Areas' will provide key regeneration and development opportunities focused on the areas of Lewisham, Catford, Deptford, Deptford Creekside and New Cross/New Cross Gate, capitalising on public transport accessibility and the availability of deliverable and developable land, particularly through intensification of land uses in town centres and within mixed use employment locations. The regeneration and growth areas will support the creation of a more sustainable Borough, including at least 62,000 sq.m of new retail floorspace by 2026.

2.15 The Core Strategy (Policy 6) identifies a hierarchy of centres for Lewisham, as summarised below:

Major Town Centre: Lewisham, Catford;

District Centres: Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross/ New Cross Gate, Sydenham;

Neighbourhood Local Centres: Brockley Cross, Crofton Park, Downham Way, Grove Park and Lewisham Way;

Local parades: over 80 local shopping parades across the Borough.

2.16 This policy supports the Government's key objective for planning in town centres by promoting the vitality and viability of Lewisham's town centres, by planning for the growth of existing centres, and by promoting and enhancing existing centres.

2.17 Lewisham town centre is an important commercial centre in the Borough. The Council has an aspiration for Lewisham to achieve metropolitan town centre status through its potential for increased retail capacity and the provision of new housing, along with public realm and environmental improvements. In accordance with Spatial Policy 2 of the Core Strategy, the town centre will accommodate up to 40,000 sq.m of additional retail floorspace (convenience and comparison) and 4,300 sq.m of additional leisure floorspace by 2026. It should be noted that the figures identified in this policy have been superseded by further updates to the Borough's retail capacity forecasts, and these are reflected in the Lewisham Town Centre Local Plan, discussed separately below.

2.18 Catford is the Borough's second largest town centre. The Council has an aspiration to see significant improvement to the physical environment, working with commercial investors and developers to bring about comprehensive redevelopment of the area. In accordance with Spatial Policy 2, the town centre will accommodate up to 22,000 sq.m of additional retail floorspace (convenience and comparison) by 2026.

2.19 Deptford and New Cross/New Cross Gate are identified in the Core Strategy as being the most deprived locations in the Borough and the town centres provide an important focus for local communities. The Core Strategy states that the scale of change to facilitate local regeneration will be most pronounced within this part of the Borough and has the potential for long term physical and socio-economic benefits. In accordance with Spatial Policy 2 of the Core Strategy, this network of centres will be the location for major new retail and leisure development.

2.20 In accordance with Spatial Policy 3, 'District Hubs' will be reinforced as places which will sustain a diversity of uses and activities appropriate to each hub's function and location. Blackheath, Forest Hill, Lee Green and Sydenham are designated as 'District Centres' in the retail hierarchy and serve as anchors for the 'District Hubs'. New retail, leisure and other town centre uses and facilities will be focussed in these town centres. In terms of the District Centres:

- As Blackheath has no identified sites for redevelopment, the Council will ensure the preservation / enhancement of the centre's historic character and significance.
- The Council will support the redevelopment of underused sites in Forest Hill.
- In Lee Green, the Council will seek to improve civic space and facilitate a more intensive mixed use development on the shopping centre site to strengthen its role and function, as well as look to improve the connectivity between the shopping centre and the Sainsbury's store. A planning application for the redevelopment of the shopping centre has been submitted and we discuss this later in the report.
- In Sydenham, the council will support the physical and environmental improvements to Sydenham High Street.

2.21 The Council will facilitate growth within the District centres, to reduce the need for residents to shop outside the borough.

2.22 'Local Hubs' are specific locations of varying character which, while not having the status of the District Centres, present various opportunities for change. In accordance with Spatial Policy 4, development sites will be capitalised to secure physical and environmental improvements and integration with the surrounding neighbourhoods including local shopping parades. Local Hubs include Brockley Cross, Hither Green and Bell Green. We are aware that, subsequent to publication of the Core Strategy, major retail-led development has taken place at Bell Green.

2.23 In accordance with Core Strategy Policy 6 (Retail hierarchy and location of retail development), the Council will expect major retail development, leisure and related town centre uses, including arts, cultural and entertainment facilities, to be located within the Major Town and District centres. Uses located outside of these areas will be assessed against the sequential test. The Council will designate primary and secondary frontages within the Major Town and District centres in order to ensure essential services are maintained and contribute to their vitality and viability. Local shopping facilities will be protected from change of use or redevelopment where there is an economic demand for such services.

Lewisham Development Management Local Plan (2014)

2.24 The Development Management Local Plan (DMLP) contains the detailed policies that planning applications are assessed against and forms part of the Lewisham Local Plan. The DMLP provides the policies needed to manage the appropriate delivery of high quality development across the Borough. These policies ensure that development contributes to the wider, strategic aims of the Core Strategy, providing further detail when necessary in order to deliver the long-term spatial vision for the Borough.

2.25 Policy DM1 sets out a clear presumption in favour of sustainable development as required by the NPPF and establishes how it will be applied when considering development proposals against other Development Management policies on specific issues and those in the Local Plan as a whole.

2.26 In accordance with Policy DM13 (Location of Main Town Centre Uses), the Council will encourage main town centre uses within the Major Town and District centres. This policy provides additional detail to support Core Strategy Policy CSP6 (Retail Hierarchy and Location of Retail Development, as discussed above), which sets out the Borough's town centre hierarchy and location of retail development.

2.27 Policy DM14 (District Centre Shopping Frontages) seeks to protect shops (A1 Use Class) and therefore the primary retail function of the district centres. Similarly, the aim of Policy DM15 (Neighbourhood and Local Centres) is to retain shops (A1 Use Class) in order to protect the existing neighbourhood local centres and ensure the on-going provision of an adequate range of shops that meet daily needs of the local community.

2.28 The Council acknowledges the important role that food and drink shops play in contributing to the vibrancy and vitality of town centres, particularly to the night time economy. However, it is also acknowledged that these uses can create negative impacts for nearby residents. Where new food and drink premises are established, and in accordance with Policy DM17 (Restaurants and Cafes (A3 uses) and Drinking Establishments (A4 uses)), the Council will seek to control and minimise these impacts.

2.29 In accordance with Policy DM18 (Hot Food Take-Away Shops (A5 uses)), the Council will seek to prevent the establishment of new hot food take-away shops in close proximity to primary and secondary schools. In areas further away from schools, the policy will seek to limit the number of hot food take-away shops. More specifically, the Council will not grant planning permission for new hot-food take-away shops that fall within 400 meters of the boundary of a primary or secondary school. The aim of the policy is to reduce the negative health impacts of hot food take-away shops whilst also managing potential environmental impacts.

Lewisham Town Centre Local Plan (LTCLP) (2014)

2.30 As noted above, the Core Strategy aims to ensure that by 2026 Lewisham town centre achieves Metropolitan status in the London-wide retail hierarchy, by accommodating up to 40,000 sq.m of additional retail space, improved leisure space and 2,500 additional homes. This aspiration subsequently provides the focus of the vision for the LTCLP, which aims to deliver and implement the strategy outlined in the Core Strategy. The LTCLP supersedes the saved UDP proposals that apply to the Lewisham town centre and all other adopted guidance, including the Lewisham Gateway Planning Brief (2002). Policy LTCP1 (Figure 2.1, adjacent), identifies the plan area and town centre boundaries, and also shows alongside those parts of the town centre that are considered edge of centre.

2.31 Having regard to factors such as architecture, townscape features and retail influence, there are distinct sub-areas within the town centre. These sub-areas have diverse characters and each present different opportunities to enhance the social, environmental and economic health of the town centre. These sub-areas have been labelled ‘Policy Areas’ in the LTCLP. Figure 2.2 shows the six Policy Areas in the context of the plan boundary.

2.32 The majority of Policy Areas have been defined to assist in the intensification of those central town centre locations which have excellent public transport linkages. Specifically, these areas include the identified development opportunities which will deliver new retail floorspace, homes and jobs. Each Policy Area has different and distinct requirements and opportunities to support a diverse town centre.

2.33 The six Policy Areas cover less than 50% of the total Plan boundary. Areas outside the Policy Areas are also important in supporting the town centre function; however they are largely established, have generally lower public transport accessibility and less development is expected. Within each of the Policy Areas, there are a number of sites which have the potential for development and are considered key in achieving the vision and objectives of the LTCLP. The majority of these sites are considered suitable for redevelopment to a mix of uses, including residential, retail, business, leisure and community uses and are allocated indicative development capacities for the potential delivery of both housing and new retail floorspace; we provide a brief review of these in turn on page 8.

Figure 2.1: Lewisham Town Centre Local Plan Policy Boundary *(Extract from Lewisham Town Centre Local Plan)*

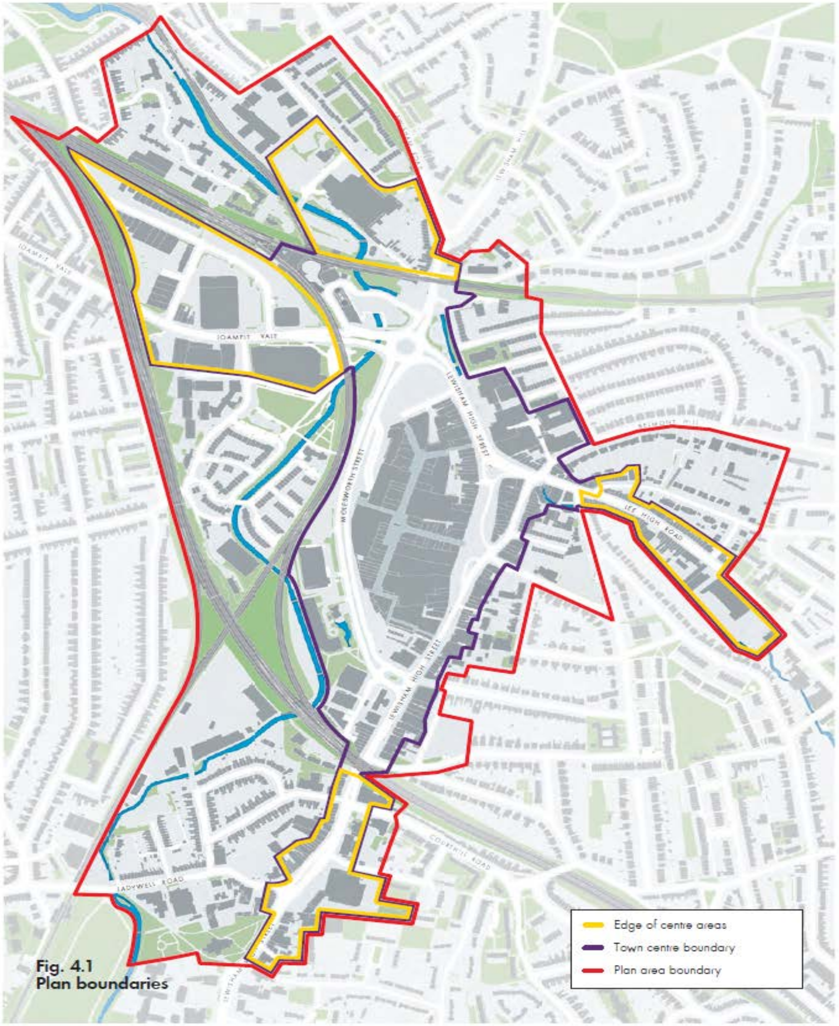


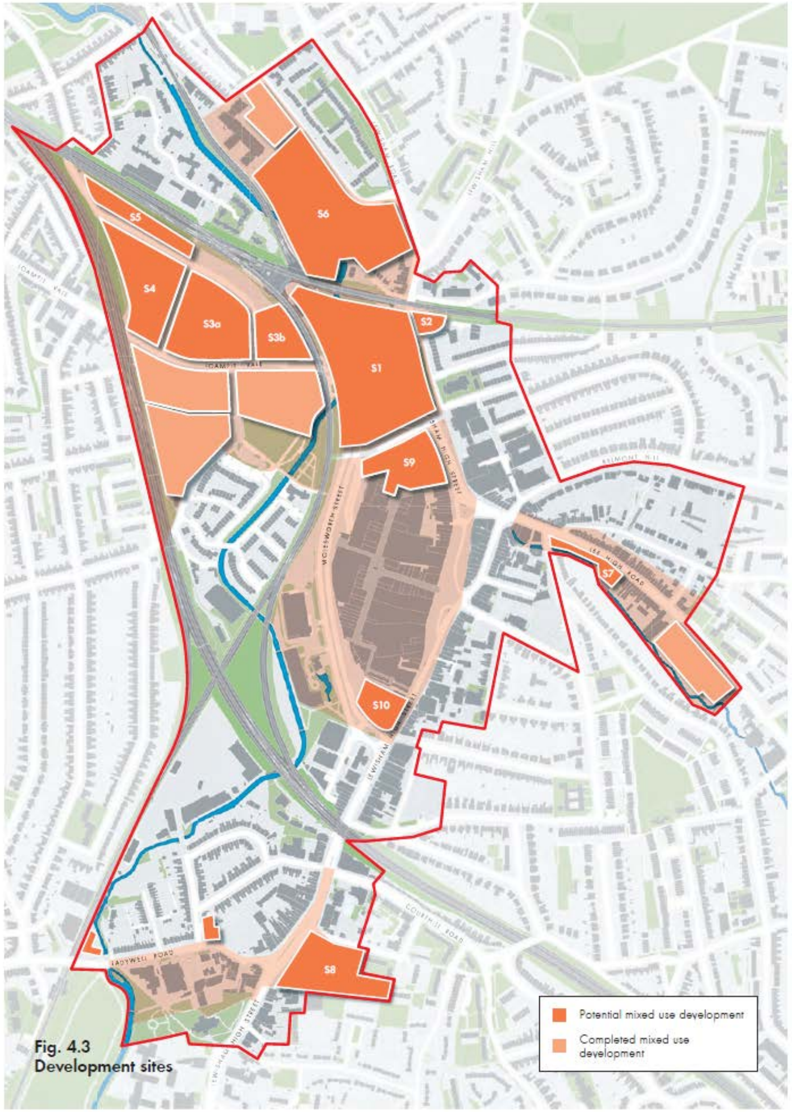
***Figure 2.2: Lewisham Town Centre Local Plan Policy Areas** (Extract from Lewisham Town Centre Local Plan)*

Policy Area	Indicative Development Capacity
Policy LTC3: Gateway Policy Area	Lewisham Gateway is identified as one of five strategic site allocations in the Council's Core Strategy (Spatial Policy 2 and Strategic Site Allocation 6) due to its scale and importance in delivering jobs, homes and other benefits. The site is the single largest development proposed for Lewisham town centre and will deliver £250 million of public and private investment. Initial site preparation work began in February 2014 and construction on this development is now underway. The Lewisham Gateway Policy Area will seek to deliver the following: • 800 homes • 17,000 sq.m retail (Use Classes A1, A2, A3, A4, A5) • 8,000 sq.m office/business (Use Class B1) • 5,000 sq.m hotel • 5,000 sq.m of leisure
Policy LTC4: Loampit Vale Policy Area	The Loampit Vale Policy Area forms the principal approach to the town centre from the west and has evolved into an edge of centre Policy Area where bulky goods retailers have tended to cluster. As part of the redevelopment of the area, the Council will seek to maximise the provision of comparison retail floor space in this edge of centre location to support the objective of becoming a metropolitan town centre. The Policy Area has more recently developed into a location of new town centre communities and high quality community facilities including a new public park, new leisure centre and new school. The Policy Area benefits from excellent public transport accessibility given its proximity to Lewisham transport interchange and there is the opportunity to provide new jobs, homes and essential community facilities. Policy LTC4 states that new retail provision should complement and not compete with the existing Primary Shopping Frontage although does not provide further guidance in this respect. South of Loampit Vale, 788 homes, ground floor commercial space and a new leisure centre have already been delivered. Additionally, approval has been granted for the comprehensive redevelopment of the Thurston Road Industrial Estate, comprising 6,771 sq.m retail, 9 live/work units and 406 homes. Construction on this development is also underway. Further capacity for development exists across several remaining sites in the policy area. Of those remaining sites in the Loampit Vale Policy Area still to be delivered, the policy identifies the following indicative capacity: • 1,000 homes • 11,200 sq.m net retail
Policy LTC5: Conington Road Policy Area	The Conington Road Policy Area is immediately to the north of Lewisham transport interchange and the planned Lewisham Gateway development. This edge of centre Policy Area is dominated by a somewhat outdated Tesco store and an associated fragmented series of surface car parks. This is a highly sustainable location with very good levels of public transport accessibility. The River Ravensbourne runs through the Policy Area in a concrete channel, while the Silk

Policy Area	Indicative Development Capacity
	Mills Path provides key pedestrian and cycle access to the town centre. There are two sites that have recently been completed in this Policy Area: 72 – 78 Conington Road – an eight to ten storey building containing 270 homes and a limited amount of commercial floorspace; and the Venson site on Conington Road – 130 homes in buildings rising to a maximum of eight storeys. The remaining development capacity in this Policy Area falls into the space where Tesco and its car parking are currently located. Tesco has expressed an interest in reviewing its store operations at this site which may include the introduction of non-retail uses including residential, although we are not aware of any developments in respect of this subsequent to the publication of the LTCLP. The Conington Road Policy Area has the following indicative capacity: • 250 homes • 3,000 sq.m net retail
Policy LTC6: Lee High Road Policy Area	The Lee High Road Policy Area encompasses Lee High Road to its junction with Eastdown Park, along with Marischal Road Shopping Parade. Lee High Road provides the principle approach to Lewisham town centre from the east. The nature of this edge of centre Policy Area is distinct from that of the retail core of Lewisham town centre, as it is characterised by smaller retail units and independent specialist retailers. The Policy Study Area already constitutes a mixed and sustainable community, with some affordable housing located alongside more affluent. Lee High Road is a traditional 'high street' which links Lewisham town centre with Lee Green District Centre, with continuous and varied ground floor retail (A1 and A3) uses, typically with several floors of residential use above. It has a strong independent character and frontages are relatively short. In 2011, a site at the eastern end of Lee High Road was completed as a new Lidl supermarket (1,750 sq.m) with 57 homes above, and this store is now trading. The western end of Lee High Road Policy Area is still to be delivered and has the following indicative capacity: • 40 homes • 2,000 sq.m net retail
Policy LTC7: Ladywell Policy Area:	The Ladywell Policy Area is the southernmost part of the town centre. An edge of centre section of this Policy Area stretches along Lewisham High Street from the end of the Hospital up to the railway bridge, while an out of centre section runs along Ladywell Road from the junction with Lewisham High Street up to the Ladywell Station Bridge. The Policy Area is characterised by a historical concentration of civic and community facilities. The Ladywell Policy Area has a different nature from the rest of the town centre. The Council has undertaken a Conservation Area management plan for sections of this Policy Area and as it is in parts unsuited to wide scale growth. However, the LTCLP identifies some important opportunities in the Policy Area, in particular the Ladywell Leisure Centre, which is considered to be surplus to requirements following the opening of the Glass Mill Leisure Centre at Loampit Vale. The Ladywell Policy Area has the capacity to deliver: • 150 homes • 1,400 sq.m net retail floorspace
Policy LTC8: Central Policy Area:	The Central Policy Area forms the core shopping area of the town, including the Lewisham Shopping Centre and the street market. The Policy Area also comprises land directly adjoining the north and south of the Lewisham Shopping Centre, Molesworth Street and Lewisham High Street. The Lewisham Shopping Centre dominates the primary shopping frontage and the LTCLP states that the owners (Land Securities Group) are keen to develop and improve the offer available. Land north of the Lewisham Shopping Centre (including the Citibank Tower) is identified as playing a 'crucial role' in achieving regeneration objectives for the town centre. To the south of the Lewisham Shopping Centre there is scope for the redevelopment of the site of the former model market (which is currently being used as temporary events space at weekend) and the Beatties building. This will help to secure the regeneration of the southern end of the High Street. The market is identified as playing an important role for local people, in that it provides sale of affordable products in an accessible location. Molesworth Street provides the principal north – south route for local through traffic and is used by a number of bus routes. However, together with the west side of the Lewisham Shopping Centre and the railway lines to the west, it acts as a significant barrier to east – west movement and the result is a fairly hostile vehicular-traffic-dominated poor pedestrian environment with reduced building frontage at the back of the Lewisham Shopping Centre. Development opportunities in the Central Policy Area have the following indicative capacity: • 200 homes • 10,000 sq.m net retail / leisure space

2.38 Within each of the Policy Areas, there are a number of major sites which have the potential for development and are considered key in achieving the vision and the objectives of the LTCLP. The majority of sites are considered suitable for redevelopment to a mix of uses, including residential, retail, business and leisure and community uses. The sites identified as key to the development of Lewisham town centre are listed below and identified in below in **Figure 2.3**. It must be noted that the number of houses and commercial floorspace being delivered can alter during the planning application process.

Figure 2.3: Development sites in Lewisham town centre *(Extract from Lewisham Town Centre Local Plan)*



Development site	Development aspirations
Gateway Policy Area	
S1: Lewisham Gateway	• See discussion above.
S2: Kings Hall Mews	• Kings Hall Mews is designated as a mixed use development site. Suitable uses will include retail (A1, A2, A3), business (B1), hotel (C1) and residential (C3).
Loampit Vale Policy Area	
S3a/b: Thurston Road – east of Jerrard Street	• The Loampit Vale Policy Area is designated for mixed use development. • The Council require a comprehensive masterplan endorsed by all landowners for these sites and their surroundings. • Taller elements of new development should address Loampit Vale. • Building lines may need to be set back to accommodate a dedicated bus lane for turning from Loampit Vale into Jerrard Street and the resultant required depth of pavement. • Accessibility to Lewisham transport interchange should be enhanced wherever possible.
S4: Thurston Road – west of Jerrard Street	• Development should take account of the southerly aspect available and the new amenity space to the south of Loampit Vale. • A food store of up to 1,500 sq m (net sales area) will be acceptable on site S4, subject to any such proposal having no demonstrable adverse impact on the Primary Shopping Area and/or the local highway network.
S5: Thurston Road – Railway Strip	• This site is considered most appropriate for a commercially led mix of uses (employment generating, most likely B1 use), although sensitive design could make some residential use acceptable.
Conington Road Policy Area	
S6: Tesco block, car park and petrol station	• Development involving underground parking, residential development, and retail expansion of the existing store (up to 3,000 sq.m net additional floorspace) will be acceptable, subject to any such proposal having no demonstrable adverse impact on the Primary Shopping Area. Development on the site will need to respond to the following principles:
Lee High Road Policy Area	
S7: Lee High Road West	• The Lee High Road Policy Area is designated for mixed use development (A1, A2, A3, B1, C3).
Ladywell Policy Area	
S8: Ladywell Leisure	• The Council will seek to bring forward a comprehensive

Development site	Development aspirations
Centre	development of the Ladywell Leisure Centre site and adjoining land where appropriate for a mix of uses including housing (C3) and retail (A1, A2, A3), subject in the case of the retail element to its having no demonstrable adverse impact on the Primary Shopping Area.
Central Policy Area	
S9: Land north of Lewisham Shopping Centre	• This site comprises land to the north east of the Lewisham Shopping Centre, the Citibank Tower and the land surrounding it. Redevelopment of the site could be in sections or phases, following the principles identified below. • redevelopment will be encouraged in conjunction with more comprehensive improvements to the Lewisham Shopping Centre to provide retail (A1 – A3) and/or leisure use on the ground floor with commercial, leisure and/or residential use on the upper floors, • active frontages should be provided at ground floor level to Lewisham High Street, the new connection road between Lewisham High Street and Molesworth Street and the new northern entrance mall to the Lewisham Shopping Centre, • any proposal should seek to enhance the existing public realm and setting of the Lewisham Shopping Centre and it's entrances, • more intensive office use or residential conversion of the Citibank Tower would be favourably considered by the Council. Any proposal should include recladding of the building and improved environmental performance, • redevelopment (including taller elements) should respond positively to the Lewisham Gateway development and provide a welcoming and accessible entrance to the centre from Lee High Road,
S10: Land south of the Lewisham Shopping Centre	The following key principles will apply to redevelopment of this site: • Comprehensive redevelopment of the Beatties Building and model market sites should provide retail (A1-A3) or leisure uses on the ground floor with commercial and or residential uses on the upper floors, • the redevelopment should mark the beginning of the commercial and retail heart of Lewisham town centre, while respecting the height, mass and bulk of local surroundings. It should create a new southern anchor for Lewisham High Street to encourage customers to travel the full length of the High Street, • buildings should make the best use of the corner site and provide enclosure and active frontages to both Molesworth Street and Lewisham High Street as positive public space.

2.39 Development of the Policy Areas must take account of the policies outlined in the LTCLP. In particular, the following area-wide policies are of importance in guiding the above areas' future development:

- **Policy LTC14 (Town Centre Vitality & Viability)** confirms that new development in the town centre will need to sustain and enhance the viability and vitality of the wider town centre.
- **Policy LTC15 (Lewisham Market)** states that the Council will continue to promote Lewisham Market as an essential part of the retail centre and encourage ancillary facilities in order to maintain its viability.
- In accordance with **Policy LTC16 (Retail Areas)**, within primary shopping frontage, the Council will strongly resist any change of use involving the loss at ground floor level of Class A1 shops.
- In accordance with **Policy LTC17 (Evening Economy Uses)**, the Council will encourage proposals for new uses that would positively contribute to the evening economy of the town centre.

3 NATIONAL TRENDS

3.1 In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in the Borough.

A return to growth

3.2 Analysis published by Experian (Retail Planner 2015) identified that following several years of subdued performance, including a period of recession; a 'strong economic upswing' took place in early 2013, driven by increases in consumer spending and business investment. Experian expect the UK economic upswing to continue, although at a slower pace than seen in recent years.

3.3 In the short-to-medium term, Experian expect progress to be 'restrained' due to government finances remaining under pressure, and weaker exports to the Eurozone. The uncertainty of the UK's future relationship with the European Union in the wake of the decision by the UK to leave the EU could also impact on economic growth, although Experian are yet to publish any data confirming the extent to which this may be the case.

3.4 Experian also point to the fact that whilst retail sales have prospered between 2013 and 2016 due to the 'exceptional buoyancy' of consumer spending (because of low inflation and stronger earnings growth), this buoyancy is only true in terms of volumes of sales. Experian state that the value of goods has 'been depressed by heavy discounting and persistent deflation of goods prices'. This has been particularly noticeable in the convenience goods sector.

3.5 There has therefore been a return in confidence to consumer spending since 2013, and accordingly experts attending the Local Data Company's bi-annual retail and leisure summit (September 2016) confirmed that consumers are spending as opposed to saving. This offers an opportunity for strongly-performing town centres to capitalise on, although this is tempered by other changes in the retail sector which we discuss below.

3.6 As noted above, the implications of the UK's decision to leave the European Union in June 2016 may also provide a further restraint on future levels of expenditure growth, given the uncertainty over the nature and format of the country's future relationship with Europe will be. Current speculation exists around future shop price inflation and 'squeezed' consumer living standards, resultant of a continuing weak pound. However, data providers such as Experian have confirmed that it is too early to speculate on the extent to which this decision may influence economic growth in either the short to medium term. This will need to be monitored carefully over the course of the Council's new Local Plan period by way of regular updating of the Council's retail capacity forecasts.

Changing Retailer Space Requirements

3.7 During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. Many operators are continuing to close stores in less-profitable, smaller locations as leases expire.

3.8 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats. This can pose a particular challenge to smaller and medium-sized centres, where there are higher order centres in close proximity.

3.9 An often inevitable consequence is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Primark and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. The higher-order centres in Lewisham (Lewisham and Catford town centres) both contain strong representation from the discount/value retail sector, and whilst this is balanced by a more (albeit limited) 'mainstream' offer in Lewisham town centre, Catford is an example of a centre which has settled into a relatively downmarket retail profile (see **Section 5**). Other centres have remained more immune to this trend, largely because they have an existing upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. Blackheath is an example of a centre which has remained relatively immune in this respect.

Internet Growth & Multichannel Retailing

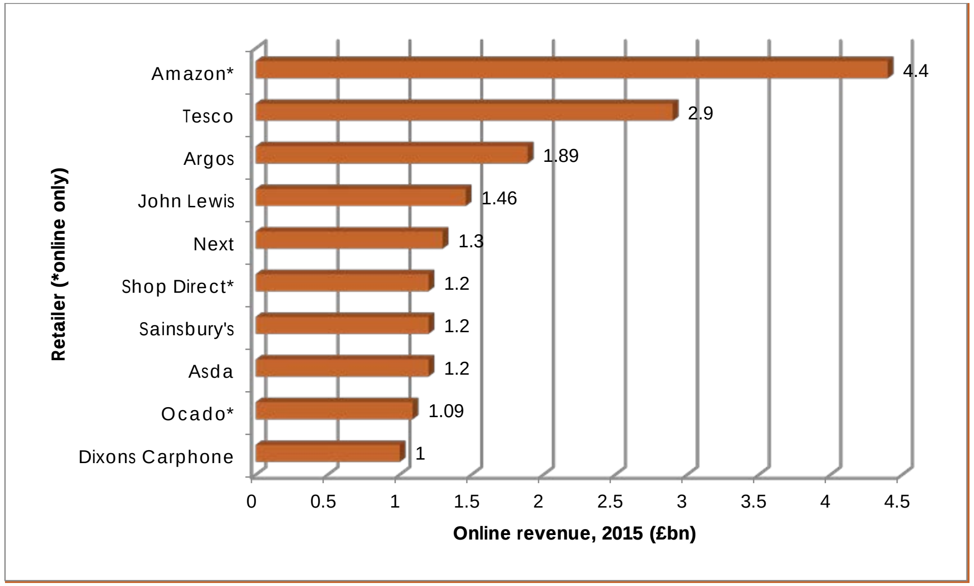
3.10 Experian's forecasts for 'special forms of trading', which is mostly accounted for by online shopping, show that the online shopping population is likely to reach saturation over the course of the study period (see **Section 7**), meaning that any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.

3.11 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by

82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict comment that '*the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement*'. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.

3.12 Many national retailers who are trading in Lewisham's centres operate 'Click & Collect' facilities, with examples including Marks & Spencer, Sainsbury's, Boots and Next. It is noteworthy that of the top ten online retailers in 2015, seven have a physical presence on the UK High Street, and all of these offer 'Click & Collect' facilities (**Figure 3.1**). Despite being a relatively new concept for the retail sector to embrace, click & collect is therefore affirming that physical stores can continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition. Importantly for the network of centres in Lewisham, the Click & Collect phenomenon can be expected to drive an occupier desire to maintain a representation of physical store units across town centres.

Figure 3.1: Top ten UK retailers by online revenue, 2015



*Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores*

The role of the town centre

3.13 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the final quarter of 2015[1], emphasising the need for centres to offer a broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.

3.14 The plans for Lewisham Gateway seek to introduce more uses of this nature into the town centre, building on the recent completion of the Glass Mill Leisure Centre. Centres such as Forest Hill and Blackheath already have a strong café and restaurant culture, and are therefore well-positioned to take advantage of these changing patterns of consumer behaviour. Other centres such as Catford have a less well-developed offer (which we discuss in our health check assessment of Catford in **Section 5**), and this represents an important opportunity in future years. Centres which offer unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly.

3.15 Enhancing the non-retail offer so town and district centres function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness. To ensure that town and district centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, as well as investment in public realm and place marketing initiatives.

The convenience sector

3.16 The convenience goods market has witnessed a fundamental change in shopping patterns in recent years, as people increasingly prefer to shop more frequently in smaller-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016, although we are not aware of any foodstores in the Borough which have been affected by these scaling back of operations.

[1] Source: British Retail Consortium, January 2016

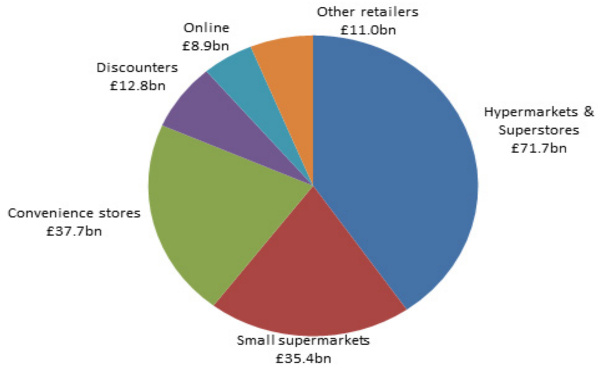
Sainsbury's, Bell Green, Sydenham

3.17 The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and are pursuing ambitious development programme of opening new stores as well as refurbishing older stores. There has also been growth at the 'premium' end of the convenience goods market, with both Waitrose and M&S Food growing store numbers (although M&S has a relatively limited presence in the Borough at present, and Waitrose is not currently represented.)

3.18 The chart adjacent (**Figure 3.2**) shows the composition of the convenience goods sector in 2015, based on data collected by The Institute of Grocery Distribution (IGD). IGD estimate that the UK grocery market was worth £177.5bn in 2015, and of this 'convenience stores' (defined by IGD as stores under 3,000 sq.ft net) claiming £37.7bn of this (21.2%). However, as Figure 3.2 shows, notwithstanding the unquestionable growth in the popularity of 'convenience' stores, most of the food shopping spend is still accounted for by larger-format stores — £71.7bn was spent in 'hypermarkets and superstores' (stores over 25,000 sq.ft net), and a further £35.4bn in 'small supermarkets' (stores between 3,000 and 25,000 sq.ft net).

3.19 There is, therefore, still a role for the larger-format store to play in convenience goods shopping, but operators are opening smaller format stores than was the case at the time of the Council's previous study; a good recent example of this is Asda's new smaller-format store (one of the first it is trialling in the south-east) in Deptford High Street, which opened in July 2015 and extends to just 6,000 sq.ft (557 sq.m).

Figure 3.2: UK grocery market spending, 2015



Source: IGD UK Grocery Market and channel forecasts 2015-20. Data is for year to 31st March 2015.

3.20 Operators with 'hyper-market' format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury's are trialling Argos concessions following the company's acquisition of Home Retail Group in 2017, and branches of Tesco Extra include either concessions from other Tesco-owned brands, or other fashion retailers.

3.21 Supermarket operators are continuing to invest in new stores, although new store openings are becoming a less frequent occurrence. The large Sainsbury's stores at Bell Green, Sydenham, and just outside of the Borough at Charlton Riverside, are amongst only a handful of larger-format stores the operator has completed in recent years. Positively, we are aware that Asda have recently signed to operate a new foodstore as part of the mixed-use Thurston Central development at Loampit Vale in Lewisham town centre, and we understand that Asda are also proposed to be the 'anchor' tenant to St. Mowden's redevelopment of the Leegate Centre in Lee District Centre, should this proposal be granted planning permission.

3.22 These examples confirm that there remains appetite from foodstore operators to open new stores where suitable opportunities arise, although the size of foodstores being committed to is generally less than has previously been the case. We expect the 'big four' retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Out-of-Centre Retailing

3.23 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

3.24 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations (such as Purley Way, Croydon), as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M.

3.25 The major concentration of out-of-centre retailing in London Borough of Lewisham is the Bromley Road Retail Park near Catford, and the former Sydenham Gas Works site, which has been redeveloped as Bell Green Retail Park. The Retail Park is a new addition to the retail offer of the Borough which was not trading at the time of the Council's previous retail study; it was completed in 2013, and was fully open by the end of 2014. A large Sainsbury's supermarket has occupied part of the site since the 1990s and this has subsequently been joined by retailers including Curry's PC World, B&Q, Toys R Us and Next. There is a further major concentration of out-of-centre retailing to the east of the Borough at Charlton, which falls within LB Greenwich; this has also seen expansion in recent years through the opening of large new Sainsbury's and Marks & Spencer stores, and an Ikea store expected to be forthcoming.

3.26 Another trend is the evolution of traditional retail 'box' warehouse developments into retail parks, sub-dividing units, expanding the product offer, and developing beyond just retail to introduce food and beverage, encouraging longer dwell times (an example of this being the new Next store at Bell Green which includes a Costa coffee concession). Retail park owners are also refurbishing their retail parks; i.e. public realm, walkways, car parks, signage, landscaping and seating to enhance the visitor experience.

Commercial Leisure

3.27 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres.

3.28 Leisure time is a precious commodity to consumers and in order to maximise free time, town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.

3.29 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. In recent years, expansion in the restaurant sector has been driven by 'casual dining' operators such as Byron, Giraffe, GBK, Wagamama, Carluccios, Pizza Express and so on – although it is interesting to note that with the exception of Blackheath, most of Lewisham's centres have not attracted significant interest from these type of operators to date.

3.30 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers, particularly in London's network of smaller town centres and district centres, with New Cross, Forest Hill and Sydenham (Kirkdale) examples of centres benefiting from openings in this sector in recent years.

Sylvan Post, Forest Hill (picture credit: Antic Group)

3.31 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country (The Independent, February 2014/Campaign for Real Ale – CAMRA). Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand. In London, the popularity of specialist pubs offering craft beers and local ales also remains strong, with companies such as Antic acquiring and converting vacant premises to open new pubs including several in Lewisham such as the Sylvan Post in Forest Hill, the Catford Constitutional Club in Catford, and The Job Centre in Deptford.

3.32 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym; The Gym Group opened in Lewisham town centre in 2016, and another gym – Soho Gyms – is opening in the centre later in 2017. This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or ‘pay as you go’ subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.

Summary

- **The ‘traditional’ high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. Whilst confidence is now returning to consumer spending — particularly in terms of comparison goods spending — the growth in online shopping, including multi-channel retailing, acts as tough competition for the high street. It also however presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like ‘click & collect’, and retailers moving towards a seamless transition between store-based and virtual shopping experiences. Online shopping is expected to continue to grow during the study period but will, in the case of comparison goods, likely hit a ‘saturation point’.**
- **Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to ‘high street’ retailers. Many retail parks are seeking to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.**
- **Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping ‘experience’, maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. Lewisham town centre’s new development at Lewisham Gateway provides the ideal opportunity for the centre to diversify the range of uses to enable longer dwell times, and meet a number of gaps in the current offer of the centre (which we identify in full in this report).**
- **It will be important, therefore, for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other ‘unique selling points’ should be capitalised on, and robust place marketing strategies put in place.**

4 THE SUB-REGIONAL CONTEXT

4.1 In this section, we set out the sub-regional context within the centres in the Borough operate. This is an important consideration as patterns of retail and leisure visits are not 'closed' systems, and residents are often prepared to travel longer distances, particularly for comparison goods shopping and leisure visits. It is therefore natural to expect a degree of expenditure loss to other centres surrounding the Borough; this is simply part of the retail hierarchy of an area.

4.2 Indeed, parts of LB Lewisham are more closely or equally related to centres outside the Borough (e.g. Bromley or Croydon) than they are to higher-order centres within the Borough itself. Indeed, both Bromley and Croydon are 'Metropolitan Centres' (as defined by the London Plan) and can have a wide and established catchment area.

4.3 In order to establish where residents in the Borough are currently undertaking their shopping and leisure visits, a household telephone survey of shopping patterns was undertaken in support of this study. Further details of this, including the definition of the 'study area' which has formed the basis of our assessment, is provided in **Section 7**. To summarise, the household survey identified that the following destinations represent the key competitors for centres in LB Lewisham, in respect of comparison goods spending[2]:

- **Lewisham Major Town Centre** (claims £336.5m / 14.9% of comparison goods spending available to the study area;
- **Central London** (claims £290.9m / 12.9% of comparison goods spending available to the study area);
- **Bromley town centre** (claims £283.0m / 12.5% of comparison goods spending available to the study area);
- **Croydon town centre** (claims £152.3m / 6.7% of comparison goods spending available to study area) and Croydon retail parks (claims £75.4m / 3.3% of comparison goods spending available to study area);
- **Bluewater** (claims £102.2m / 4.5% of comparison goods spending available to study area);
- **Old Kent Road retail parks** (claims £87.3m / 3.9% of comparison goods spending available to study area)
- **Surrey Quays** (claims £81.7m / 3.6% of comparison goods spending available to study area);
- **Peckham** (claims £55.1m / 2.4% of comparison goods spending available to study area);
- **Greenwich** (claims £45.9m / 2.0% of comparison goods spending available to study area);
- **Catford Major Town Centre** (£42.5m / 1.9% of comparison goods spending available to study area); and
- **East Dulwich District Centre** (£26.2m / 1.2% of comparison goods spending available to study area).

4.4 The household telephone survey undertaken in support of this study has confirmed that Canary Wharf does not currently form a 'competing centre', but this should be monitored given the aspiration of Canary Wharf to become a Metropolitan Centre through major new town centre development over the next 3-5 years.

4.5 A total of £618.4m (equivalent to 27.4% of comparison goods spending available to the study area) is spent at locations in Lewisham Borough, the majority of which is spent in the network of town and district centres in the Borough. We present an overview of the performance of these in **Section 5** (for Lewisham and Catford town centres) and **Section 6** (for the district centres in the Borough); however first we review the role and function of the key competing centres identified above, and set out the planned developments which may alter the 'market share' they draw from the study area over the course of our study period to 2033.

4.6 Plans of the catchment areas of all the above-listed competing centres, showing from where in the Borough they draw their trade, are provided in **Volume 2** to the study.

BROMLEY (LB BROMLEY)

Bromley Metropolitan Centre

4.7 Bromley is defined as a Metropolitan Centre in the London Plan. Venuescore ranks Bromley in 39th position in its 2014-15 Index and identify the 'market position' of Bromley as being 'Upper Middle', suggesting its retail offer is more orientated towards a higher quality mix than Croydon and Lewisham, for example. The Experian Goad category report for Bromley (March 2015) identifies a total of 138,300 sq.m of ground floor floorspace for retail and service units, comprising 495 units. The centre is an attractive shopping destination, appears to trade healthily and has a low vacancy rate of 5.7% (March 2015).

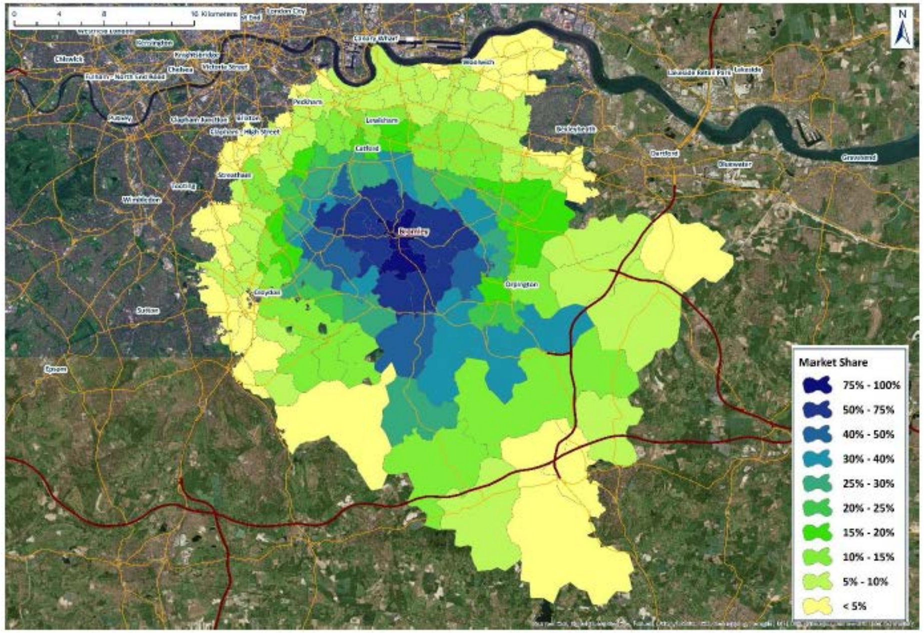
4.8 There is a high proportion of comparison retail uses, significantly above the national average (variance of +10.3%). The focus of the retail offer is in The Glades covered shopping centre (which opened in 1991 but has been recently refurbished following acquisition by Intu, who then subsequently sold the centre in October 2016) and the adjacent High Street, which includes retailers such as Marks & Spencer, Primark, Zara and H&M, as well as a number of more specialist/upmarket retailers such as Apple, L'Occitane, The White Company, Hotel Chocolat and Lakeland.

4.9 The sizeable retail offer in Bromley is reflected in its classification as Metropolitan Centre and accordingly the catchment area of the centre is substantial. As shown in **Figure 4.1**, Bromley's

[2] All destinations which claim over 2.0% of comparison goods spend are listed.

catchment area covers all of LB Lewisham, and extends as far towards central London as Peckham/Brixton, albeit with low market shares from this area. The catchment area of Bromley also extends south-westwards to overlap with that of Croydon, and southeast to Orpington/Bexleyheath. The household telephone survey undertaken in support of this study also confirms that Bromley has a comparison goods trade draw which extends across the entirety of London Borough of Lewisham.

Figure 4.1: Bromley catchment area



Source: Harper Dennis Hobbs Retail Centre Reports (2016)

Out of Centre Retailing in Bromley

4.10 There is relatively little out-of-centre retailing in Bromley, particularly when compared to Croydon. Bromley Road Retail Park (7,432 sq.m of retail floorspace) fronts the A21, and is south of Catford town centre and north of Bromley. Tenants include PC World, Currys, Harveys and Carpetright, and all operators on the site are 'bulky goods' in nature. 313 parking spaces are provided on site.

Planned Development

4.11 In July 2014, planning permission was granted for an extension to what as, at the time, the Intu Bromley Shopping Centre (now called The Glades), including the refurbishment of the shopping centre, new restaurants, a boutique cinema and a garden terrace. Reflecting the trend seen in many town centres, this application is evidence of the offer of town centres diversifying away from solely being focus of retail activity, towards providing a more diverse offer which encourages longer dwell-times.

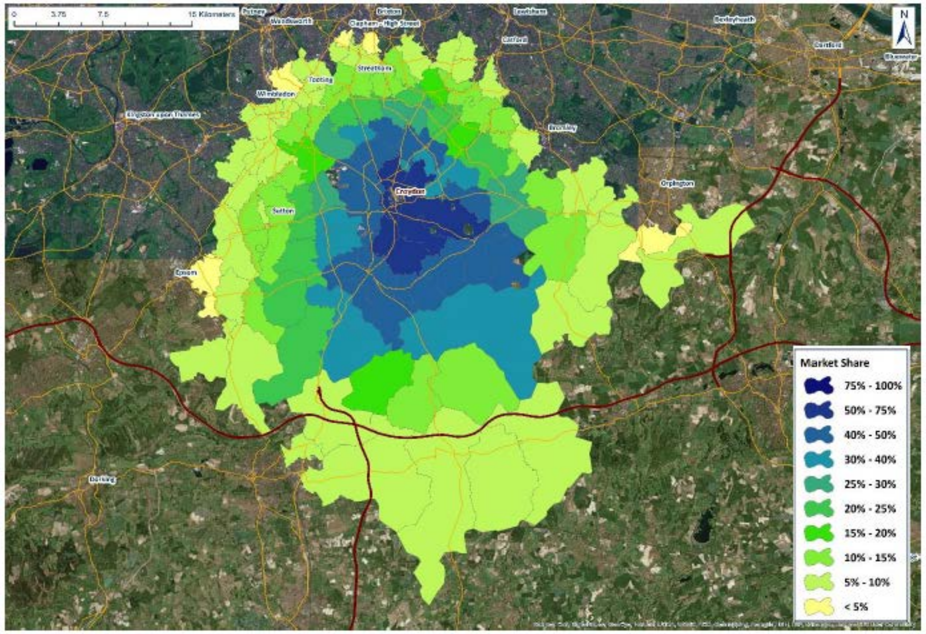
4.12 Elsewhere in the town centre, the Bromley South Central development is currently underway. The Cathedral Group, in partnership with Bromley Council, is currently carrying out construction works to create a £90 million development including a 130 bed hotel, multiplex Vue Cinema and c. 2,300 sq.m of new café and restaurant space, as well as 200 new apartments. Work is also underway that will facilitate the improvement of Bromley's High Street environment. Bromley Council have commissioned Studio Egret West Architects to prepare the outline designs for the pedestrianised area of Bromley High Street which will, if implemented, further enhance the vitality and viability of the town centre.

CROYDON (LB CROYDON)

Croydon Metropolitan Centre

4.13 Croydon is defined as a Metropolitan Centre in both the London Plan and Croydon Core Strategy. Venuescore ranks Croydon in 23rd position in its 2014-15 Index and identify the 'market position' of Croydon as being 'Middle'. The Experian Goad category report for Croydon (March 2015) identifies a total of 250,200 sq.m of ground floor floorspace for retail and service units, comprising 964 units. The Primary Shopping Area comprises the covered Whitgift and Centrale Shopping Centres, Crown Hill and Church Street. Reflecting its status as a Metropolitan Centre, its retail catchment is extensive, and extends into southern parts of LB Lewisham (covering the Forest Hill / Sydenham areas) and much of south London / northern Surrey up to Epsom and Redhill (**Figure 4.2**).

Figure 4.2: Croydon catchment area



Source: Harper Dennis Hobbs Retail Centre Reports (2016)

4.14 Croydon has a relatively strong representation of national retailers with a good comparison offer, although the quality if the retail offer is largely restricted to mid-market and value retailers (reflected in the Venuescore 'Middle' ranking of the market positioning of the centre. The average representation of comparison goods retailers is broadly in line with that of the national average (variance of -2.8%). Major retail tenants include Primark, H&M, Marks & Spencer, Debenhams, House of Fraser, Next and Zara. There is a considerable amount of overlap with the comparison goods retail offer in Lewisham town centre, however units in Croydon are generally larger and Croydon benefits from the presence of two department stores, whilst there are none in Lewisham.

4.15 Croydon has a diverse convenience offer including budget, mid-range and high-end stores. The main convenience offer includes a Waitrose, Sainsbury's and two Lidl stores which are supplemented by a number of independent convenience stores. The centre has a strong services offer (variance of +9.7%). Of particular note is the high proportion of food and drink units. National multiple outlets present include Zizzi, Pizza Express, Wagamama, Costa Coffee, Starbucks and Caffé Nero.

4.16 The Experian Goad category report for Croydon identifies a total of 161 vacant units, equating to a vacancy rate of 16.7%. This is above that of the national average of 11.4%, although needs to be considered in the context of the fact that a number of sites in the town centre are currently being redeveloped. The Goad report shows that 10.2% of floorspace in Croydon is vacant compared to a national average of 9.2%.

4.17 Croydon town centre is well served by public transport reflected in its PTAL of 6B. The centre is served by services to other major centres including Lewisham (via Forest Hill), Kingston, Sutton and Bromley. There are two rail stations located within the town centre, East Croydon station on George Street and West Croydon station on London Road. The centre also benefits from a tram service which runs between Wimbledon, New Addington, Elmers End and Beckenham.

4.18 Whilst Croydon is generally considered to be performing reasonably well, there are aspirations for a significant upgrade to quality and range of 'town centre uses', including its retail offer, which are expected to come forward in the short to medium term. We discuss these separately below.

Out of Centre Retailing in Croydon

4.19 There are six retail parks and a substantial number of standalone retail warehouse units in Croydon located on and in the vicinity of Purley Way (A23), to the west of Croydon town centre. This collection of out-of-centre retail warehousing is a major attraction and one of the largest concentrations of such facilities in London. Two of the main retail attractors in this location include IKEA and John Lewis at Home. Many of the retail units trade from open A1 non-food planning consents, and accordingly there are a large number of 'town centre' retailers trading alongside a number of 'bulky goods' operators. Examples of other retailers trading include Next (who have recently secured planning permission for development of a flagship 'Next Home' store on a site at Trojan Way), Decathlon, TK Maxx, Toys R Us, Currys, Dunelm and so on.

4.20 Valley Park Leisure Park also contains a number of leisure uses, including a Vue multi-screen cinema, Tenpin bowling and fast-food and casual dining restaurants. Trafalgar Way Retail Park contains a Sainsbury's supermarket.

Planned Development

4.21 Croydon is currently in the midst of a substantial programme of regeneration, with over £5bn worth of investment expected in the Borough in the next five years. Much of this investment comes from joint developers Hammerson and Westfield's proposed redevelopment of the central retail area in Croydon town centre; the consortium obtained outline planning permission in February 2014 for the comprehensive mixed use development of the Centrale and Whitgift Centres in and adjoining land to provide 136,500 sq.m of new retail floorspace, 16,400 sq.m of leisure facilities, up to 600 town centre homes, and community and office use, although the approved scheme has been subject to a number of revisions and amendments to its size and mixture of uses subsequent to the original consent being granted.

4.22 It is likely that the development will be complete and operational during Lewisham's new integrated Local Plan timescales, and, if progressed, can be expected to have an impact on patterns of shopping of residents in the Borough (particularly to the south of the Borough), although the exact extent to which shopping patterns will be impacted will largely be dictated by the strength of the new retail and leisure offer.

CGI of Boxpark Croydon (picture credit: Boxpark)

4.23 The East Croydon Station 'Gateway' site is subject to a planning permission granting the redevelopment of the site to provide a mix of uses including between c. 7,300 sq.m and 10,900 sq.m of Class A1-A5 retail floorspace. The first phase of this scheme is currently underway but includes no retail. Part of the site houses the Boxpark Croydon development, which provides pop-up food and drink retailers in an assembled collection of 80 shipping containers, centred around a covered courtyard. The development is the first foray for Boxpark outside its original successful location in Shoreditch. Boxpark Croydon opened in Summer 2016.

4.24 In the wider town centre, capacity has been identified for over 7,000 new residential spaces over the next 25 years. The town centre is also gaining momentum as a hub for tech start-up businesses. A major investment programme into improving the centre's public realm is also underway.

BLUEWATER SHOPPING CENTRE (DARTFORD BOROUGH COUNCIL)

4.25 Opening in 1999, Bluewater comprises over 300 stores and is one of the UK's largest shopping centres. Venuescore ranks Bluewater in 26th position in its 2014-15 Index and identify the 'market position' of Bluewater as being 'Middle'. It also acts a major commercial leisure destination, with a 13-screen Showcase Imax cinema, and upwards of 50 restaurants trading alongside the retail offer. The Experian Goad category report for Bluewater (November 2014) identifies a total of 153,200 sq.m of ground floor floorspace for retail and service units, comprising 331 units.

4.26 The comparison goods offer is nearly double that of the national average (variance of +33.7%). T Bluewater provides a good mix of mainline fashion multiple retailers (Aldo, Coast, Dorothy Perkins, Gap, H&M, Miss Selfridge, Monsoon, Next, Nike etc.) as well as a number of higher-end retailers such as Fred Perry, Hackett, Hobbs, Jaeger, Jigsaw, Jo Malone, Reiss, LK Bennett, All Saints etc.)

4.27 The retail offer is supported by a strong food and beverage offer including Wagamama, Giraffe, Wahaca, Cote Brasserie, Jamie's Italian, Carluccio's, Loche Fyne, Café Rouge, Starbucks, Café Nero, Costa, Burger King, KFC, McDonalds etc. There, combined with the strong retail mix, mean that Bluewater is a 'destination', and the centre can be expected to attract a significant number of day trip visits.

Planned Development

4.28 In August 2013, outline planning permission was granted for an extension to Bluewater's West Village. The permitted extension comprises new net additional A1-A5 floorspace up to 30,500 sq.m, reconfiguration of the existing parking areas and lake and new open space/public realm. Initiation of this extension is yet to begin, and the proposed retailers who will occupy units within the extension are currently unknown. It would be reasonable to expect that some of the approved quantum of floorspace will be used to extend the existing comparison goods offer in the centre.

SURREY QUAYS / CANADA WATER (LB SOUTHWARK)

4.29 **Surrey Quays** is defined as a District Centre in both the London Plan and Southwark Core Strategy. Venuescore ranks Surrey Quays/ Canada Water in 549th position in its 2014-15 Index and identify the 'market position' of Canada Water as being 'Middle'. The Experian Goad category report for Surrey Quays/ Canada Water (January 2014) identifies a total of 47,213 sq.m of ground floor floorspace for retail and service units, comprising 143 units.

4.30 Surrey Quays is centred around a purpose built shopping centre (Surrey Quays Shopping Centre), which has a relatively strong representation of national retailers, mostly comprising comparison goods retailers. The average representation of comparison goods retailers is broadly in line with that of the national average (variance of -1.4%). Major retail tenants include Burton, Dorothy Perkins, New Look, River Island, Carphone Warehouse, O2, Superdrug and Boots. The centre's large former BHS store has been occupied by a branch of home & garden retailer The Range. A large Tesco Extra supermarket (7,367 sq.m) anchors the centre. The remainder of the centre is comprised of mostly smaller-format units along Lower Road, which links Surrey Quays to Deptford. Most of the retail offer here is independent retailers, alongside representation from operators such as Wetherspoon and Barclays; it is expected that this area serves a much more localised catchment.

4.31 Surrey Quays Leisure Park is situated on Redriff Road, between Surrey Quays Shopping Centre and Harmsworth Quays, within the defined policy boundary of the centre. Leisure and dining facilities include an Odeon cinema, Gala Bingo, Hollywood Bowl, Frankie & Benny's, Pizza Hut and Café East. The findings of the household survey (discussed in further detail in Section 10 in respect of commercial leisure uses) confirms that Surrey Quays exerts a significant influence over patterns of commercial leisure visits for much of Lewisham Borough, particularly in the absence of a comparable range of facilities within the Borough itself.

4.32 Surrey Quays, Rotherhithe and Canada Water stations all connect to the Overground network. Canada Water is also on the Jubilee Line and provides direct links eastbound to Canary Wharf and Stratford and westbound to London Bridge and central London. Local bus routes include 1 (to Holborn), C10 (to Victoria), 47 (to Catford/Shoreditch), and 188 (to North Greenwich/Russell Square via Rotherhithe).

Planned Development

4.33 British Land (the owners of Surrey Quays Shopping Centre) is working with Southwark Council to bring forward a mixed use development to support the aspiration of the Canada Water Masterplan, which sets out the intention of delivering a new town centre for the area to replace the current dated shopping and leisure facilities and improve integration between different components of the centre. The London Plan also identifies Surrey Quays as an Opportunity Area.

4.34 Since March 2014 there has been an on-going community consultation process to look at the future of the Canada Water Masterplan. This includes redevelopment of the SE16 Printworks Site (formerly known as Harmsworth Quays), the Surrey Quays Shopping Centre Site and the Surrey Quays Leisure Park Site. In March 2015, British Land acquired the freehold of the Surrey Quays Leisure Park Site, which has now been fully considered as part of the Canada Water Masterplan area. The SE16 Printworks Site was vacated in September 2013 after the Daily Mail General Trust decided to move their operation to Essex. British Land subsequently purchased DMGT's interest of the site.

4.35 There is an existing planning permission to extend Surrey Quays Shopping Centre, however it appears that the current aspirations are for a more ambitious redevelopment of the site, which will help create a new town centre for Canada Water.

GREENWICH (LB GREENWICH)

4.36 Greenwich town centre lies a short distance to the east of the Borough, in close proximity to both Deptford and Blackheath. The centre has a leisure/tourism-orientated focus on account of the internationally famous Cutty Sark, Royal Observatory, National Maritime Museum and former Royal Naval College. There are two hotels in the town centre, a good selection of cafés, restaurants and bars and as well as a Picturehouse cinema. There is also a large campus for the University of Greenwich in the heart of the town centre.

4.37 Greenwich is defined as a Major Centre in both the London Plan and the Greenwich Core Strategy. Venuescore ranks Greenwich in 601st position in its 2014-15 Index and identify the 'market position' of Greenwich as being 'Upper Middle'. The Experian Goad category report for Greenwich (August 2015) identifies a total of 40,924 sq.m of ground floor floorspace for retail and service units, comprising 295 units. The main shopping area is based around Greenwich Church Street, College Approach, Nelson Road, the High Road and the covered market. Approximately half a mile to the west of this area is Trafalgar Road, which is a local centre providing for the daily shopping needs of the surrounding resident population.

4.38 The comparison goods offer is below that of the national average (variance of -5.1%). The centre benefits from a mix of independent and specialist retailers, alongside a handful of national retailers including Boots, Superdrug and Waterstones, etc. The covered market is a popular and important asset to the centre.

4.39 Greenwich has a Level 5 PTAL which indicates overall good accessibility by public transport. There are two train stations within Greenwich; Greenwich Station provides overland train services to central London (via Deptford) as well as DLR connections. Cutty Sark station provides DLR services. Local bus services run throughout both parts of the centre providing services north and south of the River Thames. There are also River Boat services from Greenwich Pier along the River Thames to Central London.

PECKHAM (LB SOUTHWARK)

Peckham town centre

4.40 Peckham is defined as a Major Centre in both the London Plan and Southwark Core Strategy. Venuescore ranks Peckham in 307th position in its 2014-15 Index and identify the 'market position' of Peckham as being 'Lower'. The Experian Goad category report for Peckham (August 2015) identifies a total of 78,550 sq.m of ground floor floorspace for retail and service units, comprising 414 units. The two main shopping streets include Rye Lane, running north-south, and Peckham High Street, running east-west) which meet at a junction.

4.41 The convenience goods offer is over double that of the national average (variance of +10.3%) and is anchored by Morrisons, Lidl, Asda and Iceland supermarkets. This convenience goods offer is supplemented by several butchers, convenience stores, greengrocers, a large number of grocers plus delicatessens, health foods stores and off licenses. Whilst the average representation of comparison goods retailers is broadly in line with that of the national average (variance of +1.0%), it caters to lower order multiple retailers in terms of its comparison shopping offer. Major retailers present include Primark, Argos, Boots, and Superdrug etc. The services offer is below that of the national average (variance of -8.3%), particularly leisure services.

4.42 There is an underrepresentation of restaurant and café uses in the centre although a strong independent sector operates in peripheral parts of the centre, and on nearby Bellenden Road, and qualitatively the centre appears to have been a number of new bars and restaurants opening in recent years. There is particularly high provision however, of fast food/takeaways.

Planned Development

4.43 Southwark Council is working in partnership with the Greater London Authority, Network Rail, and Southern Railways to significantly improve the area around Peckham Rye Station and make it more attractive to shoppers, businesses and visitors to Peckham. The council has committed £10 million of funding for the Gateway Project and has secured £5.25 million from the Mayor of London's Regeneration Fund. Redevelopment will include infrastructure improvements and an enhanced public realm. Initial proposals have also been revealed for a potential redevelopment of the Aylsham Centre, which include the centre's anchor Morrisons foodstore.

EAST DULWICH (LB SOUTHWARK)

4.44 East Dulwich is defined as a District Centre in both the London Plan and Southwark Core Strategy. Venuescore ranks East Dulwich in 1,531th position in its 2014-15 Index and identify the 'market position' of East Dulwich as being 'Middle'. The Experian Goad category report for East Dulwich (July 2013) identifies a total of 22,400 sq.m of ground floor floorspace for retail and service units, comprising 165 units. The centre has a fairly localised catchment which is restricted to zone 10 of the survey area (discussed in the following section)

4.45 Lordship Lane is the focus of the commercial offer in the centre, which has a good comparison shopping provision with mainly quality independent retailers and upmarket national retailers including Jojo Maman Bebe, Oliver Bonas and White Stuff. The convenience goods offer is anchored by a large Sainsbury's on Dog Kennel Hill and a smaller in-centre Co-Op store. An Iceland store in the centre has recently been replaced with an M&S Foodhall. There is a particularly strong provision of upmarket restaurants, cafés, public houses, bars and wine bars in the centre, including operators such as Franco Manca, GBK, and a wide range of independent outlets. A Picturehouse cinema opened in the centre in 2015.

OUT-OF-CENTRE RETAIL DEVELOPMENTS

4.46 The key competing out-of-centre retail facilities (other than those summarised above in respect of Croydon and Bromley) are the concentration of retail warehouse units which run along Old Kent Road, in LB Southwark, and are particularly accessible for residents in the New Cross / Deptford areas. Facilities here include the Southernwood Retail Park, which includes branches of Argos, Sports Direct and DFS alongside a Tesco foodstore; further south along Old Kent Road is a further retail park containing a B&Q, Pets at Home and Halfords stores; and beyond this (towards New Cross) is a standalone Toys R Us store. Southwark Council are currently preparing an Area Action Plan for Old Kent Road, in conjunction with the Greater London Authority. This document will, upon adoption, guide the comprehensive regeneration of this area, which is expected to include 20,000 new homes, and a 'revitalised high street'.

4.47 Elsewhere, retail warehouse facilities at Charlton draw trade from residents in the Greenwich / Blackheath areas but have a limited influence over shopping patterns beyond this. There is quite a substantial concentration of retail warehouse and large foodstore development in this area, including 'high street' retailers such as H&M, Next, New Look, River Island and Clarks at Greenwich Shopping Park; new large Marks & Spencer and Sainsbury's stores at Charlton Riverside, as well as branches of Argos, Pets at Home, Staples, Smyths Toys and Asda.

Summary

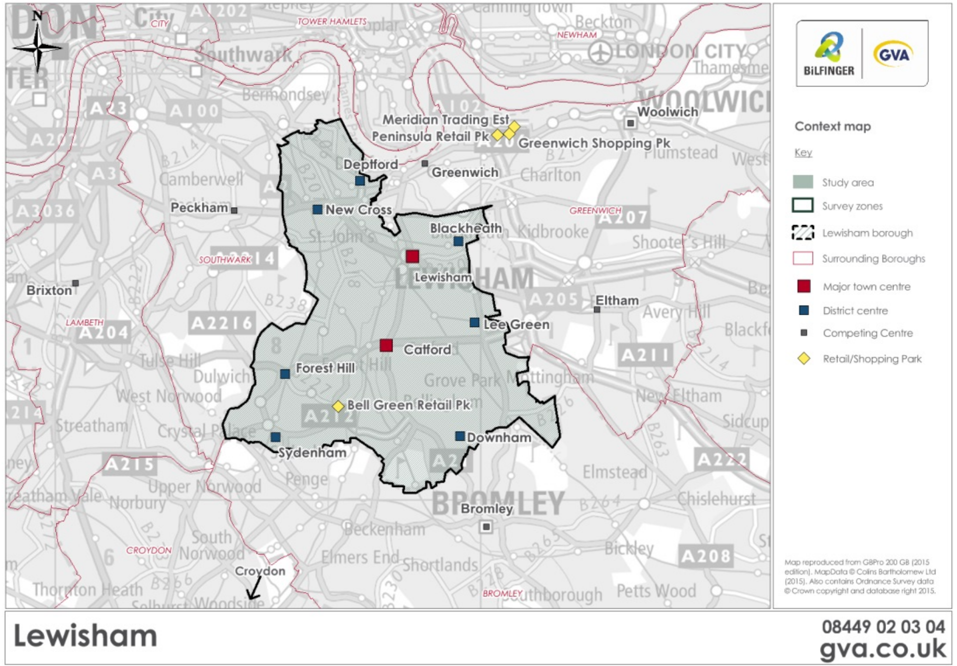
- **In this section we have established the key centres which compete for comparison goods expenditure with centres in LB Lewisham. This has been confirmed through a household telephone survey of shopping patterns, which has been undertaken in support of this study.**
- **Central London and Bromley town centre are the two principal competing destinations, claiming £290.9m and £280.3m respectively of comparison goods spending from the survey area which we have defined for the purposes of this study. Central London (which includes locations such as Oxford Street, Regent Street, Covent Garden and so on) is collectively the strongest retail location in the UK and its proximity to the Borough is such that loss of spending to this location is entirely to be expected. Central London contains flagship stores and international retailers which would not typically be expected to locate in centres in the Borough.**
- **Bromley has a retail offer which has a greater degree of overlap with that of Lewisham town centre, although the quality of the comparison goods retail offer in Bromley is generally stronger. The Intu Bromley centre in particular is a strong-performing destination, and the proposals currently underway to introduce new leisure facilities (including two cinemas and a strengthened dining offer) may help to make the centre more of a 'destination', and we therefore consider Bromley will remain a key competing centre in future years.**
- **Croydon town centre exerts less of an influence but still draws £152.3m of comparison goods spending from the survey area, although this almost exclusively from the southern zones. Croydon's retail offer is relatively strong (although it has stagnated somewhat in recent years), however should Westfield/Hammerson's proposals for the redevelopment of the Whitgift and Centrale Shopping Centres come forward, there is the potential for Croydon's attractiveness as a shopping / leisure destination to be significantly increased. Ultimately, the extent to which it exerts a greater influence over shopping patterns of residents in the survey area than at present will be dictated by the strength of the tenant line-up which any redevelopment manages to attract. Parts of the Borough are also relatively poorly connected to Croydon, which may also limit its ability to draw significant further trade when considered alongside the presence of other competing centres.**

- The retail parks on and around the Purley Way area in Croydon draw a further £75.4m of spend from the survey area, on account of particularly strong mix of retailers which includes Ikea and John Lewis at Home;
- Bluewater draws a further £102.2m of comparison goods spending, and also has proposals for further enhancement of its retail offer. Bluewater's trade draw is under 5% from the majority of the survey area but has a stronger draw from the Greenwich / Blackheath area.
- Surrey Quays, Peckham and Greenwich are the remaining competing centres, drawing between £45.9m of £81.7m of comparison goods spend from residents in the survey area. A further £87.3m of comparison goods spend goes to retail warehousing in the Old Kent Road area, which are a short distance from the New Cross area.
- Whilst it is not surprising that many residents in the Borough undertake their spending at larger/higher-order centres surrounding the Borough, many of these competing centres are advancing plans to further develop and enhance their retail and leisure offer in the short to medium term. These proposals are likely to further influence the shopping patterns of residents in the Borough and give added impetus to the need for the Borough's own Town and District centres – which we review in the following sections – to remain diverse, vital and viable.

5 MAJOR CENTRES

5.1 In order to get an accurate understanding of how the network of centres in the Borough are currently performing, in this section we provide an assessment of the 'major town centres' of Lewisham and Catford against the 'health check' indicators which Planning Practice Guidance states should be used to assess the vitality and viability of town centres. In the following section we undertake reviews of the Borough's network of district centres. The location of the centres in the context of the Borough boundary plus the wider surrounding network of competing centres is shown in **Figure 5.1.**

Figure 5.1: Major town centres & district centres in London Borough of Lewisham



5.2 Our conclusions, both for the town centres outlined in this section and the district centres in Section 6, are informed by site visits to the centre (undertaken in December 2015 and January 2016), a range of secondary data sourced including Venuescore Retail Rankings, the IGD Foodstore Database, and Experian Goad centre reports and mapping.

5.3 For Lewisham and Catford, our assessments also take into account the findings of in-centre shopper surveys undertaken by NEMS Market Research in the two town centres in December 2016. These surveys asked users of the centre a range of questions about their experience in the centre: their main purpose for visiting, what they liked and disliked about the centre, and how it could be improved. Home postcodes were also collected to allow for the extent of the centre's catchment area to be established. For surveys undertaken in Lewisham town centre, visitors were also asked about whether the regeneration works underway at Loampit Vale had changed their patterns of visits to the centre. A full copy of the in-centre survey results is provided at Volume 4 to this Study.

5.4 **Table 5.1** sets out a summary of the key retail performance statistics for each centre for ease of reference; we also provide this information for the key competing locations surrounding the Borough identified in the previous section as being the principal centres which compete for comparison goods spending with centres in the Borough.

Table 5.1: Major town centres in London Borough of Lewisham & competing centres

	Venuescore Retail Ranking (2014)	Venuescore Market Positioning (2014)	Total floorspace (sq.m net)	Number of units	Units Vacancy rate (%)	Floorspace vacancy rate (%)
Major town centres in Lewisham Borough						
Lewisham	174	Lower Middle	84,152	342	7.5%	11.3%
Catford	482	Lower Middle	58,176	242	8.5%	5.2%
*Competing centres (**see Section 4**)*						
Bromley	39	Upper Middle	138,342	495	8.9%	5.7%
Croydon	23	Middle	250,169	964	16.7%	10.2%
Bluewater	26	Upper Middle	136,455	331	5.4%	2.0%
Surrey Quays	549	Middle	47,213	143	4.2%	1.1%
Greenwich	601	Upper Middle	40,924	295	7.8%	5.3%
Peckham	307	Lower	78,550	414	7.7%	4.4%
East Dulwich	1,531	Middle	22,445	165	5.5%	4.2%
UK Averages						
UK Average (March 2016)					11.3%	9.2%

Source: Venuescore Retail Rankings (2014) / Experian Goad centre reports (dates vary)

LEWISHAM (MAJOR TOWN CENTRE)

5.5 Lewisham is classified as a 'Major Town Centre' in both the Lewisham Core Strategy (2011) and London Plan (2016), and serves as the most important shopping and leisure destination in the area as well as a major public transport hub. As we have previously discussed, to help guide how and where development should take place over the next five to ten years, the Council adopted the Lewisham Town Centre Local Plan in February 2014. At the time of preparing this study, considerable redevelopment was either complete or well advanced in the Lewisham

Gateway and Loampit Vale Town Centre Local Plan policy areas, with further development expected to come forward in the 'Central Area', Lee High Road and Ladywell policy areas.

Diversity of uses and retailer representation

5.6 Lewisham is the borough's largest retail and leisure destination, and accordingly the town centre comprises a substantial number of units. The Experian Goad category report (August 2016) identifies Lewisham Town Centre has 90,500 sq.m of ground floor retail and service (retail, leisure, and financial services units floorspace), comprising 346 units.

5.7 The town centre's proportion of comparison goods retail (33.8%) falls slightly above the national average of 31.3%. Types of comparison goods shops that are particularly well represented include clothing shops, shoe shops, jewellery stores, telephone shops and cosmetics/beauty shops. Lewisham Shopping Centre and Lewisham Retail Park house the centre's largest comparison shopping units including TK Maxx, H&M, Marks & Spencer, Sports Direct, Matalan and Mothercare (it should be noted that the retail park falls outside the Primary Shopping Area policy boundary). The two parcels of land which comprise the Lewisham Retail Park site (i.e. either side of Thurston Way) are expected to be redeveloped as high-density residential developments, but both will retain commercial floorspace at the ground floor level (approximately 4,800 sq.m in total between the two sites).

5.8 Lewisham's proportion of convenience goods retail (11.0%) also falls above the national average of 8.7%. The anchor convenience store is the Sainsbury's supermarket located within Lewisham Shopping Centre (2,220 sq.m net sales area), but the town centre also has a food hall located within the M&S store, Iceland, Lidl and a large Tesco located outside of the Primary Shopping Area to the north on Lewisham Road. This main convenience offer is supplemented by a number of independent grocers, delicatessens, butchers and bakeries. The town centre also hosts a daily market in front of Lewisham Shopping Centre containing approximately 60 stalls ranging from fruit and veg, clothing, street food and household goods and it is clear that this makes an important contribution to the wider vitality and viability of the centre.

5.9 47.8% of Lewisham's retail units are occupied by service goods operators (including retail, leisure, and financial and business services), which is in line with the national average of 48.6%. For retail service provision, there is a particularly strong representation of opticians. The proportion of leisure services within Lewisham falls slightly below the national average; however, there is an above average proportion of fast food take-aways. The town centre is well provided for in terms of sports facilities following the opening of the Glass Mill Leisure Centre which opened in June 2013 and comprises a regional-standard eight lane swimming pool with spectator seating, gym, fitness studios, climbing wall and a café. There are also other private gyms and fitness studios within the centre. In terms of financial and business services there is a high provision of employment & careers centres.

5.10 There is no cinema and this represents a major qualitative gap in the provision of the centre. There is also no theatre, with nearby Catford acting as the location for the Borough's principal offer in this respect.

5.11 Lewisham town centre has the highest proportion of national multiple retailers (operators with nine or more stores) out of any centre within the Borough. The Experian Goad category report for Lewisham identifies 133 multiple retailer-operated units within the centre, equivalent to 38% of all units within the town centre.

Vacancies

5.12 The most recent Experian Goad category report for Lewisham (August 2016) identifies 26 vacant units, equating to a vacancy rate of 7.5%. This falls below the national average of 11.2%. In terms of vacant floorspace, the category report identifies 11.3% of Lewisham's floorspace is vacant, above the national average of 9.6%. This reflects the fact that one of the largest units in the centre, the former BHS unit, remains vacant.

5.13 A noteworthy vacant unit included the corner unit on 'North Mall' within Lewisham Shopping Centre; whilst the large previously vacant unit located at 65-71 Lee Bridge Road adjacent to the Emergency Services building has been converted to residential on the upper floors and gym on the first floor. An application for a gym on the ground floor was recently refused planning permission (Ref: 16/96032). We understand that this unit is shortly due to be redeveloped for residential use with a publicly accessible gym below. No significant clusters of vacant units were recorded elsewhere, and we do not consider the current level of vacancies to be a cause for concern.

Pedestrian flows

5.14 As part of this study, PMRS were commissioned to undertake footfall surveys of both Lewisham and Catford Town Centre. The results for Lewisham identified the highest footfall recorded around the eastern entrances to Lewisham Shopping Centre and on Lewisham High Street, and the lowest footfall counts were recorded at the periphery of the centre, to the east of Lee High Road and southern end of Lewisham High Street. For full details and results please refer to **Volume 5** where PMRS' full report can be found. We also note that the results should be considered in the current context of the development underway at Lewisham Gateway which may have affected 'typical' pedestrian flow activity.

Accessibility

5.15 Lewisham benefits from being highly accessible by public transport, including Lewisham Station which is served by National Rail and Docklands Light Railway services, located to the north of the town centre. The national rail line connects Lewisham with London Cannon Street, New Cross, and stations southbound to Sevenoaks via Orpington. The DLR line terminates at Lewisham and provides services to Canary Wharf via Greenwich.

5.16 Lewisham is also connected to an extensive bus network that provides services to locations including, but not limited to City of London, Shoreditch, New Cross, Brockley, East Dulwich, Catford, Blackheath, Stratford, Vauxhall, Crystal Palace, Croydon, Orpington and Greenwich.

5.17 The town centre is also well provided for in terms of car parking spaces. A number of car parks are located around the town centre, with the largest being the Lewisham Shopping Centre multi-storey providing capacity for 800 cars.

Environmental quality

5.18 Due to the on-going construction works, the shopping environment on the northern side of the town centre is somewhat disrupted, although once completed there will be a noticeable enhancement in the environmental quality in this part of the centre. Although Lewisham Shopping Centre is somewhat dated, it still remains a reasonably pleasant place to shop, and the pedestrianised High Street and market provides a safe and easily navigable central shopping area, although there are issues of vehicular traffic from the market traders interfering with pedestrian movements during retail trading hours. Shop fronts towards the southern and eastern end of the centre could perhaps benefit from some investment (particularly on Lee High Road), but in general we consider their upkeep to be reasonable and adequate. The public realm surrounding the completed Glass Mill Leisure Centre and adjacent housing schemes is of a high quality, and a positive sign of things to come for the rest of the Gateway area.

5.19 As mentioned above, Lewisham town centre is currently subject to a large amount of development and construction works. We are aware that at the time of writing this study traffic and congestion was an issue for Lewisham, especially around the Gateway area. However, once development is complete we envisage this issue will subside and should be treated as an anomaly for this study.

Customers' views and behaviour (household survey)

5.20 The household telephone survey undertaken in support of this study asked participants whether they visited Lewisham, and if they did, asked a number of questions about their views and usage of the centre such as frequency of visits, reasons for choosing to visit and likes/dislikes about the centre. The key findings from the survey are summarised below:

- When asked what (was usually) the main purpose of their trip to Lewisham, 44% stated food shopping, and 42% stated non-food shopping, suggesting that the centre plays an important function as both a food and non-food shopping location. 3.5% of respondents stated financial services was the main purpose of their visit.
- For those who answered food shopping, 31% of those respondents stated they shopped in Lewisham once a week, whilst 21% stated twice a week and 14% stated once every two weeks.
- For those who answered non-food shopping, 41% of respondents stated they shopped in Lewisham less than once a month. 29% stated once a month, whilst 15% stated once every two weeks and 10% stated once a week. This is consistent with Lewisham's role and function as a higher-order centre.
- When asked what they like about Lewisham, 33% quoted the centre's proximity to their home, 11% quoted the good range of chain stores, 11% stated they liked the market, and 6% stated the centre is well serviced by bus/public transport.
- When asked what they dislike about Lewisham, 41% stated 'nothing', 10% stated there aren't enough shops, 10% commented on the traffic congestion (although we note the current construction works at Lewisham Gateway which are undoubtedly causing a significant impact on traffic at present). Other comments included poor environment (7%) and 5% stated Lewisham was too busy/crowded.
- When asked to provide an opinion on how they think Lewisham town centre could be improved, 28% of respondents stated there was no need to improve, 15% stated a better choice of shops, 11% responded with 'improve the appearance and environment' and 10% would like to see improved maintenance of the centre.

CATFORD (MAJOR TOWN CENTRE)

5.21 Catford town centre is the second largest centre in the borough and falls into the same hierarchical category as Lewisham town centre in the adopted Core Strategy as a 'major town centre'. The Experian Goad category report (August 2016) identifies a total of approximately 58,600 sq.m of ground floor floorspace for retail and service units, comprising 248 units. It is therefore approximately two-thirds the size of Lewisham town centre in terms of floorspace.

5.22 The Council have had aspirations for the regeneration of Catford town centre for some time, with the intention of implementing major improvements and introducing more homes, shops and other amenities. As part of this vision, in 2010 the Council purchased the Catford Centre, and it is our understanding that their intention is to completely redevelop this area along with the adjacent Milford Towers.

Diversity of uses and retailer representation

5.23 The Experian Goad category report (August 2016) for Catford identifies that 14.5% of units are occupied by convenience retail uses which is above the national average of 8.7%. The anchor stores for Catford are convenience stores, most notably the Tesco supermarket located within the Catford Centre and the Aldi store at Rushey Green. The centre also contains a Lidl supermarket, as well as numerous grocers, butchers and bakeries.

5.24 Catford's provision of comparison goods shopping is less strong than its convenience offer, with the proportion of units accounting for only 16.9% of the total compared to the national average of 31.3%. However, the comparison categories that are well provided for within Catford include furniture shops, hardware and household goods and a music shop. We consider this low proportion of comparison goods retailers should not necessarily be considered as a concern or negative feature of the centre – the floorspace meets current local needs but there is opportunity for this to be much improved in the future, as discussed later in this report.

5.25 Catford's proportion of service goods operators account for 59.7% of the overall town centre composition, which is above the national average of 48.6%. In terms of retail services provision, Catford has a particularly high representation of dry cleaners, pharmacies and opticians. The town centre also features a mix of leisure services, with an average or above average provision of cafes, theatres, restaurants and bingo halls. These high proportions do not necessarily reflect a strong qualitative offer, and in the case of Catford the poor café/restaurant offer is acknowledged in survey results (discussed later), and reinforces the low proportion of comparison goods retail floorspace in the town centre.

5.26 Catford plays an important cultural and civic role due to the Broadway theatre and Council headquarters. There is a healthy mix of multiple and independent retailers within Catford. The most prevalent multiple outlets include Tesco, Aldi, Lidl, Argos, Boots, Peacocks, Iceland and Poundland. We consider that the overall retail offer within the town centre caters for a mid-low end market, and appropriately serves its local catchment well.

Vacancies

5.27 The most recent Experian Goad category report for Catford identifies 21 vacant units, equating to a vacancy rate of 8.5% which falls below the national average of 11.2%. In terms of vacant floorspace, the category report identifies 5.2% of Catford's floorspace is vacant, which falls just below the national average of 9.6%.

Pedestrian flows

5.28 As part of this study, PMRS were commissioned to undertake footfall surveys of both Lewisham and Catford Town Centre. The Catford survey was undertaken on Friday 27th and Saturday 28th November 2015 and utilised 30 count point locations strategically placed around the town centre (for full details please refer to the report in **Volume 5**).

5.29 The highest pedestrian counts (taken as an average across the two days) were recorded on the western side of Rushey Green between the entrance to the Catford Centre and up to Peacocks. The lowest footfall counts were taken around Brownhill Road and the Catford Island Retail Park.

Accessibility

5.30 Catford town centre benefits from two adjacent train stations, Catford and Catford Bridge, which operate on two separate lines. Both services provide connections to Central London (Kings Cross St Pancras and Blackfriars from Catford; Charing Cross, Cannon Street from Catford Bridge), and southwards to Hayes, Bromley and Sevenoaks.

5.31 Bus services connecting through Catford include the 171, 124, 284 and 185 providing links with Central London, Lewisham and the surrounding local area.

5.32 Catford town centre is well provided for in terms of car parking provision. The largest car park is connected with the Catford Centre and provides capacity for 685 vehicles. In addition, the Euro Car Park at Catford Island Retail Park has capacity for c.120 cars, and the car park located to the south of the Council offices provides capacity for around 150 cars on weekends. We consider the level of car parking is greater than what would normally be expected in a town centre of this size and scale, and the Council should incorporate car parking analysis as part of any town centre strategy/development proposals. It will be important that an element of car parking remains should the redevelopment of the Catford Centre and Plassy Road Island site come forward.

Environmental quality

5.33 The environmental quality of Catford, at present, is best described as functional. The town centre has obviously not benefited from a 'facelift' in recent years. This is especially noticeable within and around the Catford Centre (including the Tesco store) which is a poor quality, run down shopping environment, albeit one where the redevelopment potential is clear. However, one noticeable improvement is that Catford Broadway has become fully pedestrianised (bar deliveries/servicing) which has gone someway in improving this area for shoppers. We consider the Catford Centre and the Plassey Road Island site as two areas within the town centre which remain in need of significant improvement.

5.34 The pavements and shop fronts are still in a reasonable and functional state, although we do recommend the Council investigate ways in which the centre's public realm could be improved. The South Circular also runs through the heart of the town centre, which gives it a somewhat fragmented feel, and also means that the centre is frequently congested with through-traffic. We are aware of ambitions to re-route the South Circular so that it forms less of a negative influence on the wider town centre environment.

Customers' views and behaviour (household survey)

5.35 The household telephone survey undertaken in support of this study asked participants whether they visited Catford, and if they did, asked a number of questions about their views and usage of the centre such as frequency of visits, reasons for choosing to visit and likes/dislikes about the centre. The key findings from the survey are summarised below:

- When asked what was usually the main purpose of their trip to Catford, 62% of respondents stated food shopping in comparison to 19% who stated non-food shopping. Catford has, therefore, a much more limited attraction as comparison goods shopping destination compared to Lewisham. Additionally, 13% of respondents who stated work (within Catford town centre) was usually the main purpose of their trip.
- For those who answered food shopping, 32% of those respondents stated they shopped in Catford once a week, whilst 21% stated twice a week and 32% stated once every two weeks.

- For those who answered non-food shopping, 48% of respondents stated they shopped in Catford once every two weeks. 24% stated twice a week, and 20% stated once a week.
- When asked what they like about Catford town centre, 30% of respondents answered that it was close to home, 15% quoted the centre's attractive environment, and 7% stated that they liked the centre's good provision of leisure facilities.
- When asked what they dislike about Catford, 41% of participants stated nothing. Interestingly, 8% of participants stated there was a lack of leisure, sports or cultural facilities within the centre, and 6% stated there isn't enough choice of shops. 7% of respondents stated they disliked the traffic congestion within the centre. A further 6% commented on the lack of parking available.
- When asked how they think Catford town centre could be improved, 22% of respondents stated there was no need to improve Catford. 19% of respondents stated they would like to see more leisure, sports and cultural facilities, and 8% would like to see more traffic free/pedestrianised areas. 15% of participants would also like to see a better choice of shops.

On-street survey findings

5.36 In addition to the household telephone survey (with results in respect of Lewisham and Catford town centre discussed as part of the respective centres' health checks above), the Council also commissioned NEMS Market Research to undertake on-street surveys of users of Lewisham and Catford town centres, The in-centre surveys differ from the household surveys in that they provide a more detailed level of understanding of users of the centres' likes and dislikes of the centre, how they access the centre, how long they spend in the centre and they extent to which 'linked trips' between different town centre uses are undertaken. The surveys also record the respondents' home postcode, which is a useful exercise in helping to establish the extent of a catchment area of a centre and whether there is any 'inflow' of expenditure from beyond the survey area.

5.37 We have considered the findings of the in-centre surveys separately from the rest of the health check analysis as the findings provide a useful comparative analysis of the very different role and function of the two town centres, as we discuss below.

Main purpose of visit

5.38 The results outlined in **Table 5.2** clearly highlight Lewisham's strong non-food shopping function, as this was the main reason for visiting for over three-quarters of respondents. In comparison, Catford's function and role clearly differs, with a much more balanced mix of reasons for people visiting the centre, including work (10%) and socialising (9%). Non-food shopping is the main reason for only one in four visits, which in part is reflective of the much weaker comparison goods offer in the centre. Food shopping accounts for a much higher number of trips, likely a reflection of the stronger offer of Catford in this respect.

Table 5.2: Main purpose of visit to Lewisham and Catford town centres

Response	Lewisham	Catford
Food shopping	11%	28%
Non-food shopping	77%	25%
I work here	2%	10%
Meeting friends/socialising	1%	9%

Source: NEMS Market Research On-Street Survey, December 2015

Duration of visit, frequency of visit and mode of travel to centre

5.39 As **Tables 5.3, 5.4 and 5.5** below demonstrate, the way Catford and Lewisham are used by people within their catchment is quite markedly different. For example, 60% of respondents stated that they visit Catford either daily or 2-3 times a week, as opposed to 20% of respondents in Lewisham. In contrast, 39% of survey participants in Lewisham stated they visited either fortnightly or monthly, as opposed to 4% in Catford.

5.40 In relation to this, 58% of survey respondents in Catford stated they would spend under an hour within the centre, compared to 35% of participants in Lewisham. In contrast, 65% of respondents within Lewisham stated they would spend between one and five hours within the centre, compared to 28% in Catford. Catford is therefore a location for frequent, relatively brief shopping trips; whereas Lewisham is more of a 'destination'.

5.41 These results are reinforced by the fact that 46% of survey participants in Catford stated that they travelled to the centre by foot, compared to 27% in Lewisham (although we note is still a relatively high proportion). Clearly, people are visiting Catford more frequently with a shorter dwell-time than Lewisham, where people are comparatively staying longer within the centre but not visiting as often within a month.

Table 5.3: Duration of visit, Lewisham and Catford town centres

Response	Lewisham	Catford
0-14 mins	3%	9%
15-29 mins	7%	13%
30-44 mins	11%	14%
45-59 mins	14%	22%
1 hour – 1 hour 30 mins	14%	7%
1 hour 30 mins – 2 hours	19%	6%

2 hours – 2 hours 30 mins	12%	10%
2 hours 30 mins – 3 hours	6%	3%
3 hours – 4 hours	10%	1%
4 hours – 5 hours	4%	1%
5 hours +	1%	10%

Source: NEMS Market Research On-Street Survey, December 2015

Table 5.4: Frequency of visit to Lewisham and Catford town centres

Response	Lewisham	Catford
Daily	5%	30%
2-3 times a week	15%	37%
4-6 times a week	7%	6%
Weekly	16%	12%
Fortnightly	17%	1%
Monthly	22%	3%
Once every 2-3 months	12%	5%
Once every 4-6 months	4%	3%
Yearly	0%	0%
Less often	3%	0%

Source: NEMS Market Research On-Street Survey, December 2015

Table 5.5: Mode of transport to visit Lewisham and Catford town centres

Response	Lewisham	Catford
Car (as driver)	19%	9%
Car (as passenger)	4%	2%
DLR	6%	0%
Bus	44%	37%
Cycle	0%	3%
On-foot	27%	46%

Source: NEMS Market Research On-Street Survey, December 2015

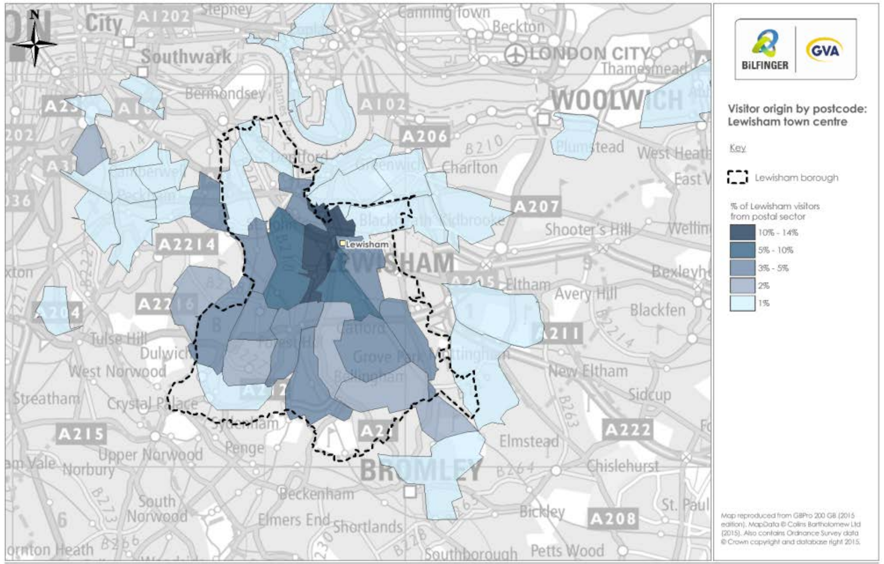
Extent of visitor catchment

5.42 The in-centre surveys recorded the home postcode of each respondent, which can be used to help inform the extent of the catchment area of each centre. The results of this exercise are shown mapped in **Figure 5.2** (for Lewisham) and **Figure 5.3** (for Catford), which shade the postcode sectors within and surrounding the Borough based on the proportion of respondents who identified it as their home location; so the darker the colour, the greater the number of respondents that live there. Larger versions of Figures 5.2 and 5.3 are provided in Volume 2.

5.43 Figure 5.2 shows that Lewisham's core catchment is largely contained within the Borough, with most respondents living the postcode sectors covering or immediately adjacent to the town centre. There are minor inflow levels from further afield (shown by the light blue shading) from areas such as Peckham, Camberwell, Greenwich, Charlton and Eltham.

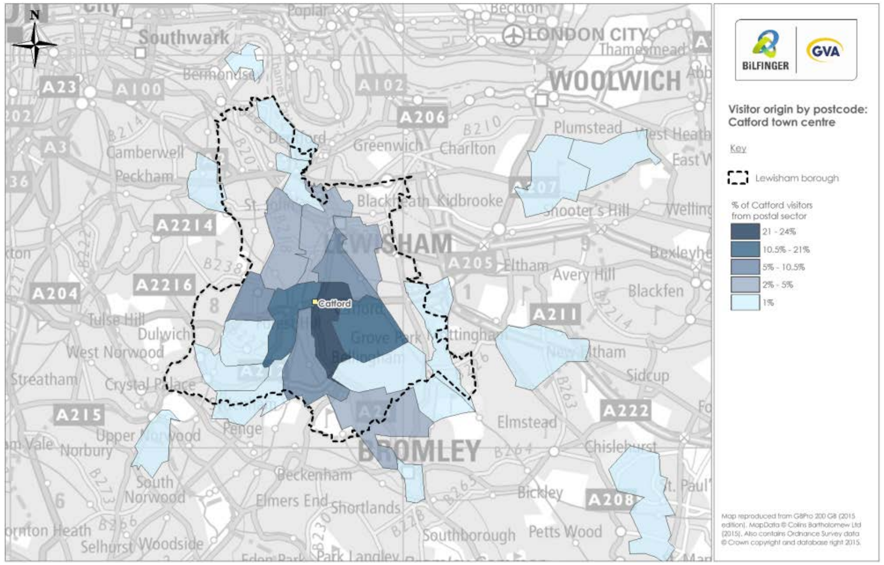
5.44 Figure 5.3 shows that Catford's catchment area is more concentrated with very little expenditure inflow from beyond the Borough, with the exception of very modest levels of inflow from north of Bromley, Eltham, Plumstead and Norwood.

Figure 5.2: Visitor origin, Lewisham town centre



Source: NEMS Market Research On-Street Survey, December 2015

Figure 5.3: Visitor origin, Catford town centre



Source: NEMS Market Research On-Street Survey, December 2015

Impact of Lewisham Gateway

5.45 For the in-centre surveys undertaken in Lewisham town centre, respondents were asked whether the redevelopment works taking place at Lewisham Gateway (as discussed above and in Section 2) had any impact on their usage of town centre, either in terms of frequency of visits or whether it changed their movement around the centre.

5.46 When asked whether or not the development works at Lewisham Gateway have changed how participants of the survey visit Lewisham town centre, 63% of respondents stated 'no change'. However, 21% stated they visited less frequently, and 6% stated that they now access the centre via a different means of transport. The findings of the above question (in respect of how respondents access the centre) therefore need to be considered with this in mind.

Attitudinal responses - Lewisham

5.47 For the participants of the survey in Lewisham town centre, when asked what they like about the centre, 29% quoted the good range of chain/well-known shops. Furthermore, 16% of respondents stated that they liked the good range of smaller independent and specialist retailers. 11% of respondents commented that they liked the layout of the town centre and the fact that the shops are all easily accessible. Interestingly, levels of satisfaction with shopping provision were higher in the on-street survey than in the household telephone survey (discussed above), in which respondents placed much greater emphasis on the convenience of the location of Lewisham town centre to their home than the quality of its retail offer.

5.48 In contrast, when asked what they dislike about Lewisham town centre, 40% stated 'nothing' (an almost identical figure to the equivalent question in the household telephone survey). Traffic congestion was a fairly common issue (12%), as well as a poor quality environment (10%), also mirroring the other key areas of concern identified in the household telephone survey. Additionally, 6% of respondents stated that it is difficult to cross streets in Lewisham, and 5% felt that there are too few cafes, pubs or eating places within the centre. Some of these responses are likely to be, in part, reflective of the redevelopment works underway in Lewisham town centre.

5.49 When asked how they thought Lewisham town centre could be improved, 33% responded with 'nothing'. 25% of respondents stated that Lewisham's overall appearance and environment could be improved and maintained better, and 12% would like to see more large department stores. A further 7% of respondents would like there to be more pubs, restaurants and cafes in the centre, and 5% would like to see a cinema in Lewisham. Many respondents therefore identify the qualitative lack of commercial leisure provision in the town centre, an issue also identified in our health check analysis, although it is expected that the proposals for Lewisham Gateway will help address this.

Attitudinal responses - Catford

5.50 For the participants of the survey in Catford town centre, when asked what they like about the centre, 9% of respondents like how compact and easy to get around it is, and 8% stated they like the layout of the centre with the shops close together. 7% of respondents stated there are good places to eat, and 8% stated they liked the good range of smaller independent and specialist retailers. These are all relatively low percentages, therefore, there is no one clear factor that respondents particularly like about the town centre. Again, the most popular factor identified in the equivalent question in the household telephone survey – that respondents like visiting Catford town centre because of its proximity to their home – does not particularly feature in the in-centre survey responses.

5.51 When asked what they dislike about Catford town centre, 28% stated 'nothing' (a lower figure than the 41% who stated this response in the household survey). 10% stated that the shops were poor quality, and 17% of respondents commented it was run down and dirty/untidy. Traffic congestion was also quoted by 8% of the survey participants. Interestingly, 13% of respondents commented on the number of disorderly people and frequency of vandalism within the centre.

5.52 When asked how they thought Catford town centre could be improved, 23% of respondents would like to see a better choice of shops, and 25% would like to see better quality shops; therefore, improvements to the retail offer in the town centre are the area which most respondents would like to see improvements. Responses concerning the retail offer feature more prominently in the in-centre results than in the equivalent question in the household telephone survey.

5.53 Other common suggestions included improving the centre's appearance/environment (16%), and improving maintenance/cleanliness of the centre (12%). 8% of the survey respondents suggested increasing the number of specialist/independent stores, and 8% would like to see more cafes, restaurants and leisure/sport/cultural facilities.

Summary

- **In this section we have undertaken an assessment of the performance of Lewisham and Catford town centres, the highest order centres in the Borough. We have assessed the performance against the 'health check' indicators set out in the Planning Practice Guidance. This is an important exercise as it assists with framing our recommendations of where the greatest qualitative 'need' for new retail and other town centre uses exists.**

- **Lewisham town centre is, for the most part, performing generally well. The conclusions set out in this section need to be considered in the context of the redevelopment works which are taking place in the town centre at present, in the Lewisham Gateway / Loampit Vale areas. The on-street surveys of users of Lewisham town centre have confirmed that these works have changed how some users visit the centre, although it is positive to note that for the majority of users the redevelopment works have not changed their patterns of visits.**

- **Lewisham's town centre retail offer is largely lower-to-middle market, but benefits from a number of strong anchor stores, particularly M&S, TK Maxx and Primark. The in-centre surveys undertaken as part of this study confirm that non-food shopping is the principal reason of visit for 77% of visitors to the town centre and therefore the presence of a strong comparison goods offer is important to the overall vitality and viability of the centre. The Sainsbury's supermarket in the Lewisham Centre is a further important key attractor, as is the market.**

- **The Lewisham Centre, whilst definitely appearing somewhat dated compared to (for example) equivalent provision in Bromley, is nevertheless functional and many of the units are of a reasonable size. A lack of larger-format units might be behind some of the expenditure loss to centres such as Bromley where units are generally larger and therefore the range of products which is able to be sold is better. The quality of the comparison goods retail offer can also be considered to be stronger in Bromley.**

- **The principal qualitative gap in the offer in Lewisham town centre is the relative lack of a commercial leisure offer. The absence of a cinema is particularly noticeable, but there are also a shortfall in cafes, casual dining restaurants and similar facilities which encourage longer periods of dwell time in a centre. The opening of the Glass Mill Leisure Centre is an important addition to the wider leisure offer of the centre, and some of the floorspace which is expected to come forward at Lewisham Gateway will be given over to the use of class A3/A4 uses, which should assist in addressing some of this shortfall.**

- **There remains a need to strengthen the offer of the southern side of the town centre, towards Ladywell, and this will likely become more pressing following the opening of Lewisham Gateway which may alter patterns of footfall and the 'retail circuit' of the centre.**

- **Positively, vacancy rates in the centre are below average and there are no major concentrations of vacant units within the primary shopping area. Some concentrations of vacancies were observed in secondary parts of the centre, particularly in the ground floor of a new development on Lee High Road, suggesting that demand for representation in secondary areas of the centre may be lower.**

- **Our health checks of Catford town centre identify that the centre has a somewhat different role and function to that of Lewisham, and the focus is much more on meeting day to day shopping needs. The in-centre survey identifies that the majority of uses of the centre visit more frequently than is the case with Lewisham, and also identifies that the principal reason for visits is to undertake food shopping trips. Whilst Lewisham is therefore more of a 'destination', Catford is more a centre of convenience and services facilities. There is a need to improve the quality and range of the retail offer of the centre, whilst not undermining these core functions which make a mostly positive contribution to the vitality and viability of the centre.**

- **Previous evidence base studies undertaken on behalf of the Council have identified that Catford town centre is underperforming and for the most part this continues to be the case.**

The focal point of the retail offer in the centre, The Catford Centre, is a dated shopping precinct which is in need of redevelopment, or at least extensive modernisation. However, the acquisition of this centre by the Council provides the opportunity for it to play an important component to the wider regeneration of the town centre. The environmental quality of the rest of the centre is largely functional, in part as a consequence of the location of the centre on the South Circular.

6 DISTRICT CENTRES

6.1 Having considered the performance of the major town centres of Lewisham and Catford in the previous section, in this section we set out a review of the vitality and viability of the second-tier district centres. As we have established in Section 2, there are seven district centres in the Borough — Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham.

6.2 We review each of these centres below, following the same format as the 'health check' assessments of the town centres in the previous section. For the majority of centres, we utilise Experian Goad Category Reports as the basis of our assessments, supplemented by our own observations from visiting the centres. Firstly, **Table 6.1** sets out a summary of the key performance statistics for each of the district centres.

Table 6.1: District centres in Lewisham

	Venuescore Retail Ranking (2014)	Venuescore Market Positioning (2014)	Total floorspace (sq.m net)	Number of units	Units Vacancy rate (%)	Floorspace vacancy rate (%)
Blackheath	1,061	Upper Middle	13,647	125	11.2%	2.6%
Deptford	1,021	Lower	33,519	228	4.0%	9.2%
Downham	2,146	Lower	8,194	73	2.7%	2.2%
Forest Hill	1,257	Middle	20,281	149	9.5%	8.5%
Lee Green	2,010	Lower Middle	11,768	69	20.3%	12.5%
New Cross	1,118	Middle	36,144	209	15.4%	8.1%
Sydenham	1,021	Lower Middle	26,366	180	9.2%	10.3%
UK average					11.2%	9.6%

Source: Venuescore Retail Rankings (2014) / Experian Goad centre reports (dates vary)

BLACKHEATH

6.3 Blackheath is defined in both the London Plan and Core Strategy as a District centre. The centre is located within the Blackheath Conservation Area and contains many attractive and well-preserved shops of varying Georgian and Victorian styles, which contribute positively to the character of the area. The centre retains something of a village-like feel (it is widely referred to as Blackheath Village) and benefits from an attractive setting on the southern edge of the 183-acre Greenwich Park, across which Greenwich town centre can be reached. The town centre serves a local function for specialist convenience goods (unusually, there is no supermarket), services and comparison goods, with the mix of uses ensuring an active frontage throughout the day and particularly during the evening on account of the presence of a noticeably high number of restaurants.

Diversity of uses and retailer representation

6.4 Blackheath district centre transcends the boundaries of LB Lewisham and LB Greenwich, although the majority of the centre falls within LB Lewisham. Experian's centre report for Blackheath (which was most recently published in May 2016) identifies the centre has 13,700 sq.m of ground floor floorspace for retail and service units (retail, leisure, and financial and business services combined), comprising 124 units.

6.5 The Experian centre report for identifies that 26.6% units in Blackheath town centre are occupied by comparison goods retailers, slightly below the national average (31.3%, September 2017); typically smaller centres such as Blackheath tend to proportionately fewer comparison goods retailers than higher-order centres such as Lewisham and Catford. Of the comparison goods offer, there is a mixture of independents and national multiples which offer primarily higher order goods. The town centre includes representation from national multiples such as Whistles, Jigsaw, Phase Eight and Fat Face. The comparison mix, however, excludes typical day-to-day national operators such as Boots, WH Smith and Superdrug, for example.

6.6 14.5% of units are occupied by convenience goods retailers, higher than that of the national average (8.7%). Although Blackheath contains above average representation of convenience retail units, there is no supermarket present in the town centre. The convenience goods offer therefore comprises a mixture of convenience stores, bakers and confectioners, a butcher, fishmonger, four grocers/delicatessens, a health food store and two off licenses. All of these are operated by independent retailers, and this represents a key strength of the centre. The quality of the convenience offer is generally high. In addition to this, every Sunday, the car park to the rear of Blackheath station hosts a local farmer's market. It can be expected that the independent offer predominantly caters for top-up shopping; the nearest larger-format supermarket to Blackheath is the Sainsbury's store in Lee Green district centre, 0.7 miles away.

6.7 Over half (55.5%) of units are occupied by service goods operators, significantly above the national average (48.5%), and therefore we would consider the offer of the centre to be strong in this respect. It is not untypical for smaller centres such as Blackheath to have a strong services offer. The centre contains an extensive number of cafes and restaurants, with a number of established national multiples represented in the centre including Gail's, Strada, Café Rouge, Giraffe, Pizza Express and Cote Brasserie and so on. A number of independent restaurants also occupy premises in the centre, and it is clear that the restaurant / dining offer plays an important role in the vitality and viability of the centre. It also means that the centre has an important function outside of retail trading hours. There are a considerable number of i public houses in the centre, including The Railway, O'Neill's Public House and The Crown, that also play an important role in contributing to the role and function of Blackheath as an evening destination. The centre contains high representation from a number of health and beauty salons as well as estate agents.

Vacancies

6.8 The most recent Experian Goad centre report (May 2016) identifies a total of five vacant units, equating to a vacancy rate of 4.0%. This is well below the current national average of 11.2% and does not present cause for concern. The 2014 Experian Goad centre report shows that 2.6% of floorspace in Blackheath is vacant compared to a national average of 9.6%, which shows that the vacant units in the centre are all small-format retail spaces, typical of the overall offer of the centre.

Environmental quality

6.9 Blackheath is an attractive and welcoming district centre, and its village-like feel is clearly apparent, and makes an important contribution to the overall vitality and viability of the centre. The common, located just to the north of the defined centre, is a focal point of the area which adds to the overall aesthetic of the environment. The predominance of large Victorian and Georgian properties also adds to the appeal of the area. The shopfronts are attractive and well maintained. The presence of restaurants and cafes provide an active street frontage and contributes to a lively evening trade. Overall, the environmental quality of the centre is an important factor of its vitality and viability, and, aligned with its boutique retail / restaurant mix, helps explain why the area is so desirable. We are satisfied that overall the centre benefits from good levels of vitality and viability.

Customers' views and behaviour

6.10 The household telephone survey undertaken in support of this study asked respondents whether they visited Blackheath town centre, and for those who do, asked a number of attitudinal questions about the frequency of visits to Blackheath town centre, the reasons for choosing to visit and likes and dislikes about the town centre. The key findings from the telephone survey are summarised below:

- 32% of respondents who use Blackheath town centre stated that daytime eating and drinking was usually the main purpose of their trip to Blackheath, and 24% stated that evening eating and drinking was the main purpose of their visit. For 17% of respondents non-food shopping was the main purpose of their trip, and for a further 17% food shopping was the main purpose of their trip. These findings confirm that the retail function of the town centre is comparatively limited. It also confirms our health check findings that the café/restaurant offer plays an important role in the vitality and viability of the centre.

- 27% of respondents stated that non-food shopping was a secondary reason why they visit Blackheath, and 18% stated that visiting restaurants was a secondary reason why they visit. For 10% of respondents food shopping was a secondary reason why they visit. The low figures for convenience goods shopping trips are a reflection of the absence of any supermarkets in the centre.

- When asked to explain what they liked about Blackheath, 39% of respondents acknowledged its attractive environment, 17% stated that it was close to home, 12% stated there were good places to eat, and 8% stated the good range of specialist/ independent stores. 10% of respondents liked that it had a village feel/friendly/good environment.

- When asked to explain what they dislike about Blackheath, 54% of respondents said 'nothing' confirming a relatively high level of satisfaction from users of the centre. 12% of respondents disliked the traffic congestion within the town centre and a further 8% complained of lack of parking. Whilst our observations indicated that there is a good supply of both on-street (outside the shops) and off-street car parking spaces, and little in the way of traffic congestion, we appreciate this is time dependent and that the centre could suffer increased congestion at peak times.

- When asked how respondents felt Blackheath town centre could be improved, 39% felt there was no need to improve the centre. 18% of respondents suggested more car parking and 7% suggested better choice of shops.

Pedestrian flows

6.11 At the time of our visit to the centre, pedestrian footfall was observed as generally strong throughout much of the centre, although noticeably higher levels of pedestrian activity were observed in the vicinity of Blackheath station, as well as along Montpelier Vale which are the centre's main shopping streets.

Accessibility

6.12 The centre is served by Blackheath station with services to London Charing Cross, London Victoria, London Cannon Street, Slade Green via Bexleyheath, Dartford via Bexleyheath and Gillingham via Woolwich Arsenal. The nearest underground station is North Greenwich, which is on the Jubilee Line, but this is some 1.4 miles from the centre. Blackheath is also served by a number of bus routes. Bus services from Blackheath station include the 53 (to Whitehall via New Cross / Deptford and Plumstead via Woolwich), 54 (to Woolwich and Elmers End via Lewisham, Catford and Beckenham), 108 (to Lewisham and Stratford via North Greenwich) and 202 (to Crystal Palace via Lee, Catford and Sydenham). The N89 night bus goes to Trafalgar Square.

6.13 Our observations indicated that there is a good supply of both on-street (outside the shops) and off-street car parking spaces. This includes two public car parks which are located to the rear of Blackheath station (160 spaces) and off of Blackheath Grove (30 spaces). Although little in the way of traffic congestion was observed at the time of the site visit, we appreciate this is time dependent and that the centre could suffer increased congestion at peak times.

DEPTFORD

6.14 Deptford is defined in the London Plan and Core Strategy as a District centre. The Experian Goad centre report for Deptford (January 2017) identifies a total of 33,700 sq.m of ground floor floorspace for retail and service units, comprising 226 units. It is the joint highest-ranking district centre in the Borough (along with Sydenham) in the Venuescore Index (see Table 6.1). Deptford has been the subject of considerable regeneration activity in recent years. Since 2008, the Council has implemented a masterplan for the town centre, developed in conjunction with several partners including the Department for Communities and Local Government, Network Rail, and London and Quadrant Housing Association. The southern half of Deptford High Street has undergone a £2.1m refurbishment, jointly funded by the GLA and Lewisham Council.

6.15 The refurbished Wavelengths Leisure Centre and the re-located Tidemill Academy now offer better educational and leisure facilities to local residents, while the Deptford Lounge provides a new focal point for community activities, offering a library, computer labs, study areas, café and room hire. Two housing-led schemes will together see over 300 new homes built in the town centre. The Council has been proceeding with its own plans to redevelop an existing estate on Reginald Road, as well as converting the old Tidemill School building into residential properties. These developments will assist in supporting the vitality and viability of the centre, through ensuring the centre meets a range of retail, leisure and educational needs of local residents.

The Albany, Deptford (picture credit: The Albany)

6.16 Deptford is also an important hub for the creative industries in south-east London, as evidenced by the presence of a number of art galleries and studio spaces, particularly around the Creekside area. Lewisham Council will also be opening a business enterprise hub in the Deptford Lounge development in April 2016, to provide incubator space for small businesses and to assist in developing a 'cluster' of creative and digital micro-businesses. The Deptford Lounge also offers a programme of creative events in association with the nearby Albany Centre, a long-established performing arts centre whose role and function has evolved in recent years to include a much broader remit of cultural activities. The Albany is currently preparing its own masterplan for the future investment in and development of its site.

Diversity of uses and retailer representation

6.17 In many ways Deptford is a typical inner-London linear High Street: fairly sprawling, predominantly occupied by the independent retail sector, with a reasonably wide range of day-to-day shopping needs able to be met.

6.18 The Experian Goad report for Deptford (January 2017) identifies that 26.8% of units in Deptford town centre are occupied by comparison goods retailers, which is below the national average of 31.3% (September 2017).. The majority of comparison units are occupied by independent retailers, with the exception of Poundland. Of the comparison goods offer, there is the highest representation from hardware and household goods stores, ladies/mens wear and accessories, textiles and soft furnishings, telephones and accessories, newsagents and stationers, DIY and home improvement stores and florists.

6.19 19.5% of units are occupied by convenience goods retailers, over double the national average (8.7%). The convenience goods offer is anchored by Asda, which opened in July 2015, replacing an existing 99p Stores unit at 5-9 Deptford High Street. The new store is a trial of a new smaller-format which Asda has recently introduced as they aim to expand into the convenience market, and was at the time of opening their second store of this smaller-format in London. This offer is supplemented by an Iceland, Tesco Express and Nisa Local, as well as over a dozen independent grocers and delicatessens, three bakers and confectioners, eight butchers, five fishmongers and two greengrocers. There is a strong emphasis on ethnic food retailing in the centre.

6.20 A key feature of the centre is a street market which operates along Deptford High Street, Douglas Way and Giffin Street. The market takes place every Wednesday, Friday and Saturday between the hours of 7am and 4pm and offers a broad mix of stalls selling items from foods and groceries to antiques and clothing. The market adds further to the diversity of uses in the centre and is an important contributor to its vitality and viability.

6.21 42.5% of units are occupied by service goods operators, which is above the national average. There is a noticeably high representation of cafes, betting offices, fast food/ takeaways, public houses and restaurants. The centre also contains a high proportion of financial services and legal services. The high street suffers from a high growth and clustering of betting shops, significantly in excess of the national average: these uses, as well as limiting consumer choice in the centre, offer little contribution to the vitality and viability of the centre, and negatively impact on the quality of the centre.

Vacancies

6.22 The most recent Experian Goad centre report for Deptford (January 2017) identifies 21 vacant units, equating to a vacancy rate of 9.3%. This is below the current national average of 11.2% but is nevertheless quite a high vacancy rate. The Experian Goad centre report shows that 9.2% of floorspace in Deptford town centre is vacant, which is in line with the national average.

Environmental quality

6.23 The centre has a rich ethnic and culturally diverse community. New artists' units and gallery space have helped to strengthen the local creative economy, improving opportunities for businesses and building upon Deptford's reputation for artistic excellence.

6.24 The environmental quality of the station and surrounding environs has been enhanced through the provision of a new train station building and the development of Deptford Market Yard, a new town centre quarter which has introduced a number of new retailers, cafes, restaurants and bars set in the railway arches adjacent to the station. Whilst this investment in the centre is clearly positive and is likely to have helped widen its demographic appeal, there is a very clear distinction between this area and the 'traditional' High Street which feels overtly stark. .

6.25 Elsewhere in the centre, whilst there is evidence of recent investment in the town centre, the aged appearance of some of the shop fronts and underutilised public realm/outdoor space still act to reinforce negative perceptions of the centre and further investment is required in this respect, particularly to the northern end of the centre.

Customers' views and behaviour

6.26 The household telephone survey undertaken in support of this study asked respondents whether they visited Deptford town centre, and for those who do, asked a number of attitudinal questions about the frequency of visits to Deptford town centre, the reasons for choosing to visit and likes and dislikes about the town centre. The key findings from the telephone survey are summarised below:

- 66% of respondents who use Deptford town centre stated that food shopping was usually the main purpose of their trip to Deptford, and 21% stated that non-food shopping was usually the main purpose of their visit. 4% stated that visiting the market was the main purpose of their trip.
- 53% of respondents stated that non-food shopping was a secondary reason why they visit Deptford, and 5% stated that food shopping was a secondary reason why they visit. A further 15% of respondents stated that using financial services as a secondary reason.
- When asked to explain what they liked about Deptford, 42% of respondents stated that it was close to home and 17% stated the market. A further 14% of respondents stated the attractive environment, 14% stated the good leisure facilities and 13% stated the good bus service.
- When asked to explain what they dislike about Deptford, 52% of respondents said 'nothing', 21% of respondents disliked the lack of parking and 19% disliked the fact that it was dirty and there was litter. We consider levels of satisfaction amongst users of the centre to be generally good.
- When asked how respondents felt Deptford town centre could be improved, 41% felt there was no need to improve the centre, 22% suggested more car parking, 12% suggested more pubs, restaurants and cafés, 8% suggested more green space, and 7% suggested better maintenance/cleanliness.

Pedestrian flows

6.27 Pedestrian flows were observed to be relatively modest throughout the centre but it appears generally well supported. The market is evidently a key driver of footfall in the centre and acts as the focus for pedestrian activity in the centre.

Accessibility

6.28 Deptford train station, which has recently undergone refurbishment, is centrally-located within the district centre and provides the centre with direct, non-stop services to London Bridge, as well as to Greenwich and onwards to stations in north Kent. Deptford Bridge DLR station is in close proximity to the south-east of the centre, with services to southbound to Lewisham and Bank via Canary Wharf. The two rail/Overground stations at New Cross and New Cross Gate are also within walking distance of the centre

6.29 Deptford is served by a number of bus routes including the 453 (Marylebone via New Cross and central London), 47 (Shoreditch via London Bridge/Catford), 53 (Whitehall/Plumstead), 177 (Peckham via New Cross/Thamesmead), 225 (Canada Water/Hither Green) and N89 night bus all pass through the centre.

6.30 The centre contains only one car park which is located off Giffin Street (approximately 100 spaces). Although little in the way of traffic congestion was observed at the time of the site visit, we appreciate this is time dependent and New Cross Road in particular is a busy thoroughfare. Overall the centre can be considered highly accessible and therefore scores positively against this indicator.

DOWNHAM

6.31 Downham is the smallest District Centre within Lewisham. The Experian Goad category report (April 2016) identifies a total of 8,200 sq.m of ground floor floorspace for retail and service units, comprising 75 units which are located along a linear high street. Despite being the smallest centre in the Borough's retail hierarchy, it still evidently serves an important role for its local catchment. The retail offer and environment remains functional and adequate for people's needs, focussing on day-to-day convenience goods shopping and services.

Diversity of uses and retailer representation

6.32 The Experian Goad category report for Downham identifies a high proportion of convenience goods retailers. Approximately 20.% of units are occupied by a convenience retail offer, over double the national average of 8.7%. This strong convenience goods offer is anchored by Co-Op, Iceland and Tesco Express supermarkets. This offer is supplemented by a Premiere convenience store, butchers, grocers, bakery and a Polish deli. Downham also benefits from an M&S Simply Food convenience store which is located within the petrol filling station at the northern end of the district centre.

6.33 Downham's proportion of comparison goods retailing (22.7%) falls below the national average of 31.3%, with a significant proportion of the comparison offer given over to charity shops. However, Downham does benefit from a music shop, sports shop and florist which appeared well used whilst carrying out our visit to the centre. As the centre lacks provision of other comparison goods retailers such as bookshops, clothing stores and shoe shops, it is assumed that people within the local area are using other centres for the majority of their comparison goods shopping, and this is consistent with the role and function of Downham as a district centre.

6.34 53.3% of Downham's retail units are occupied by service goods operators, which is above the national average. In terms of retail service provision, there is a particularly strong representation of dry cleaners and hairdressers in the centre, and we understand that the proportion of units given over to services uses in the centre has increased in recent years. In particular, Downham has an above average representation of take away outlets, of which the majority are located in a cluster towards the southern end of the centre. The high street has representation of three betting shops (Coral, Paddy Power and Betfred), which should be monitored carefully to avoid over-concentration and representation of such uses on the high street which could impact Downham's vitality and viability. Generally speaking, the quality of the services offer in the centre is downmarket.

6.35 It should be noted that, other than the key anchor convenience retailers and betting shops, the vast majority of retail units are occupied by independent traders. Overall, the good provision of convenience and service retail units, coupled with the high proportion of independent traders, all amounts to a district centre which adequately serves the local catchments everyday needs.

Vacancies

6.36 The most recent Experian Goad category report for Downham (April 2016) identifies just two vacant units, equating to a vacancy rate of 2.7%. The vacancy rate in the centre has decreased in recent years, and is significantly below the UK average of 11.2%This falls below the national average of 11.4%. In terms of vacant floorspace, the category report identifies 2.2% of Downham's floorspace is vacant, also below the national average of 9.6%.

Environmental quality

6.37 The environmental quality of Downham is best described as adequate. The centre has not benefited from the same level of investment as some of the other district centres within the borough such as Forest Hill and Sydenham, however, the shopping environment remains functional.

6.38 Shop fronts towards the southern end of the centre are arguably in the poorest condition and would benefit from some investment. In addition, the Co-op unit is rather unsightly with half of the store's frontage appearing vacant. Glazing this small stretch of the shops facade could perhaps activate the frontage.

Customers' views and behaviour

6.39 The household telephone survey undertaken in support of this study asked participants whether they visited Downham, and if they did, asked a number of questions about their views and usage of the centre such as frequency of visits, reasons for choosing to visit and likes/dislikes about the centre. The key findings from the survey are summarised below:

- When asked what was usually the main purpose of their trip to Downham, 51% of respondents stated food shopping, and 26% of respondents stated non-food shopping. 3% stated financial services, and a further 9% stated visiting family and friends as the usual purpose of their trip.
- For those who usually visit Downham to do their food shopping, 19% of participants do so five-six times a week. 27% of respondents stated they did their food shopping either two or three times a week, and 16% stated they did their food shopping once a month. The centre therefore clearly functions as a destination for frequent, repeat trips which is in line with what we would expect given the size of the centre and the composition of its offer.
- For those who usually visit Downham to do non-food shopping, 41% of participants stated they did so once a week. 26% stated once a month, and 21% stated less than once a month. In comparison, 6% stated they went non-food shopping in Downham five-six times a week and a further 6% stated twice a week.
- When asked what they like about Downham, 60% of participants stated that they liked the centre's proximity to their home. 9% stated it was easy to park, and 5% stated there were good places to eat.
- When asked what they dislike about Downham, 66% of respondents said nothing. 11% of respondents mentioned vandals/hooligans, and 4% stated there isn't enough choice of

shops. It is positive to note therefore that two-thirds of respondents are satisfied with the centre.

- When asked to consider how Downham could be improved, 30% stated there was no need for it to improve. Interestingly, 11% of respondents stated they think reducing the number of restaurants would improve the centre, as well as increase the choice/diversity of shops (6%), and providing more car parking (13%).

Pedestrian flows

6.40 During our visit to the centre, we observed relatively low to modest pedestrian activity. This was not unexpected due to the nature of the centre, although we do appreciate that pedestrian activity does fluctuate according to the day, time and conditions.

Accessibility

6.41 The closest train station to Downham district centre is Beckenham Hill, which provides services to Catford, Lewisham, Central London (c.30 mins to Blackfriars), Orpington and Sevenoaks. Beckenham Hill is located approximately 10 minutes' walk to the west of Downham district centre. Downham is also well served by local bus routes. These include the 136, 181, 208, 320 and N199 which provide services to locations such as Elephant & Castle (via New Cross and Peckham), Lewisham, Catford, Orpington and Grove Park.

6.42 Car parking provision is fairly localised with some on-street parking along Bromley Road, however, no car park of any significant size was noted during the audit of Downham. It appears as though most people were accessing the centre either by foot, bus, or parking on an adjacent residential street nearby.

FOREST HILL

6.43 Forest Hill is a busy and popular district centre, located approximately 5km south west of Lewisham town centre The centre is dissected by a railway station and the London Bridge to Brighton mainline, and comprises approximately 150 units with approximately 20,300 sq.m of retail and services floorspace. Along with nearby Sydenham, Forest Hill also benefitted from funding via the Portas Pilot scheme and currently appears to displaying positive signs of vitality and viability.

6.44 The centre also benefits from close proximity to the Horniman Museum and Gardens, an important cultural and tourism asset for the Borough. Opened in 1901, the Horniman is best known for its collection of taxidermied animals, but also has a large park with views over a London and a small urban farm. The Gardens are also used to host farmers markets and other specialist markets.

Diversity of uses and retailer representation

6.45 The Experian Goad Category report for Forest Hill (October 2016) identifies that the centre has a good provision of convenience goods units; approximately 13.5% of the units in the centre are occupied by a convenience retailer, above the current UK average (8.7%). The 'anchor' store for Forest Hill is the Sainsbury's supermarket located on London Road which also has a car park with capacity for around 100 vehicles. Other convenience retailers include a small Co-op supermarket on the opposite side of the railway line on Stanstead Road, butchers, bakery and a number of high-quality grocers and delis.

6.46 Forest Hill's proportion of comparison goods falls considerably below the national average (16.9% compared to 31.3%). However, the centre does benefit from two antique shops, two art shops and a large outdoor sports shop, 'Finches' on Perry Vale which, following discussions with the shop staff, we understand draws shoppers from a fairly wide catchment.

6.47 58.8% of retail units in Forest Hill are occupied by service goods retailers combined (including retail, leisure, and financial and business services) which is above the national average. All three of the categories are also individually above the national average. The eating and drinking offer in the centre is particularly strong (and we understand has strengthened considerably in recent years), with a number of independent venues such as the Sylvan Post Public House, Cookies & Cream and Bona Pizza, as well as the 'Capitol' Wetherspoons public house housed in a former cinema which as preserved many of the facility's original features. We understand that that J D Wetherspoon are seeking disposal of this site (although it remains trading), and this represents an important opportunity to introduce a complementary commercial leisure use – such as a boutique independent cinema for example – into the centre, which would improve provision of this type of facility for residents living in the south of the Borough. Forest Hill also benefits from the Forest Hill Pools leisure centre which includes two pools and a health and fitness suite, which re-opened in 2012.

6.48 12.8% of the units within Forest Hill are occupied by multiple retailers, including Sainsbury's, WH Smith and Barclays. However, a key aspect of Forest Hill's character is the high proportion of independent retailers which are present in the centre.

Vacancies

6.49 Forest Hill's Experian Goad category (October 2016) report identifies 14 vacant units, equivalent to a vacancy rate of 9.5% which is slightly below the national average of 11.2%. A branch of clothing store M&Co has recently ceased trading in the centre, freeing up a prominent, fairly well-sized unit in the centre.

Customers' views and behaviour

6.50 The household telephone survey undertaken in support of this study asked participants whether they visited Forest Hill, and if they did, asked a number of questions about their views and usage of the centre such as frequency of visits, reasons for choosing to visit and likes/dislikes about the centre. The key findings from the survey are summarised below:

- When asked what was usually the main purpose of their trip to Forest Hill, 53% of respondents stated food shopping, whilst only 17% of respondents stated non-food shopping. 5% stated daytime eating/drinking, and a further 5% stated financial services as the usual purpose of their trip.

- For those who answered food shopping as usually their main purpose for visiting Forest Hill, 30% of respondents stated they carried out their food shop once a week. 19% of respondents stated twice a week, 16% stated three times a week and 14% stated 5-6 times a week, as opposed to 12% who stated they go food shopping either once a month or less often.

- For those who answered non-food shopping, 35% of respondents stated they shopped in Forest Hill once a month. 30% of respondents stated once every two weeks, whilst 22% stated they either shopped two or three times a week.

- When asked what they like about Forest Hill, 47% mentioned the centre's proximity to their home. 10% of respondents commented on Forest Hill's attractive environment, 9% mentioned the quality of the shops, 8% stated that they liked the quality of the restaurants/cafes, and 13% liked the range of specialist and independent shops, which reflects one of the particular strengths of the district centre.

- When asked what they dislike about Forest Hill, 43% of participants stated nothing. 18% of respondents mentioned traffic congestion (as we set our below, the centre's location on a key junction on the South Circular is considered to compromise its environmental quality), whilst the lack of parking was another well-cited response (14%).

- When asked to consider how Forest Hill could be improved, 16% of respondents suggested a better choice of shops, 19% suggested more car parking, and 25% suggested nothing. 6% of participants commented that they would like to see more independent shops within the centre.

Environmental quality

6.51 The environmental quality of Forest Hill is fairly disparate. For example, the northern end of Dartmouth Road benefits from a high environmental quality, with well-kept, uniform shop fronts, creating one of the most attractive and unique shopping environments in the borough. In comparison, Forest Hill train station itself, and the area around Waldrum Place and Perry Vale is less pleasant and would benefit from improvement. The South Circular runs through the heart of the centre and negatively impacts the overall environmental quality of the centre on account of the high volumes of traffic running through the centre. The crossing point at the London Road/Dartmouth Road junction is also poor and requires improvement to enhance ease of pedestrian movement around the centre.

6.52 This part aside, in terms of accessibility, we consider the centre is reasonably functional to navigate as a pedestrian, however, the divide created by the trainline does provide a physical and psychological barrier between the two retail areas. Any opportunity to improve the connectivity of the centre should be welcomed, although it is acknowledged that there are limited means by which this can be achieved.

Pedestrian Flows

6.53 During our audit of Forest Hill a fairly vibrant level of pedestrian activity was noted, in particular along Dartmouth Road and London Road. Lower levels of pedestrian activity were witnessed around Perry Vale and Waldram Place. This is perhaps due to the aforementioned segregating effect of the railway line.

Accessibility

6.54 Forest Hill overground train station is located in the heart of the district centre, and dissects the centre in two. The station is served by London Overground services northbound to Canada Water, Shoreditch and Dalston, and southbound to West Croydon and Crystal Palace. Forest Hill is also served by Southern services to London Bridge. The centre is also well served by local bus routes which include the 122, 176, 185, 197 and 356 which link the centre to destinations such as Penge, Crystal Palace, Lewisham, Croydon, Peckham, East Dulwich and Sydenham as well as central London.

6.55 Other than the car park situated behind the Sainsbury's supermarket which has capacity for approximately 100 vehicles, and the car park associated with the train station with capacity for c.150 cars, there is limited availability to park within the district centre.

LEE GREEN

6.56 Lee Green District Centre lies to the south-east of Lewisham town centre and is directly linked to Lewisham via the A20 Lee High Road. As with Blackheath District Centre, the centre partly falls within the boundary of LB Greenwich, although the majority of the centre falls within LB Lewisham. Blackheath District Centre lies a short distance to the north, accessed via the B212 Lee Road. Lee High Road provides the principle approach to Lewisham town centre from the east and is characterised by smaller retail units and independent retailers. Also included within the defined district centre boundary is a large Sainsbury's store and the Leegate Shopping Centre, which opened in 1963. The Leegate has become run down over time and now sits largely vacant.

6.57 The Leegate is owned by St. Modwen, who submitted a planning application in February 2015 for the comprehensive redevelopment of the centre for a mixed-use scheme that would deliver 229 residential units located over 10,684 sq.m of commercial space, anchored by a new Asda foodstore. The Asda foodstore, with a 3,252 sq.m sales area, would act as an anchor for up to 2,323 sq.m of smaller independent shops, restaurants and cafés. A 2,044 sq.m gym, a new community centre and an education centre is also sought as part of the planning application.

6.58 The status of the planning application was still pending determination at the time of preparation this study; however if it comes forward it will deliver a substantial upgrading to the environmental quality and diversity of the retail offer in the centre. The health check assessment set out below therefore should be considered with these development proposals in mind.

Diversity of uses and retailer representation

6.59 As no Experian Goad survey of Lee Green is available, as part of this study we commissioned Experian to undertake a bespoke survey of Lee Green district centre, reflecting the London Borough of Lewisham-defined policy boundary for the centre. This work was undertaken by Experian in July 2017. This identified a total of 64 units in retail/commercial use in the centre.

6.60 The Experian Goad survey identified four units in the centre given over to convenience goods uses, equivalent to 6.3% of the total, below the UK average of 8.7%. The Sainsbury's store evidently acts as the anchor to the convenience goods offer and indeed the wider centre, and is of sufficient size (sales area of 1,750 sq.m net) that both main/bulk and top-up shopping trips can be catered for. There is also an Iceland store located within the centre. Other convenience goods provision is however limited to two independent grocers/convenience stores in the centre. There are no specialist convenience goods operators – such as greengrocers, butchers, bakers – currently trading in the centre. Whilst the provision of these type of goods can be expected to be met by the Sainsbury's store this nevertheless represents a key gap in the qualitative offer of the centre.

6.61 13 units in the centre are occupied by comparison goods retailers, equivalent to 20.3% of uses in the centre. This is some way below the UK average of 31.3%, although such a trend is not uncommon in district centres. The majority of the comparison goods offer in the centre is given over to independent operators, although a handful of national operators are present in the centre, namely Lloyds Pharmacy, Sue Ryder Care charity shop, and an Argos concession within the Sainsbury's store. In addition to these the centre offers a second pharmacy, a bookshop, a stationers, a hardware store, an optician, a party goods store, and a further charity shop. In the context of the limited size of the centre the range of comparison goods facilities can be considered reasonable. There are no clothing shops in the centre, but again this can be considered reflective of the role and function of the centre.

6.62 The majority of units in the centre are given over to retail and professional services, which account for 30 units, or 46.9% of the total. Uses in the centre include two estate agents, four cafes/restaurants, three take-aways, five hair/beauty salons, three public houses, and various professional services including a solicitors, accountants and surveyors. These type of uses therefore account for almost 1 in 2 units across the centre. All of the retail and professional services offer, with the exception of two betting shops (Coral and Betfred) comprises independent operators.

6.63 For the most part the quality of the retail offer across the centre is of poor/downmarket in nature.

Vacancies

6.64 The Experian Goad survey (July 2017) identified there to be 13 vacant units in the centre, a vacancy rate of 20.3%, which is approaching double the current UK average. Seven of the 13 vacant units are in the Leegate Centre, with the majority of the remainder located on Burnt Ash Road. The majority of vacant units in the centre are small (12 of the 13 vacant units are under 200 sq.m gross), although there is one larger vacant unit of 690 sq.m gross in the Leegate Centre. Although the conclusions in respect of vacant units need to have regard to the proposed redevelopment of the Leegate Centre, which means that most retailers trading in the centre are likely to be on short-term / temporary leases, the presence of these vacant units does however suggest that demand for representation in the centre at present appears to be limited.

The existing public square in Leegate Shopping Centre (picture credit: St Modwen)

Customers' views and behaviour

6.65 The household telephone survey undertaken in support of this study asked respondents whether they visited Lee Green district centre, and for those who do, asked a number of attitudinal questions about the frequency of visits to Lee Green town centre, the reasons for choosing to visit and likes and dislikes about the centre. The key findings from the telephone survey are summarised below:

- 96% of respondents who use Lee Green district centre stated that food shopping was usually the main purpose of their trip to Lee Green, and 2% stated that non-food shopping was usually the main purpose of their visit. This confirms the important role which the Sainsbury's store plays to the wider vitality and viability of the district centre, as confirmed in our health check assessment. It also confirms the relative lack of other uses in the district centre at the present time, particularly a reflection of the proposed redevelopment of the Leegate Centre.

- 22% of respondents stated that food shopping was a secondary reason why they visit Lee Green, and 9% stated that non-food shopping was a secondary reason why they visit. 5% stated that visiting cafés was a secondary reason why they visit, and 5% stated visiting hairdressers/beauty salons

- When asked to explain what they liked about Lee Green, 46% of respondents stated that it was close to home, 20% stated the Sainsbury's as a place to shop and 13% stated free/cheap parking. 17% stated that there was 'nothing/very little' that they liked about the centre.

- When asked to explain what they dislike about Lee Green, 36% of respondents said 'nothing'. 28% of respondents felt there was not enough choice of shops, whilst 18% of respondents disliked the poor environment. 5% of respondents felt there were too many empty shops. As identified above, there are a number of vacant units, particularly concentrated in the Leegate Shopping Centre and at peripheries of the district centre, and the environmental quality of the centre is varied. Should the proposals for the redevelopment of the Leegate Centre come forward, this will help to address a number of these areas of concern.

- When asked how respondents felt Lee Green could be improved, only 8% felt there was no need to improve the centre. 30% suggested better choice of shops, 19% suggested improved appearance/ environment, and 19% better maintenance/cleanliness. 12% suggested better quality shops, 12% suggested filling empty shops and 10% suggested more pubs, restaurants and cafés. Again many of these responses need to be considered in the context of the current appearance and performance of the Leegate Centre.

Environmental quality

6.66 The environmental quality of the centre is varied. Although the quality is reasonable for the most part, and indeed there are a number of attractive buildings within and surrounding the centre, the low grade uses which occupy the ground floor premises detract from what are, in many cases, premises of strong architectural merit.

6.67 Leegate Shopping Centre was constructed in the 1960s and is evidently in need of substantial investment to make a positive contribution to the environmental quality of the district centre. The Centre looks extremely tired, with a stark, uninviting feel, and the large number of vacant units (including a virtually unused upper floor) only serve to reinforce the poor environmental quality. The proposals for the redevelopment of the centre put forward by St Modwen will, if implemented, bring about a substantial improvement — however investment is also needed in improving the physical appearance of units in the rest of the centre, as well as the quality of the public realm and outdoor space.

Pedestrian flows

6.68 The highest levels of pedestrian activity at the time were observed within the vicinity of Sainsbury's, which appears to be trading well, whilst there was very little in the way of pedestrian activity observed in and around the Leegate Shopping Centre, which is to be expected in light of our above comments.

Accessibility

6.69 Lee Railway Station is located to the south of the defined centre, approximately ten minutes' walk via Burnt Ash Road. Trains from Lee reach London Bridge in 13 minutes, with easy access to towns such as Sidcup, Gravesend and Dartford in the opposite direction. Nearby Lewisham also offers access to the DLR. There are several buses that serve Lee Green, including the 202 (to Blackheath/Crystal Palace), 261 (to Lewisham/Bromley) and 273 (to Lewisham/Petts Wood). Car parking in the centre is provided for adjacent to the Sainsbury's and by the Leegate multi-storey car park, although the latter car park does not appear either particularly well-used and, in common with the rest of the Leegate, requires redevelopment/investment.

NEW CROSS / NEW CROSS GATE

6.70 New Cross / New Cross Gate is defined in both the London Plan and Core Strategy as a District centre. The Experian Goad boundary of New Cross does not extend to cover the whole of the boundary of the centre as defined by the Council, and therefore for the purposes of this study we have commissioned Experian to undertake additional survey work in the centre, to ensure the full diversity of uses of the centre is accurately captured. This survey work was undertaken by Experian in July 2017.

6.71 The Experian Goad report identifies a total of 45,180 sq.m gross floorspace in the centre, of which 28,680 sq.m gross is in use for retail or services, or is vacant.

6.72 The centre is predominantly linear in nature, running west to east along the A2 New Cross Road, along with a small retail park containing a Sainsbury's, TK Maxx and Dreams bed store. The Sainsbury's store sits at the rear of the retail park and is a large store which has benefited from recent internal modernisation works. The centre is particularly well connected, being served by two rail/Overground stations, as well as a number of bus routes.

6.73 New Cross Gate district centre is detached from this main concentration of retail activity and forms a separate cluster of approximately 38 units running either side of New Cross Road, about 5 minutes' walk westwards from New Cross Gate rail station. This part of the centre appears more run down that the New Cross part of the centre — the quality of the retail offer is generally weaker, and the number of vacant units appears higher, however there is evidence of investment in the centre from new businesses opening.

6.74 The presence of Goldsmith's University's main campus immediately to the south of the centre, on Lewisham Way, has a clear influence on the type of uses which predominate in the centre. The University has a student population of 8,400 people, and therefore it is inevitable that this student population influence the type and range of retail and services which trade in the centre: there is a well-developed presence of bars, public houses, nightclubs and fast-food takeaways, although from our visits to the centre it was apparent that many of these facilities are also well-used by the local residential community. The effect of the presence of these type of uses is that there is a reduction in the type of 'typical' day-to-day uses which would typically be expected to be present in a district centre, however.

Diversity of uses and retailer representation

6.75 The Experian Goad survey for New Cross / New Cross Gate (July 2017) identified that the centre comprises 273 units in total. A total of 32 units (11.7%) are given over to convenience goods retail, which is above the UK average of 8.7%.

6.76 The convenience goods offer is headed by the aforementioned Sainsbury's store, which sits towards the middle of the centre next to New Cross Gate station. The store is well-sized, with a net sales area of 3,539 sq.m, and offers a range of non-food products such as small electrical items, cookware, florists, an in-store pharmacy, CDs, DVDs, books, greetings cards and clothing. Indeed, the Sainsbury's store offers a range of goods which are not provided by specialist retailers elsewhere in the centre – albeit with a much more limited range. The store has recently been the subject of some internal modernisation works which have increased the range of non-food products in the store. The siting of the store to the rear of a large car park does however mean the store feels detached from the rest of the centre and does not particularly invite combined trips with other retailers and services in the centre.

6.77 In addition to the Sainsbury's there is a small Iceland store on New Cross Road, and a Sainsbury's Local store at the opposite end of the centre on Lewisham Way, close to the Goldsmith's campus. To the western end of the centre are small Londis and Payless supermarkets which meet basic shopping needs. These will shortly be joined by a new One Stop store, which is being created through amalgamation of a number of small units which are currently vacant.

6.78 There is a good independent convenience goods offer in the centre which includes two bakers, two butchers, a greengrocer, four grocers/delis, two off licences and 15 independent convenience stores/small supermarkets. In qualitative terms we consider the mix of convenience goods uses in the centre to be relatively strong.

6.79 There are 34 comparison goods retailers in the centre, accounting for 12.5% of all uses in the centre. This is substantially below the current UK average (31.3%) and reflects the fact that the majority of the offer in the centre is given over to retail and professional services (discussed below). There are very few national comparison goods retailers trading in the centre, with those present restricted to Dreams (beds), Harveys (furniture) and TK Maxx (clothing/homewares) stores at New Cross Gate Retail Park.

6.80 The remainder of the comparison goods offer comprises of independent retailers, including a small number of clothes shops (five in total), furniture shops, two bookshops, household goods stores, four chemists and a charity shop. The quality of the comparison goods offer is, for the most part, quite poor, trading from small, often dated-looking premises, and there are a number of gaps in the offer, including general/variety stores, photographic and optical goods, florists and footwear. It would be reasonable to assume that the majority of residents would have to travel to other larger centres for much of their comparison goods shopping, with Lewisham, Peckham and Greenwich town centres all within easy reach via bus in approximately 15 minutes (and in the case of Lewisham, via train services from New Cross station). A key qualitative gap in the centre is the absence of a larger-format general mechanise/discount store such as Poundland or Wilko, the presence of which would help address a number of the gaps in the comparison goods offer and provide enhanced choice for local residents. There is not, however, any apparent opportunity where a store of this nature could be accommodated in the centre, prior to any of the opportunity sites coming forward.

6.81 A total of 113 units in the centre are given over to retail/leisure/professional services, equivalent to 41.4% of the offer in the centre. Of particular note is the high proportion of leisure services in the centre – the Experian Goad survey identifies a total of 28 units currently in use as take-aways – 11% of all units in the centre and almost as many as the total number of comparison uses in the centre combined. The proportion of take-aways in the centre is over double the Council's Local Plan target of 5% of uses in the centre. The high number of take-aways is reflective of a wider well-developed night-time economy in the centre, which also includes 12 pubs/bars and three nightclubs. The 'Venue' nightclub occupies a prominent position in the centre and draws large crowds at weekends. The prevalent night-time economy is a reflection of the substantial student community who use the facilities in New Cross. A consequence of the high number of night-time economy uses in the centre is however a significant number of 'dead' frontages during daytime trading hours.

6.82 There are also a total of 33 hairdressers/beauty salons in the centre, and 14 estate agents. There is, therefore, considerable duplication in the retail/leisure services offer in the centre and, particularly given the shortfall in comparison goods uses identified above, diversification away from these uses would be beneficial for the overall vitality and viability of the centre.

6.83 The leisure offer of the centre has been enhanced with the recent opening of a new Curzon Cinema on the Goldsmith's Campus. The opening of this development will provide LBL with its first permanent cinema facility for 15 years[3]. Although it is located on the University campus, the cinema is be open to the public on weekday evenings and weekends, thereby providing local residents with an important new commercial leisure facility, reducing the need to travel to centres outside the Borough.

Vacancies

6.84 The Experian Goad survey identifies a vacancy rate for New Cross / New Cross Gate of 15.4%, which is above the current UK average of 11.2%. This is equivalent to 42 units in the centre. However, analysis of the Experian Goad data shows that at the time of the Experian Goad survey (July 2017), nine of the 42 vacant units were under alteration, suggesting that they had likely been let and were in the process of being modernised/fitted out. If these are deducted, the number of vacant units reduces to 33, equivalent to a vacancy rate of 12%. Whilst the investment in the centre can be regarded as positive, the proportion of vacant units remains above the UK average and therefore this indicator should be closely monitored by the Council moving forward.

6.85 The vacant units are spread throughout the centre although there is a more noticeable concentration in New Cross Gate, particularly along the western side of the road. However since our visits to the centre a number of these units have been, or are in the process of being, brought back into active use. A prominent vacant public house at the junction of New Cross Road and Queens Road has recently reopened as an upmarket new pub, and on the opposite side of the road a number of small vacant units are in the process of being amalgamated to form a new One Stop convenience store, which will improve local residents' choice in day-to-day convenience goods shopping. Elsewhere in the centre, recent openings in include a Costa coffee shop, two independent cafés, a greengrocer, barber and a speciality cake shop, suggesting demand for representation here remains strong.

6.86 The vacant units are all small-scale; the largest vacant unit in the centre is 230 sq.m gross and 29 of the 42 vacant units are under 100 sq.m gross in size. It is possible that if some of these small units were amalgamated to form larger units they would become more attractive to the market.

6.87 There is a prominent vacant site in the centre on land between New Cross Gate station and Goodwood Road (although the frontage of the site to New Cross Road is occupied by a parade of low-grade retail units). Planning permission was granted in March 2012 for the redevelopment of the site for mixed use development on the site 'to provide 3 blocks between 3-8 storeys, incorporating balconies, comprising 148 residential unit and 200 sq.m of retail (Use Class A1-A5), together with the provision of 39 car parking spaces, although this permission does not yet appear to have been implemented.

[3] Lewisham has not had a full-time operational cinema since the closure of Cannon in Catford in 2001, although Deptford Cinema, a community-run cinema on Deptford Broadway, typically shows two to three films a week and is aiming to further increase this.

Customers' views and behaviour

6.88 The household telephone survey undertaken in support of this study asked respondents whether they visited New Cross / New Cross Gate district centre, and for those who do, asked a number of attitudinal questions about the frequency of visits to the district centre, the reasons for choosing to visit and likes and dislikes about the centre. The key findings from the telephone survey are summarised below:

- 63% of respondents who visit New Cross stated food shopping was the main purpose of their trip, compared to 4% who stated that non-food shopping was usually the main purpose of their visit. Our health check assessment confirmed the non-food shopping function of the centre to be very limited and therefore this result is not surprising. 17% stated that evening eating and drinking was the main purpose of their visit. Whilst we consider the mix of convenience goods uses in the centre to be relatively strong and the Sainsbury's store clearly acts as the 'anchor store in the centre, it is evident that the presence of bars, public houses, nightclubs and fast-food takeaways also plays an important role in the vitality and viability of the centre.

- 30% of respondents stated that non-food shopping was a secondary reason why they visit New Cross, and 15% stated that food shopping was a secondary reason why they visit. For 15% of respondents public transport was a secondary reason why they visit (reflective of New Cross' particularly strong public transport accessibility.

- When asked to describe what they like about New Cross, 50% of respondents stated that it was close to home, 15% stated the presence of the Sainsbury's within the centre, and 15% of respondents liked that it had a good environment.

- When asked what they disliked about New Cross, it is positive to note that 65% of respondents said 'nothing' therefore almost two thirds of respondents are satisfied with the centre. 14% of respondents disliked the traffic congestion within the centre, and a further 9% of respondents indicated that the existing road system was problematic. As we identified in our health check findings, the width of the High Street is quite extensive, with four lanes of traffic bisecting the A2. This, coupled with a lack of pedestrian crossing points in parts of the centre, compromises pedestrian flows, and inhibits access to shops on opposite, impacting negatively on the environmental quality.

- When asked how respondents felt New Cross district centre could be improved, 45% felt there was no need to improve the centre. 16% suggested a better selection of shops and 15% of respondents specifically suggested they wished to see a Next store in the centre. As we identified in our health check findings, the centre is, for the most part, dominated by small lower order independent retailers which offer a fairly limited range and variety of comparison goods, creating a gap in the comparison goods offer in the centre. An additional 15% of respondents stated that less traffic congestion/roadworks could improve the centre.

Pedestrian flows

6.89 The centre – particularly in its central section between New Cross Gate station and the junction with Lewisham Way – feels busy and overly dominated by traffic. This, coupled with a lack of pedestrian crossing points in parts of the centre, compromises pedestrian flows and movement throughout the centre, although the majority of the retail offer is concentrated on the northern side of the centre. Pedestrian flows in the vicinity of New Cross Gate station are particularly strong, and there are particular pinch-points for pedestrian movement outside the station, and the footpath running east from New Cross Gate station along New Cross Road. The narrow width of the pavement, coupled with the high volumes of pedestrians accessing the station, waiting/interchanging at bus stops, and using shops in this part of the centre (including popular stores such as Iceland) makes for a congested pedestrian environment. The opportunity to widen pavements in this part of the centre should be explored, although clearly this needs to be balanced with the need to ensure free-flowing traffic on what is a major arterial route into central London.

6.90 The southern side of New Cross Road is generally quieter in terms of pedestrian footfall, reflecting the fewer number of ‘attractors’ on this side of the centre, in terms of retail outlets, transport interchanges and so on, although remains busy on account of the presence of bus stops throughout the centre. New Cross Gate is quieter and generally appears to have more modest levels of footfall, as well as benefiting from wider pavements meaning more space for pedestrian circulation.

6.91 There is a steady stream of pedestrian activity to and from the Sainsbury’s store on New Cross Gate Retail Park although if this store was sited more prominently relative to the rest of the retail offer in the centre there would be scope for this to be enhanced.

Environmental quality

6.92 New Cross benefits from what can be considered to be an adequate environmental quality, albeit one which is inevitably compromised by its location along the busy A2. As noted above under ‘Pedestrian flows’, much of the centre feels overly dominated by traffic and this comprises the overall environmental quality of the centre. There are likely to only be limited measures which can be taken to address this given the importance of this route as a major thoroughfare but improvements to pedestrian permeability through the centre should be explored.

6.93 The centre is heavily used but is well maintained and for the most part appears to be kept clean. There are ample bins in the centre but none of these offer recycling options. Public seating is generally limited but this is to be expected given the relatively narrow width of the pavements.

6.94 There may be scope to provide more seating, public realm enhancements, landscaping and planting in the roads which lead off New Cross Road such as Clifton Rose. There is also a parade of shops at the eastern end the centre, adjacent to the junction with Pagnell Street, which is set back from the main road and provides an opportunity to provide enhanced public realm to improve its current rather functional appearance. Towards the western end of the centre, there is scope for similar enhancements in front of the Royal Mail building at the junction of Queens Road and New Cross Road.

6.95 Buildings in the centre are generally of a good quality, although many appear in need of investment, particularly in terms of improving the quality and appearance of shopfronts, many of which are poor quality.

Accessibility

6.96 The centre benefits from a high level of accessibility by public transport. New Cross is served by both New Cross and New Cross Gate railway stations; both stations are served by London Overground and National Rail (Southeastern and Southern respectively). New Cross Gate station provides Overground services to Crystal Palace and West Croydon via Forest Hill and Sydenham to the south, and Highbury and Islington via Canada Water, Shoreditch and Dalston to the north. New Cross Gate has mainline suburban services operated by Southern, with trains running generally north to London Bridge and south to London Victoria, East Croydon, Gatwick Airport, and locations in Surrey and Sussex. Transport for London have recently confirmed that the proposed route of the Bakerloo Line extension will run to Lewisham via a stop at New Cross Gate, which if implemented will result in the accessibility of the centre being enhanced further.

New Cross Gate station

6.97 New Cross station also acts as a terminus for London Overground services from Dalston Junction, and benefits from frequent mainline suburban services operated by Southeastern. Trains here typically run north to Cannon Street and south-east to Lewisham, Bexleyheath, Hayes and Dartford. Trains run between Cannon Street, New Cross and Lewisham typically every ten minutes, with a journey time of five minutes.

6.98 A network of buses also provides services to and from the centre, including routes 21 (Lewisham to Newington Green via London Bridge / City Of London), 36 (New Cross to Queens Park via Paddington and Vauxhall), 53 (Lambeth North to Plumstead), 171 (Holborn to Catford via Camberwell), 172 (Clerkenwell Green to Brockley via Waterloo), 177 (Peckham to Thamesmead via Greenwich), 225 (Hither Green to Canada Water), 343 (New Cross to City Hall via Peckham), 436 (Lewisham to Battersea Park via Vauxhall), 453 (Marylebone to Deptford via Central London) and P13 (New Cross to Streatham via East Dulwich). The centre is also served by a number of night-bus routes. Many routes connect the centre with central London via Old Kent Road. The majority of the buses that run through the centre connect New Cross and New Cross Gate, although the two parts of the centre are easily walkable.

6.99 Sainsbury's shares a car park with TK Maxx, Currys and Dreams at New Cross Retail Park. This is the only public car parking provision in the centre (approximately 500 spaces), which, relative to the size of the centre, we would consider to be sufficient.

SYDENHAM

6.100 Located in the south-west of Lewisham, Sydenham is a relatively large district centre defined by its long, linear profile. The centre's Experian Goad category report (December 2015) identifies a total of 25,500 sq.m of ground floor floorspace for retail and service units, comprising 174 units. It is the joint highest-ranking district centre in the Borough (along with Deptford) in the Venuescore Index (see Table 6.1).

6.101 As discussed in section 2, in 2011 the government commissioned retail expert Mary Portas to conduct an independent review of the High Street's future. Following the review, the Government and Greater London Authority (GLA) allocated £2.7m to run a series of pilots trialling her recommendations for how high streets should become 'places' with a mix of activities on offer. Sydenham district centre was one of the centres that received funding for various improvement and regeneration schemes, including:

- Refurbishment and renovation of High Street shops;
- Pop up events/encouragement of 'meanwhile' uses;
- Introduction of markets; and
- Improvement of signage and provision of support to assist local businesses.

Diversity of uses and retailer representation

6.102 The Experian Goad Category report for Sydenham (December 2015) identifies that the centre has a reasonably strong convenience goods offer. Approximately 13.8% of units are occupied by a convenience retailer which is above the national average of 8.7%. The two largest convenience stores in the centre, a Co-op and Lidl supermarket are centrally located along the linear Sydenham Road. This offer is supplemented by a small Tesco Express, Nisa Local, Costcutter, PFC International Food Centre, Istanbul Supermarket, butchers, grocers and a health food store.

6.103 Sydenham's proportion of comparison goods (23.6%) falls below the national average (31.3%). However, the centre does have a noteworthy provision of electrical and durable goods stores, DIY home improvement stores and chemists. The centre is lacking in representation of clothes stores, sports shops and shoe shops, but this is not uncommon for a district centre and therefore not a particular cause for concern.

6.104 52.8% of Sydenham's retail units are occupied by service goods retailers (including retail, leisure, and financial and business services). There is a particularly strong representation of dry cleaners, health and beauty parlours and employment/careers centres. In terms of leisure services Sydenham's proportion falls below the national average on aggregate, with a below average representation of bars, pubs and restaurants but an above average representation of cafes, fast food take aways and betting offices. It was noted during the audit of the centre that the quality and quantity of the food and drink offer is somewhat higher at the western end of the High Street compared to the east.

6.105 17.8% of the units within Sydenham are occupied by multiple retailers (stores with nine or more outlets within the UK), with the remaining offer in the centre comprising of independent traders.

Vacancies

6.106 The most recent Experian Goad category report for Sydenham (December 2015) identifies 16 vacant units, equating to a vacancy rate of 9.2%, which is slightly below the national average of 11.2%. In terms of vacant floorspace, the category report identifies 10.3% of Sydenham's floorspace is vacant, slightly above the national average of 9.6%, which suggests that there are likely to be some larger-floorplate vacant units present in the centre.

Customers' views and behaviour

6.107 The household telephone survey undertaken in support of this study asked participants whether they visited Sydenham, and if they did, asked a number of questions about their views and usage of the centre such as frequency of visits, reasons for choosing to visit and likes/dislikes about the centre. The key findings from the survey are summarised below:

- When asked what was usually the main purpose of their trip to Sydenham, 52% of respondents stated food shopping, and 31% of respondents stated non-food shopping. 5% stated financial services, and a further 6% stated work as the usual purpose of their trip.

- When asked what they like about Sydenham, 17% stated they liked range of chain stores, and 9% stated they liked the range of non-food shops. In addition, 8% commented that they liked the quality of the shops within Sydenham, and 4% stated they liked how easy it is to park.

- When asked what they dislike about Sydenham, 54% stated nothing, suggesting reasonable levels of satisfaction amongst users of the centre. Traffic congestion was a re-occurring issue (14%) as well as poor environment (9%) and limited choice of shops (6%).

- The telephone survey also asked how participants thought Sydenham could be improved. 27% of respondents stated there was no need to improve the centre, whilst 14% felt the centre would benefit from a better choice of shops. 11% of participants felt that more car parking is needed.

Environmental quality

6.108 The environmental quality of Sydenham is reasonably high. The centre has benefited from a good level of investment (including the aforementioned Portas Pilot), and therefore the shopping environment is pleasant. Shop fronts towards the eastern end of the centre are in the poorest condition and would benefit from investment to upgrade their quality to reflect the rest of the centre. In addition, we consider the frontage/building housing the PFC Foodstore, Tesco Express and Post Office could be improved as it does not compliment the surrounding units particularly well. However, shop frontages at the western end of Sydenham Road appear uniform and well looked after, and the pedestrian-friendly wide pavements all contribute to a good environmental quality. No particularly noteworthy congestion was noted during the survey of the centre.

Pedestrian flows

6.109 During the centre audit, we observed relatively modest pedestrian activity throughout Sydenham district centre. This result was not unexpected due to the time of day it was (2-3 pm), and as a result we do not consider this to be any cause for concern.

Accessibility

6.110 Sydenham overground train station is located towards the western end of the district centre off Station Approach. The station is served by London Overground services to Forest Hill, New Cross, Canada Water and Shoreditch to the north, and Croydon to the south. It is also served by National Rail services to London Bridge via New Cross. Sydenham is also well served by local bus routes which include routes 75, 122, 176, 194, 197, 202, 356 and 450. These buses provide services to destinations such as Central London, Croydon, Lewisham, Crystal Palace, Peckham, Blackheath and Shirley.

6.111 Car parking provision is fairly limited with some on-street parking available along Sydenham Road; the only off-street car parking in the centre is a small surface car park accessed from Girtin Road. It appears as though most people were accessing the centre either by foot, bus, train or parking on an adjacent residential street nearby. We therefore consider the quantum of car parking available is likely to be sufficient for the centre.

Summary

- **In this section we have undertaken an assessment of the performance of Lewisham's network of district centres, which comprises Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham.**

- **The district centres vary considerably in their role and function, ranging from Blackheath, which has a particular focus on restaurants and boutique/specialist comparison goods shopping, to New Cross / New Cross Gate, which offers limited provision in the way of comparison goods shopping but has a much stronger role and function as a services, entertainment and night-time economy centre, partly on account of the presence of Goldsmith's University in the centre. The opening of a small Curzon cinema in New Cross in early 2016 further adds to the offer of the centre. Deptford has a close functional relationship with New Cross, and has a more varied retail offer which is better orientated towards meeting local day to day shopping needs. The market also plays an important contribution to the overall vitality and viability of the centre.**

- **Centres such as Sydenham and, on a smaller scale Downham, are more 'traditional' in composition, and are both anchored by small supermarkets with a range of supporting day to day shopping and services. Forest Hill also offers a reasonably good range of facilities, along with an emerging niche independent retail sector, and a good range of cafes and bars and, to the north of the centre, the Horniman Museum and Gardens, an important cultural draw for the area.**

- **Our assessment identified that Lee Green is the district centre which is evidently struggling for vitality and viability to a greater degree than any other centre in the Borough at present, although our conclusions in respect of this centre should be considered in the context of the anticipated redevelopment of the Leegate Centre which, along with the large Sainsbury's store, forms the focus of the retail offer in the centre. However, notwithstanding this, there is a clear need for the 'smartening up' of the environmental quality of the centre.**

7 SURVEY AREA, SHOPPING PATTERNS AND POPULATION & EXPENDITURE GROWTH

7.1 In this section, we introduce the key inputs which form the basis of our assessment of the 'need' for new comparison and convenience goods retail floorspace in the Borough. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs below, and the findings are subsequently set out in **Sections 8 and 9** (for comparison goods and convenience goods capacity forecasts respectively). The findings of this section should be read in association with the capacity tabulations at **Appendix I** (for comparison goods) and **Appendix II** (for convenience goods) in **Volume 2.**

Calculation of quantitative 'need'

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

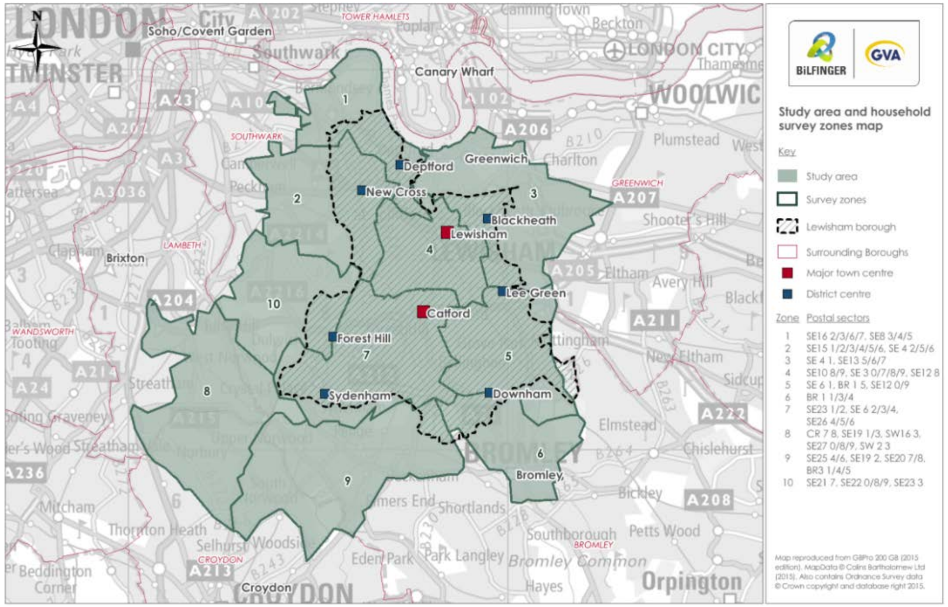
7.3 The first stage in this exercise is establishing the 'baseline' position, which is developed as follows:

- Step 1: Calculate the total population (Step 1a) and amount of convenience and comparison goods expenditure (Step 1b) which is available within the postcode sectors comprising the main centres' catchment areas; - the 'survey area'.
- Step 2: Allocate the available expenditure to the convenience and comparison goods shopping destinations visited by residents within and outside the survey area, as defined by the household telephone survey of shopping patterns;
- Step 3: Compare the total expenditure attracted to each shopping destination with the current retail floorspace to assess 'sales densities' (i.e. turnover per sq.m) in each shopping destination.

Survey Area and Household Survey

7.4 As noted above, and highlighted in previous sections of this report, in order to determine the 'need' for new floorspace a household telephone survey is required to establish the current shopping patterns of residents. In order to determine this, we have established a 'survey area', which covers LB Lewisham in its entirety, as well as parts of adjacent authorities in instances where residents may look towards centres in LB Lewisham for some of their shopping or leisure needs. A plan of the survey area is shown in **Figure 7.1** (a larger version is reproduced in Volume 2). A total of 1,000 household telephone surveys were undertaken by NEMS Market Research during August 2015. In order to enable changes in shopping patterns to be analysed, we have retained the same overall survey area as used in the Council's previous evidence base study (Nathaniel Lichfield & Partners, 2009).

Figure 7.1: Survey area



7.5 As shown in Figure 7.1, the survey area is split into ten zones, to enable differences in patterns of shopping across the survey area to be accurately captured. The LB Lewisham boundary is also shown on Figure 7.1, and it can be seen that zones 4, 5 and 7 wholly or mostly fall within the Borough, whilst zones 1, 2, 3, 6, 9 and 10 partially fall within the Borough. Survey zone boundaries have been defined by postcode sectors. The principal town and district centres within the Borough (as reviewed in Sections 5 and 6) fall within the survey zones as follows:

Zone	Town/District Centre
Zone 1	Deptford (district centre)
Zone 2	New Cross (district centre)

Zone 3	Blackheath (district centre)
Zone 4	Lewisham (major town centre)
Zone 5	Lee Green (district centre)
Zone 6	Downham (district centre)
Zone 7	Catford (major town centre) Sydenham (district centre)
Zone 10	Forest Hill (district centre)

Estimates of Population in the Survey Area (Step 1a)

7.6 For the purposes of our 'baseline' needs assessment, we have utilised population forecasts provided by Experian. These are past trends-based population forecasts. Table 1 in Appendix I shows the current and projected population for each of the zones which together comprise the survey area shown in Figure 7.1. The total current population (at 2015) in the survey area is 714,201 persons. We have used ward-based population projections provided by the Greater London Authority to calculate future population growth[4]: based on these forecasts the population of the survey area will increase to 785,261 persons by 2026 and 807,548 persons by 2033.

Available Expenditure in the Survey Area (Step 1b)

7.7 Experian identify a 'per capita' spend on comparison and convenience goods on a zone by zone basis, and these are shown in Table 2 of Appendix I for comparison goods, and Table 2 of Appendix II for convenience goods.

- comparison goods per head spend ranges considerably across the survey area, from £2,995 in zone 2 (New Cross) to £4,443 in zone 10 (Forest Hill). The average spend per head across the survey area is £3,659, which is above the UK average spend per head on comparison goods of £3,353)[5]
- convenience goods per head spend ranges from £1,713 in zone 2 to 2,348 in zone 3 (Blackheath & Greenwich), with an average spend per head of £1,977 per head. The average spend across the survey area is almost identical to the UK average convenience goods spend per head of £1,981[6]

7.8 It is expected that spend per head on comparison and convenience goods will increase over the course of the study period, based on forecasts which have been provided by Experian. Therefore, we apply an annual growth rate to the 2015 baseline figures (as summarised above), which reflects expenditure growth rate projections set out in Experian's Retail Briefing Note 13 (October 2015), as summarised in **Table 7.1**.

Table 7.1: Expenditure growth rates per annum

Year	Comparison goods expenditure growth per annum (%)	Convenience goods expenditure growth per annum (%)
2015-16	5.3%	-0.2%
2016-17	3.2%	0.1%
2017-18	2.9%	0.3%
2018-23	3.0%	0.1%
2023-33	3.2%	0.1%

Source: Experian Retail Planner Briefing Note 13 (October 2015)

7.9 The figures set out in Table 2 of Appendix I and II have been discounted to include allowance for 'special forms of trading' (SFT), such as online shopping. Experian forecast that this currently (2016) accounts for 12.4% of comparison goods spending, and 2.8% of convenience goods spending, and expect this to increase over the course of the study period to 14.7% for comparison goods by 2033, and 6.1% for convenience goods by 2033[7]. Experian forecast that comparison goods SFT will peak at 15.2% of comparison goods spending in 2022, before decreasing over the period to 2033 as the market reaches saturation, whilst convenience goods SFT will increase incrementally over the period to 2033. Table 2 of Appendix I and Appendix II summarise the 'with' and 'without' expenditure figures, and also shows the deductions we have made for SFT over the duration of the study period.

[4] The GLA dataset we have used for our analysis is the ward-based '2014 round population projections', published 27th April 2015. We have allocated each ward within the survey area to one of the ten survey zones, using a 'best fit' approach. We then calculated an overall population growth rate for each zone, based on the combined population growth of each of the wards within each survey zone, and applied this to the base-year Experian population figure for that zone. The dataset can be viewed at — http://data.london.gov.uk/dataset/2014-round-population-projections/resource/07a22673-64ae-4456-8f73-39ddb593b6e1

[5] All figures are for 2016, at 2013 price base

[6] All figures are for 2016, at 2013 price base

[7] Experian Retail Planner 13, October 2015, Figure 5

7.10 By applying the population forecasts to the per capita expenditure forecasts, we can gain an understanding of the total amount of spending on comparison and convenience goods which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period, when using the baseline Experian forecasts:

- There is currently (at 2016) £2,251.6m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £4,134.7m by the end of the study period (i.e. 2033), equivalent to a growth in comparison goods spending of £1,881.3m; and
- There is currently £1,356.3m of convenience goods expenditure available to residents of the survey area, which is expected to increase to £1,492.8m by the end of the study period, equivalent to a growth in convenience goods spending of £136.5m. The growth in convenience goods spending is therefore considerably more limited than that of comparison goods spending; this is on account of the much lower expenditure growth currently being forecast in the convenience goods sector by Experian.

7.11 Lewisham town centre attracts the highest comparison goods turnover of any of the centres in the survey area, at £336.5m, followed by Bromley (£281.1m), Surrey Quays (£82.5m), Peckham (£55.3m), Greenwich (£45.9m) and Catford (£42.5m).

Shopping patterns in the Survey Area (Step 2)

7.12 The household telephone survey results identify shopping habits of households for both convenience and comparison goods, as well as commercial leisure spending (which we discuss separately in Section 10 of this report). For convenience goods, the household telephone survey included questions on ‘main food’ and ‘top-up food’ shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% ‘main’ food / 30% ‘top-up’ food[8]). This forms a ‘composite’ pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

7.13 For comparison goods, the household telephone survey included questions on where respondents normally undertake shopping for the following types of comparison goods shopping:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

7.14 Shopping patterns for each of these types of comparison goods are then combined to produce a ‘composite’ set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type base on the proportion of personal spending (‘expenditure per capita’) available to residents in the survey area.

Comparison goods shopping patterns

7.15 Shopping patterns derived from the household telephone survey allow us to calculate the amount of comparison goods expenditure which each centre within and surrounding the study area which forms the basis of our assessment. This indicator is a good reflection of both the strength of the retail offer in a centre, as well as its accessibility, and overall quality of experience. The total amount of expenditure which is retained within a study area is known as its ‘retention rate’. **Table 7.2** shows the amount of comparison goods expenditure which is retained by centres in the Borough, and the amount which is spent at other destinations within and surrounding the study area.

Table 7.2: Comparison goods expenditure retention in LB Lewisham

	£m	% of total
Total amount of comparison goods spend available to study area (2016), of which:	2,251.6	100.0%
— Comparison goods trade draw to centres in LB Lewisham (Town Centres, District Centres, out-of-centre and non-food floorspace in foodstores)	*616.9*	*27.4%*
— Comparison goods trade draw to other survey area centres (e.g. Bromley, Surrey Quays, Peckham, Greenwich)	*559.9*	*24.9%*
— Comparison goods trade draw to locations outside survey area (e.g. Central London, Croydon, Bluewater)	*992.0*	*44.1%*
— Comparison goods spending in local shops in survey area	*82.8*	*3.7%*

Source: Table 5, Appendix II

[8] Based on our experience elsewhere, this represents a suitable split between ‘main’ and ‘top up’ food shopping.

7.16 Our assessment has identified that there is a total of £2,257.4m of comparison goods expenditure which is available to the study area. Of this, Table 7.2 shows that £618.4m is retained by centres and stores in LB Lewisham, which is equivalent to a 'retention rate' of 27.4%. **Table 7.3** sets out the most popular destinations for comparison goods spending in the survey area, identifying the extent to which facilities outside the Borough compete for expenditure with the network of centres in LB Lewisham (building on the analysis previously set out at paragraph 4.2).

Table 7.3: Study area comparison goods trade draw by centre

Centre	Borough	Comparison goods turnover from study area (£m)	% of total comparison goods expenditure available to survey area
Lewisham town centre	**Lewisham**	**336.5**	**14.9%**
Central London	Various	290.5	12.9%
Bromley town centre	Bromley	281.1	12.5%
Croydon town centre	Croydon	151.2	6.7%
Bluewater	Dartford	102.0	4.5%
Old Kent Road (retail w'housing)	Southwark	87.8	3.9%
Surrey Quays	Southwark	82.5	3.7%
Purley Way (retail warehousing)	Croydon	74.9	3.3%
Bromley Road (retail w'housing)	**Lewisham**	**61.3**	**2.7%**
Peckham	Southwark	55.3	2.5%
Greenwich	Greenwich	45.9	2.0%
Bell Green (retail warehousing)	**Lewisham**	**45.2**	**2.0%**
Catford town centre	**Lewisham**	**42.5**	**1.9%**
Sydenham district centre	**Lewisham**	**38.4**	**1.7%**
Penge	Bromley	38.2	1.7%
Charlton (retail warehousing)	Greenwich	37.3	1.7%
Brixton	Lambeth	34.9	1.5%
Beckenham	Bromley	30.6	1.4%
Forest Hill district centre	**Lewisham**	**30.6**	**1.4%**
Streatham	Lambeth	29.8	1.3%

Source: Table 5, Appendix I. All comparison goods destinations with turnovers in excess of £30.0m shown.

7.17 Table 7.3 shows that the most popular destination for comparison goods spending in the survey area is Lewisham town centre, which draws £336.5m or 14.9% of total available comparison goods spend. This reflects Lewisham's generally strong comparison goods offer (albeit one with scope for further improvement) which we have identified in our health check of the centre in Section 5. Lewisham's principal competition for comparison goods spending comes from Central London and Bromley town centre, which draw 12.9% and 12.5% of total comparison goods spend from the survey area, equivalent to £290.5m and £281.1m respectively. Combined, the comparison goods spend directed to Lewisham, central London and Bromley town centres accounts for over 40% of all comparison goods spending of residents in the study area.

7.18 Behind these centres are a 'second tier' of locations which account for a lower but nevertheless significant proportion of comparison goods spending, with Croydon town centre drawing £151.2m of comparison goods spending (a further £74.9m is spent at retail parks in the Purley Way area of Croydon) and Bluewater drawing £102.0m of spending.

7.19 In terms of comparison goods shopping destinations within the Borough, the second and third-highest locations in terms of comparison goods turnover are both retail warehouse parks facilities, with Bromley Road (near Catford) drawing £61.3m of comparison goods spend and Bell Green (Sydenham) drawing £45.2m of comparison goods spend. These two locations are then followed by a number of centres which all draw comparison goods turnovers in the region of £30-£40m, including the district centres of Sydenham (£38.4m) and Forest Hill (£30.6m).

7.20 Catford town centre has a comparison goods turnover of £42.5m which is only marginally in excess of that of the comparison goods turnover of Sydenham district centre (£38.4m). This reflects the more limited role and function of the centre as a comparison goods shopping destination, notwithstanding Catford's categorisation as a 'major town centre'.

7.21 The other district centres in the Borough (New Cross, Deptford, Downham and Blackheath) have lower comparison goods turnovers (i.e. below £30m), with both Blackheath and Deptford each drawing under £10m of comparison goods spend from the survey area. Again, this reflects the fact that these centres generally have a limited comparison goods shopping function which draws from a fairly small catchment.

Convenience goods shopping patterns

7.22 Convenience goods shopping is a more localised activity, and people are generally less willing to travel significant distances to undertake shopping for food goods. The largely urban nature of the survey area means it is generally well provided for in terms of foodstores and the household survey results identify that there is relatively little in the way of expenditure flows outside the survey area (and of that expenditure which is spent outside the survey area, most only travels short distances to locations such as Charlton and Bromley).

7.23 Our assessment has identified that there is £1,589.4m of convenience goods expenditure available to residents in the survey area; of this £641.4m is spent at stores within LB Lewisham, which are either foodstores located in town / district centres (for example, Sainsbury's in Lewisham town centre, Tesco in Catford town centre, or Sainsbury's in Forest Hill district centre), or standalone foodstores in out-of-centre (for example, Tesco in Lewisham or Sainsbury's at Bell Green, Sydenham).

7.24 From our qualitative assessment, we have identified that most parts of the Borough are generally well-provided for in terms of foodstore provision. The two highest-order centres of Lewisham and Catford both have supermarkets in prominent locations in their respective centres, although the Tesco store in Catford is a dated store and does not appear to be particularly heavily used as a main food shopping destination. Lee Green, New Cross and Forest Hill district centres are all anchored by large Sainsbury's stores, and Downham, Deptford and Sydenham district centres all have smaller-format foodstores centrally located within their centres. The only centre with a noticeable lack of foodstore provision is Blackheath, and it appears that many residents here look towards the Sainsbury's in Lee Green (which is one of the largest supermarkets in the Borough) for their food shopping.

7.25 **Table 7.4** summarises the most popular foodstores in the Borough, based on turnover derived from the survey area. It should be noted that in some cases the catchment of the foodstore may potentially extend beyond the boundaries of the survey area in instances where the foodstore is located close to the edge of the survey area, and therefore the household survey does not capture the full turnover of these stores.

Table 7.4: Turnover of main foodstores in LB Lewisham

Foodstore	Convenience goods turnover from survey area (£m)	Sequential location (in/ edge/ out-of-centre)
Sainsbury's, Bell Green, Sydenham	87.8	Out-of-centre
Sainsbury's, Lee Green	74.5	In-centre
Sainsbury's, Lewisham Centre, Lewisham	62.5	In-centre
Tesco, Lewisham	48.8	Edge-of-centre
Sainsbury's, Forest Hill	40.7	In-centre
Sainsbury's, New Cross Gate Retail Park, New Cross	22.7	In-centre
Aldi, Catford	21.1	In-centre
Marks & Spencer (food hall), Lewisham	20.9	In-centre

Source: Table 5, Appendix II. All foodstores with a turnover from the survey area in excess of £20.0m shown.

Other inputs into the quantitative need assessment

Sales Efficiency

7.26 It is also necessary to factor in changes in respect of 'sales efficiencies'. These represent the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service chargers) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail capacity studies. Although Experian (who are the data providers for the other technical inputs into this study) do not provide clear guidance on sales densities, it is fair to assume that as Experian anticipate that personal spending on both comparison and convenience goods will increase over the study period, so will sales efficiency. Informed by Experian's expenditure growth forecasts[9], we have therefore adopted the following sales efficiency growth rates:

- **Comparison goods:** 1.65%, per annum;
- **Convenience goods:** 0.1%, per annum

Floorspace Data

7.27 The comparison and convenience goods floorspace data which we incorporate into our model has been drawn from a range of data sources, including the Institute of Grocery Distribution (IGD), Experian Goad, the Trevor Wood Retail Warehouse Database, and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

[9] Experian Retail Planner 13, October 2015, Figure 1a

Summary

- In this section we have set out the methodology behind the calculation of quantitative 'need' for new comparison (non-food) and convenience (food) goods, which we undertake in the following section.
- The need assessment is informed by an assessment of shopping patterns over the study area shown in Figure 7.1, which covers LB Lewisham in its entirety, as well as parts of neighbouring authorities where centres' in the Borough's catchments are likely to extend into. However, the quantitative 'need' figures which we set out in the following section solely relate to LB Lewisham.
- The total current population (at 2016) in the survey area is 722,174 persons, based on forecasts provided by Experian. Using ward-based projections from the Greater London Authority, we estimate the population of the survey area will increase to 785,261 persons by 2026 and 807,548 persons by 2033 (the end of the study period).
- There is currently £2,251.6m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £4,134.7m by the end of the study period (i.e. 2033), equivalent to a growth in comparison goods spending of £1,883.1m.
- Of the £2,251.6m of comparison goods expenditure which is available to the survey area, £616.9m (27.4%) is spent in centres and stores in LB Lewisham. This is considered to represent a reasonable performance in the light of competition from larger surrounding centres (including, most significantly, central London). However, it is considered that there is potential for a greater proportion of comparison goods expenditure to be 'retained' in the Borough should a strengthened comparison goods retail offer in Lewisham town centre come forward.
- The findings of the household telephone survey confirm that alongside Central London, the principal other competing comparison goods shopping destinations outside the Borough are Bromley town centre, Croydon town centre and Bluewater, all of which draw upwards of £100.0m of comparison goods turnover from the survey area.
- Of the £616.9m comparison goods expenditure retained in the Borough, the majority (£336.5m) is spent in Lewisham town centre, which has the highest comparison goods turnover of any centre in the Borough by some margin, reflecting its relatively strong comparison goods offer (albeit one which has scope for improvement). The second and third highest comparison goods turnovers of locations in the Borough are accounted for by retail parks at Bromley Road (Catford) and Bell Green (Sydenham).
- Catford is currently under-performing as a comparison goods shopping destination and this is reflected in its comparison goods turnover of £42.5m, almost one-tenth that of Lewisham. Indeed, its comparison goods turnover is not significantly in excess of that of the strongest performing district centres' comparison goods turnover.
- There is currently £1,356.3m of convenience goods expenditure available to residents of the study area, which is expected to increase to £1,492.8m by 2033, a growth in convenience goods spending of £136.5m.
- Of the £1,356.3m convenience goods expenditure available to residents of the study area, £547.6m (40.4% is retained by stores within Lewisham Borough). With the exception of Blackheath, each of the town and district centres in the Borough is served by at least one foodstore, which, particularly in the case of the district centres, typically acts as the 'anchor' to the wider retail and leisure offer in the centre. There are also a number of out-of-centre foodstores, the largest of which – Sainsbury's at Bell Green – attracts a convenience goods turnover of £87.8m.
- 'Special forms of trading' – which is mostly accounted for by online shopping – is expected to account for a maximum of 15.2% of total comparison goods spending and 6.4% of convenience goods spending over the course of the study period to 2033. The expenditure growth figures set out above take the most recent SFT forecasts (also provided by Experian) into account.

8 COMPARISON GOODS CAPACITY FORECASTS

8.1 In the previous section we have set out the key inputs into our quantitative 'need' assessment. This section now progresses to identify the quantitative comparison goods (non-food) capacity forecasts for the Borough — that is, the 'need' for new floorspace which we recommend the Council should plan for in its future Local Plan, based on the methodology we have set out in the previous section. The convenience (food) capacity forecasts follow in **Section 9**. The discussion in this section should be read in conjunction with the data tables in Appendix I of Volume 2 to the study.

Shopping patterns by centre

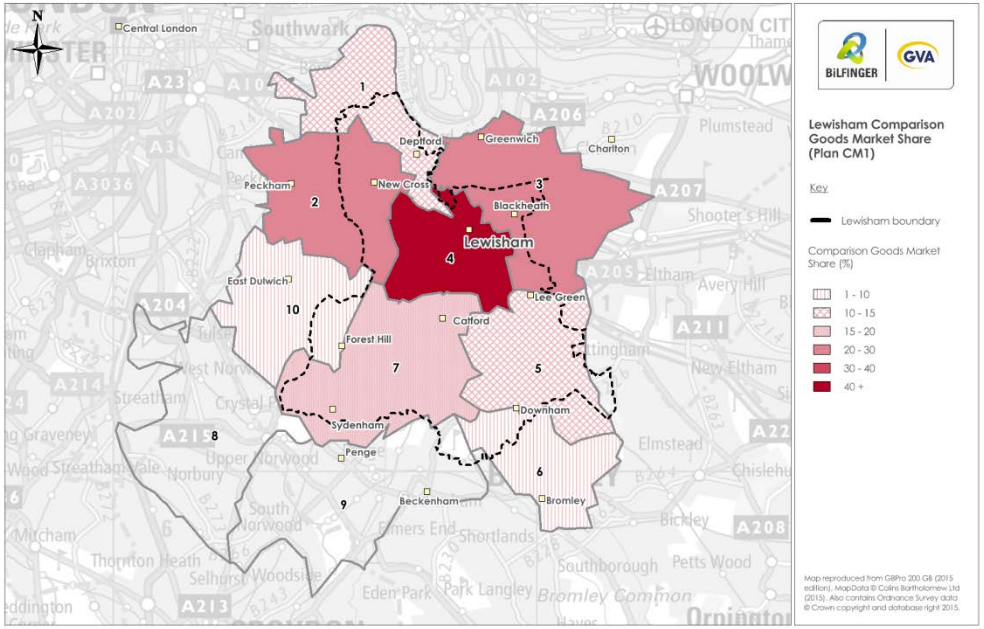
Lewisham town centre

8.2 As we have set out in the previous section, Lewisham town centre has the highest comparison goods turnover of any of the centres in the survey area, drawing £336.5m of comparison goods spend from the survey area — equivalent to 14.9% of total comparison goods expenditure which is available to the survey area. Lewisham draws comparison goods spend from each of the zones in the survey area, although its trade draw from zones 8 and 9, where residents are generally better related to Croydon, is weaker.

8.3 Lewisham town centre draws particularly from its 'local' zone (i.e. the survey area zone which the town centre falls within), which is zone 4. From this zone, Lewisham town centre accounts for almost £1 in every £2 spent on comparison goods spending, with a market share of 47.1%. Lewisham town centre also draws strong market shares from zone 2 (27.7%) and zone 3 (21.1%) and therefore we would consider these zones to represent Lewisham town centre's 'core catchment' area. Within this core catchment area, Lewisham's main competition is generally central London, which attracts a market share of between 11.7% and 14.1% from zones 2, 3 and 4, although Peckham (13.1%) and the retail warehousing on Old Kent Road (16.8%) are also popular shopping destinations for residents in zone 2.

8.4 Lewisham town centre draws a comparison goods market share of between 10 and 20% from a further three zones (zones 1, 5 and 7), and therefore these zones can be considered to represent Lewisham town centre's 'secondary catchment' area. In these secondary areas, Lewisham faces greater competition for comparison goods spending from competing destinations – namely Surrey Quays in the case of zone 1, and Bromley in the case of zones 5 and 7.

Figure 8.1: Lewisham town centre comparison goods catchment plan



Source: household survey results

8.5 It is positive to note that Lewisham has cemented its position as the principle comparison goods shopping destination in the northern part of the survey area in recent years. By comparing the comparison goods market shares identified in the household survey with those from the Council's previous retail study, it can be seen that Lewisham town centre has increased its market share in each of the core catchment zones (zones 2, 3 and 4), in each case quite substantially — most significantly an 18 percentage point increase from its local zone (zone 4). This suggests that there has been an improvement in the retail offer (and potentially the wider attractiveness of the town centre) subsequent to completion of the previous study. There have also been increases in the proportion of comparison goods spend captured from the secondary catchment area zones (zones 1, 5 and 7), although these increases are more modest.

8.6 **Table 8.1** summarises the change in market share from Lewisham's core and secondary catchment areas between 2009 and 2015.

Table 8.1: Lewisham town centre comparison goods market share – 2009 & 2015

	Lewisham town centre 'core catchment' zones			Lewisham town centre 'secondary catchment' zones		
	Zone 2	Zone 3	Zone 4	Zone 1	Zone 5	Zone 7
Comparison goods market share from zone, 2009 (%)	16%	12%	29%	12%	8%	10%
Comparison goods market share from zone, 2015 (%)	28%	21%	47%	14%	12%	17%
Change in market share, 2009-2015 (%)	**+12%**	**+9%**	**+18%**	**+2%**	**+4%**	**+7%**

Source: Table 4, Appendix I (for 2015 figures) / Table 3E, Appendix E of 2009 Study (for 2009 figures). Note – 2009 Study only presents % market shares to one decimal place and therefore figures from Table 4, Appendix I have been rounded.

8.7 Whilst the comparison goods catchment area of Lewisham is naturally curtailed by the presence of Bromley and Croydon to the south, the trends shown above show there is potential for the centre to act as a key shopping destination for most of the Borough and adjacent areas. As we set out later in this report, the further enhancement of the comparison goods in the town centre (reflecting a requirement identified in our health check analysis) could be expected to result in further improvements to the comparison goods market share attracted to the town centre in future years. This will need to be reviewed throughout the Local Plan period.

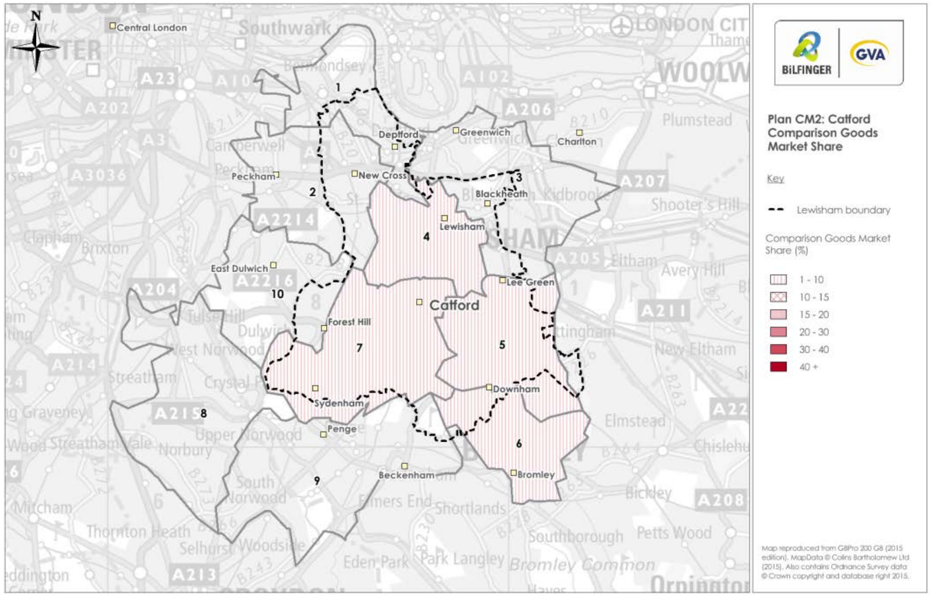
Catford town centre

8.8 Our health check analysis has confirmed that Catford's comparison goods function is much more limited than that of Lewisham, both in terms of the quantum of floorspace and breadth and quality of its retail offer. This is reflected in the household survey results which show that Catford has a comparison goods turnover of £42.5m, compared to Lewisham town centre's comparison goods turnover of £336.5m. The comparison goods turnover of Catford is comparable to some of the larger district centres in the Borough, despite the fact that Catford is classified as a 'major town centre'.

8.9 Catford's catchment area is therefore much more restricted than that of Lewisham's. The highest market share it attracts is from its 'local' zone (zone 7), from which it attracts a market share of 7.5%. There are smaller market shares attracted from zone 5 (5.7%) and zones 4 and 6 (2.4% and 2.8%) respectively. The small size of the market shares attracted to the town centre mean it is not possible to define a 'core and 'secondary' catchment area as we have with Lewisham town centre.

8.10 Catford town centre falls within zone 7. As noted above, the centre draws a market share of just 7.5% from this zone, and is losing market share to Lewisham (17.0% market share) – although the close proximity of Lewisham and Catford town centres means expenditure flows between the two centres are, and will continue to be, inevitable. Aside from Lewisham, comparison goods spending by residents in zone 7 is split between a number of destinations, including Sydenham (which attracts a higher market share than Catford, at 11.3%), Bromley (19.0%) and retail warehousing at Bell Green (10.4%).

Figure 8.2: Catford town centre comparison goods catchment plan



8.11 Catford's comparatively low comparison goods market share is not unexpected — the 2009 Study identified similarly low levels of expenditure flows. However, it can be seen from the results of the new household survey that Catford town centre has lost market share from all of the zones within the survey area relative to the position in 2009 **(Table 8.2)**. This affirms the findings of our health check assessment that there is a clear need to improve comparison goods retail provision in Catford town centre, in order for the centre to better respond to the needs of local residents.

Table 8.2: Catford town centre comparison goods market share – 2009 & 2015 (selected zones)

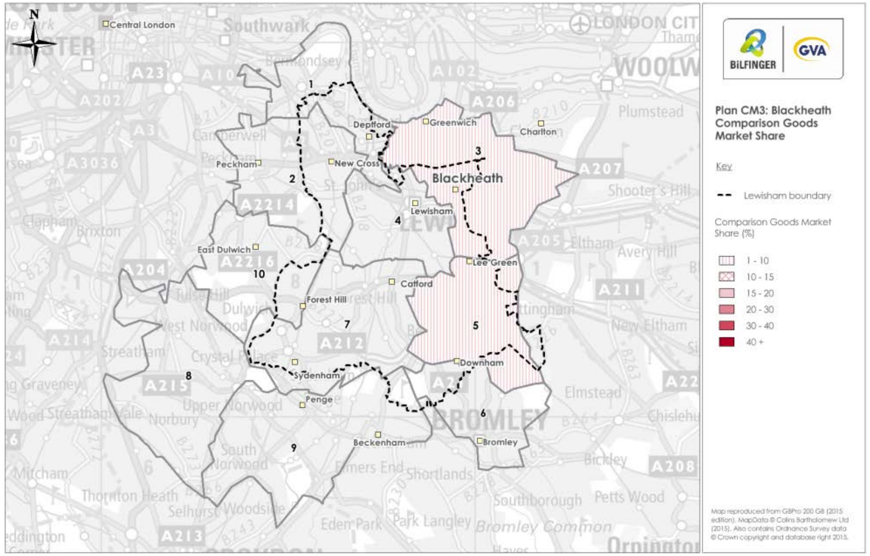
	Zone 4	Zone 5	Zone 6	Zone 7
Comparison goods market share from zone, 2009 (%)	4%	10%	4%	9%
Comparison goods market share from zone, 2015 (%)	2%	6%	3%	8%
Change in market share, 2009-2015 (%)	**-2%**	**-4%**	**-1%**	**-1%**

Source: Table 4, Appendix I (for 2015 figures) / Table 3E, Appendix E of 2009 Study (for 2009 figures). Note – 2009 Study only presents % market shares to one decimal place and therefore figures from Table 4, Appendix I have been rounded. All zones where Catford's market share was greater than 3% in 2009 Study shown in table.

Blackheath district centre

8.12 Our health check assessment of Blackheath has shown the centre to have a relatively limited comparison goods function, with the offer largely restricted to specialist / higher-end clothing and homeware boutiques. Whilst this is offer contributes to the vitality and viability of the centre because it helps provide a differentiated product offer compared to many of the other centres in the Borough and indeed assists in making Blackheath a 'destination' in its own right, it also means that the comparison goods turnover of the centre is relatively low, at £6.8m. Blackheath draws £3.8m of comparison goods spend from its 'local' zone, zone 3, plus a further £1.7m from zone 5.

Figure 8.3: Blackheath district centre comparison goods catchment plan



8.13 As would be expected given the relatively close proximity of the two centres, the main competition for comparison goods spend is from Greenwich, which also falls within zone 3, and draws £23.3m of comparison goods spend from residents in the zone, as well as Bluewater (£47.4m) and Central London (£31.0m), although clearly the offer in the latter two locations is different in terms of the composition and scale of the retail offer, and therefore Blackheath's role can be seen as one which is complementary to that of the higher order centres.

Forest Hill & Sydenham district centres

8.14 Forest Hill and Sydenham are located close to one another in the south-west of the Borough and given the overlap in catchment areas we consider both centres together:

- Forest Hill falls within zone 10, on its border with zone 7, and has a comparison goods turnover of £30.6m, drawing trade relatively evenly from zone 7 (£16.3m) and zone 10 (£13.6m); its catchment does not extend beyond this. Its comparison goods offer is a mixture of a handful of national operators alongside a strong and emerging independent sector along Dartmouth Road.
- Sydenham falls within the south western portion of zone 7 and has, at £38.4m, the highest comparison goods turnover of any of the district centres in the Borough; of this £38.4m turnover, the majority (£31.5m) comes from its 'local' zone, zone 7.

8.15 Residents in zones 7 and 10 undertake their comparison goods shopping in a wide variety of destinations with strong comparison goods offers, including Bromley, Croydon and Central London, and therefore the comparison goods turnovers of both Forest Hill and Sydenham can be considered strong performances. In addition to the above competing locations, many residents in zone 7 also look towards retail parks in Croydon (Bromley Road) and Sydenham (Bell Green) for their comparison goods shopping, and these locations draw £13.4m and £28.6m comparison goods spend from zone 7 respectively. The influence of these retail parks' is more limited over residents in zone 10.

Figure 8.4: Forest Hill district centre comparison goods catchment plan

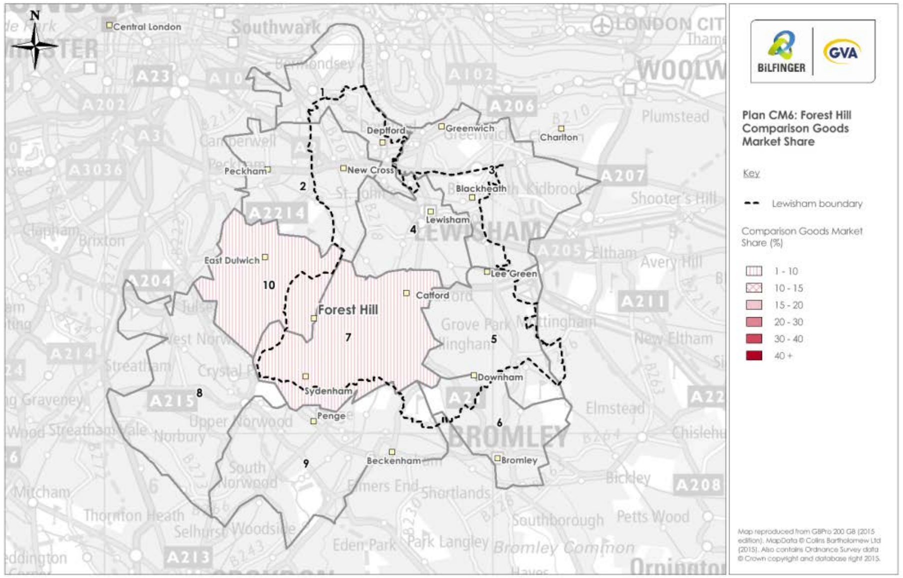
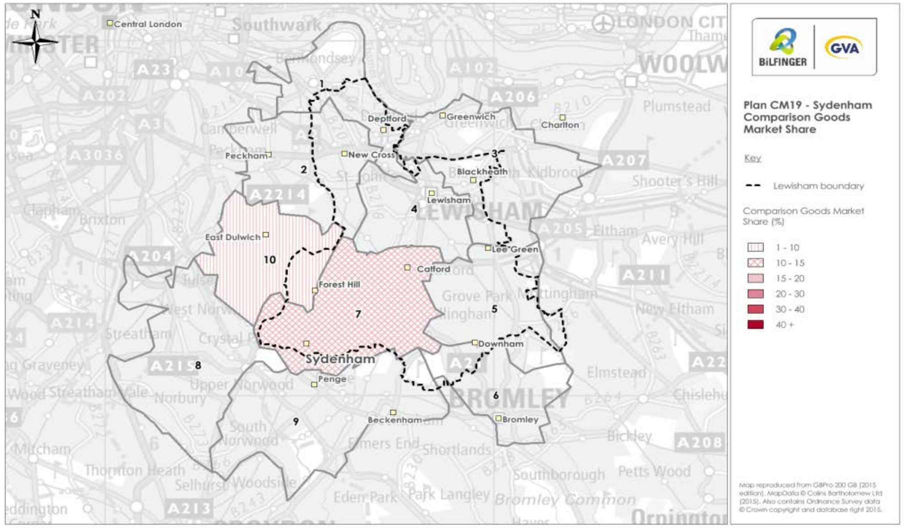


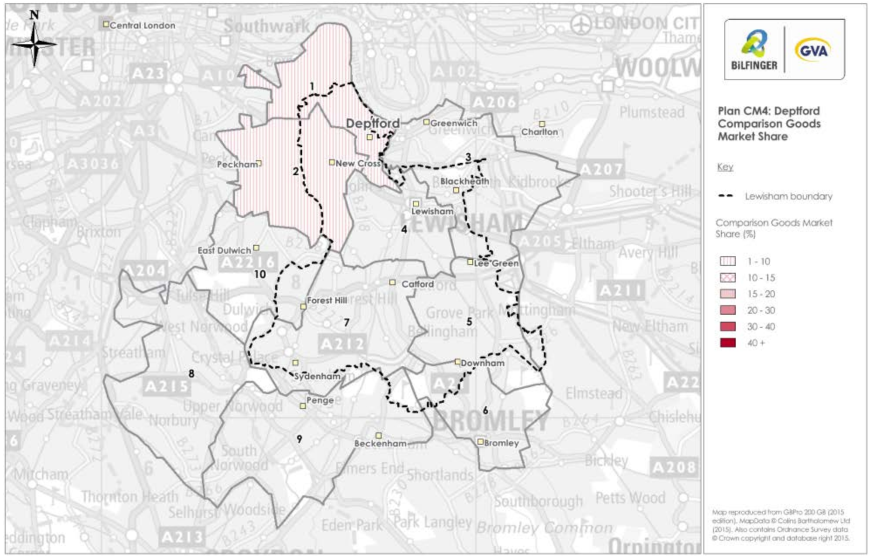
Figure 8.5: Sydenham district centre comparison goods catchment plan



Deptford & New Cross district centres

8.16 Deptford and New Cross district centres are also located in close proximity to one another, towards the north west of the Borough. Both centres' have a relatively limited comparison goods offer, with the focus of both centres' offer being on day to day food shopping and services, with New Cross also having a strong focus on bars and pubs. The comparison goods offer of New Cross is however enhanced by the presence of New Cross Gate Retail Park adjacent to the centre, which includes TK Maxx and Currys stores, and a Sainsbury's store with a reasonable provision of non-food items.

Figure 8.6: Deptford district centre comparison goods catchment plan

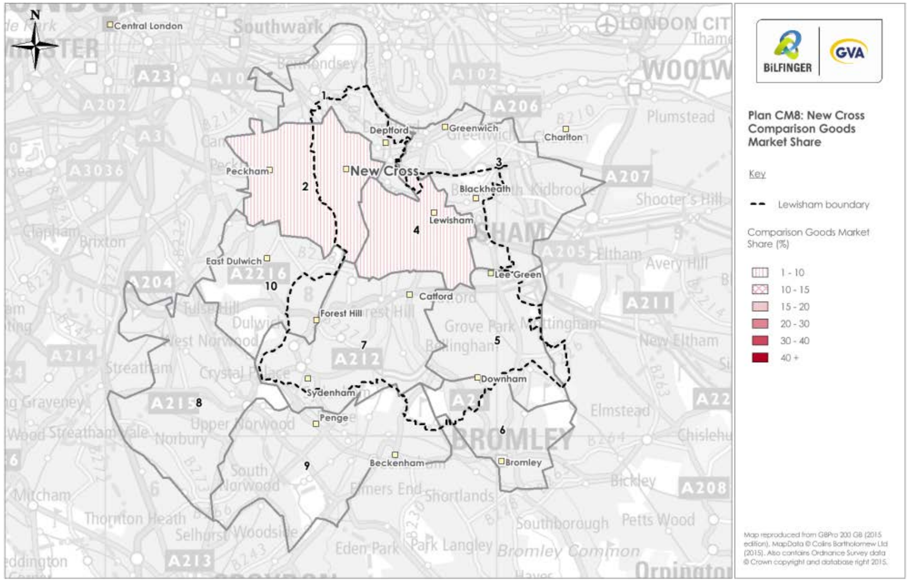


8.17 New Cross (zone 2) has a comparison goods turnover of £119.0m[10]; Deptford (zone 1) has a smaller comparison goods turnover of £10.0m. Deptford draws trade from zones 1, 2 and 3 (albeit at fairly low levels from each of these zones), whilst New Cross' catchment is largely restricted to zone 2. Most residents in zone 1 look towards Surrey Quays for their comparison goods shopping (£61.6m comparison goods spend from zone 1), as well as Lewisham and Central London, whilst most residents in zone 2 look towards Lewisham (£80.0m comparison goods spend from zone 2), as well as Peckham, central London, and to a lesser extent Croydon. Both New Cross and Deptford also face competition for comparison goods spending

[10] This turnover includes comparison goods spending at New Cross Gate Retail Park (including comparison goods spend at the Sainsbury's store at this location).

from retail warehousing at Old Kent Road, which draws £33.0m of comparison goods spend from residents in zone 1, and £48.6m from residents in zone 2.

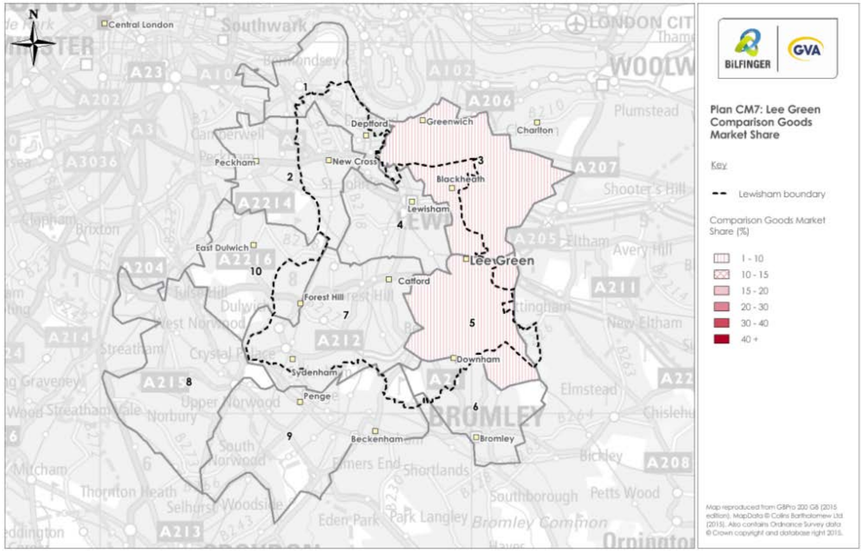
Figure 8.7: New Cross district centre comparison goods catchment plan



Lee Green district centre

8.18 Lee Green district centre has a comparison goods turnover of £20.8m, split between £13.0m in the district centre itself and £7.8m comparison goods turnover from the in-centre Sainsbury's store. Lee Green falls on the boundary of zones 3 and 5, and draws £12.3m of its comparison goods turnover from zone 3, and a further £6.0m from zone 5. We would expect that should redevelopment of the Leegate Centre come forward, the centre will be better placed to meet day-to-day comparison goods shopping needs for residents in the Lee / Blackheath areas, and potentially reduce the amount of expenditure flows to competing centres (chiefly Bromley, and to a lesser extent Bluewater and Eltham, in the case of residents in zone 5).

Figure 8.8: Lee Green district centre comparison goods catchment plan



Downham district centre

8.19 Downham district centre falls within zone 6, and has the lowest comparison goods turnover of all of the Borough's district centres, at £2.0m. This confirms the comparison goods offer in Downham is particularly limited, and the role and function of the centre is orientated towards convenience goods shopping and day to day services. The centre is the smallest of all of the centres in the Borough in terms of total floorspace, but does offer approximately 2,200 sq.m of comparison goods floorspace, and on this basis we consider that the centre's comparison goods turnover is lower than would be expected, and points to qualitative gaps in the retail mix, with some day to day shopping needs potentially not being met.

8.20 Given the small size of the centre, it is not surprising that the catchment of Downham is highly localised. The centre lies on the boundary of zones 5 and 6, and draws all of its turnover from these two zones.

Out-of-centre floorspace

8.21 As we have identified previously in this report, there are two principal locations for out-of-centre comparison goods retail floorspace in the Borough, at Bromley Road (Catford) and Bell Green (Sydenham). The household survey results confirm both of these exert a considerable influence over shopping patterns in parts of the Borough:

- Bromley Road retail warehousing draws a total of £61.3m of comparison goods spend from the survey area, chiefly from zones 4, 5 and 7, from which it draws £13.2m, £13.7m and £13.4m respectively.
- Bell Green draws a total of £45.2m of comparison goods spend from the survey area, almost two-thirds of which (£28.6m) is drawn from its 'local' zone, zone 7. The district centres in this zone (Forest Hill and Sydenham) have a comparison goods offer which is different to that of the retail park, and its recent opening does not appear to have significantly impacted on their vitality and viability at this time.

8.22 There is also further retail warehousing provision outside but close to the boundaries of the study area at Old Kent Road (which is easily accessible for residents in the Deptford / New Cross areas) which draws £87.8m of comparison goods spend from the survey area, and Charlton (accessible for residents in the Blackheath area), which draws £37.3m of comparison goods spend.

Comparison goods trading performance

8.23 Using the market shares attributed to each centre from the household telephone survey, and the baseline estimates of expenditure available to the survey area (as summarised in Section 7), we have been able to calculate the comparison goods turnover of each of the town and district centres in the Borough. This exercise is useful in showing whether a centre is trading in line with expectations (taking account its role and function in the retail hierarchy), or whether it is 'under-trading' or 'over-trading'.

8.24 Table 8G of Appendix II shows that, on aggregate, comparison goods floorspace in the Borough is trading at £6,684 per sq.m — this is an aggregate trading performance, based on the comparison goods turnover of town and district centres and also the out-of-centre floorspace, as well as comparison goods floorspace within larger foodstores. In Table 8.1, we set out the trading performance of individual town and district centres in the Borough, in order to establish a clearer understanding of how each centre is performing.

8.25 Table 8.1 shows there to be considerable fluctuations in the trading performance across the centres in the Borough. The strongest trading performance is from Lewisham town centre at £12,960 per sq.m, which is over double the Borough-wide 'baseline' sales density of £6,000 per sq.m which we have adopted for the purpose of this study. Because Lewisham is a higher-order town centre with a relatively strong comparison goods offer (as our health check assessments have identified), it would be expected that it would achieve a sales density in excess of the Borough-wide 'baseline' of £6,000 per sq.m (the baseline is designed to reflect the fact that there are centres of different roles and functions in the Borough each with different levels of comparison goods provision). Notwithstanding this, the performance of Lewisham town centre is a strong one and further planned improvements to its comparison goods offer should strengthen its position further in this respect.

Table 8.1: Trading performance of town & district centres in LB Lewisham

	Comparison goods turnover from survey area (£m)[1]	Estimated comparison goods floorspace (sq.m)[2]	Turnover per sq.m (£)
Town centres			
Lewisham	336.5	25,966	12,960
Catford	42.842.5	13,119	3,243
District centres			
Blackheath	6.8	2,572	2,658
Deptford	10.0	6,081	1,646
Downham	2.0	1,613	1,241
Forest Hill	30.6	2,874	10,633
Lee Green	20.8	2,531	8,207
New Cross	19.0	4,552	4,166
Sydenham	38.6	5,979	6,417

[1]*Source: Table 5a / Tables 8a-8d, Appendix I*
[2]*Source: Experian Goad category reports / EBC data*

8.26 Other centres which are performing particularly strongly in respect of their comparison goods sales densities are Forest Hill, Sydenham and Lee Green. Both Forest Hill and Sydenham have comparison goods turnovers in excess of £30.0m from the survey area and this translates into strong trading performances for both centres. Lee Green's performance is aided by the fact that the large Sainsbury's store which falls within the district centre boundary draws £7.8m of comparison goods spend from the survey area, and if this turnover were to be removed, the centre would be trading closer to 'baseline' levels. Nevertheless, in light of the some of the issues of the performance of this centre which this study has identified, this can be considered to be a reasonable performance.

8.27 A number of centres are trading at some way below the 'baseline' sales density figure of £6,000 per sq.m. Catford achieves a sales density of £3,243 per sq.m, and whilst our analysis has shown that the centre has a much more limited role and function as a comparison goods shopping destination compared to Lewisham, it is clear that the comparison goods floorspace which is currently present in the centre is likely to be under-trading. Both Deptford and Downham district centres also have particularly low comparison goods sales densities, a reflection of the fact that these centres principally cater towards meeting day-to-day convenience goods and services shopping, with only limited comparison goods shopping provision present — but in both cases the comparison goods floorspace which is present does not appear to be trading particularly strongly.

8.28 The performance of Blackheath is also shown to be below 'benchmark' levels, but this is because the comparison goods offer in this centre is a more specialised offer, and therefore the centre does not particularly act as a comparison goods 'destination' for many residents. Indeed, our health check analysis has identified some qualitative gaps in the 'day to day' comparison goods shopping offer in this centre.

8.29 It should be noted that the figures shown in Table 8.1 do not take account of expenditure 'inflow' from beyond the study area, and if these figures were to be included, the performance of some of the centres would be higher (we consider this is likely to be applicable to Blackheath, for example).

Identification of comparison goods capacity

8.30 Having undertaken the above assessment of trading performance, we are in a position to establish the quantum of new comparison goods floorspace which the Council should seek to plan for over the study period to 2033. In assessing capacity for future comparison goods floorspace, we have assumed that existing comparison goods floorspace stock across the Borough will improve its sales efficiency (i.e. its turnover per sq.m) over the course of the study period. As noted above, we have assumed that new comparison goods floorspace would achieve a sales density in the region of £6,000 per sq.m, which is considered to be a reasonable proxy for the trading performance of modern comparison goods floorspace in a robustly-trading location.

8.31 In identifying capacity it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. We also advise that findings should be considered alongside the qualitative discussion of the performance of individual centres which this report has previously set out, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace.

8.32 The capacity forecasts make allowance for the 'commitments' shown in **Table 8.2** to act as 'claims' on the amount of comparison goods spending which is available to support new floorspace. This information is based on monitoring information provided by the Council; turnover estimates are either based on our own estimates, or information provided in support of the corresponding planning application. The planning applications which have been submitted for a proposed new development at Lewisham Gateway, and for the redevelopment of the Leegate Centre in Lee, both remain undetermined at the time of preparation of this study, but Table 8.2 also shows the potential turnover of comparison goods floorspace within these developments if they were to be granted planning permission.

8.33 Table 8.2 shows that we have allowed for £12.8m of comparison goods spend to be deducted from the total available expenditure at 2021, increasing to £34.3m at 2026 as 'commitments' such as Deptford Wharf come forward. In allowing for these 'commitments' to subsequently improve their own sales efficiency (turnover per sq.m), they amount to a 'claim' of £38.4m by the end of the Plan period in 2033.

8.34 If the undetermined applications for Lewisham Gateway and the Leegate Centre redevelopment is included, the turnover of the 'commitments' increases to £82.9m by 2026 and £92.9m by 2033.

Table 8.2: Comparison goods planning commitments

Commitment name	Estimated comparison goods t/o 2021 (£m)	Estimated comparison goods t/o 2026 (£m)	Estimated comparison goods t/o 2031 (£m)	Estimated comparison goods t/o 2033 (£m)
EXTANT COMMITMENTS				
Asda, Thurston Road, Lewisham (non-food floorspace)	3.2	3.4	3.5	3.2
Land north of Surrey Canal Triangle	6.1	6.6	7.2	7.4
Deptford Wharves, Deptford	-	11.5	12.5	12.9
Convoys Wharf, Deptford	3.8	13.0	14.1	14.6
Total	**12.8**	**34.3**	**37.2**	**38.4**
UNDETERMINED APPLICATIONS				
Lewisham Gateway, Lewisham town centre	38.7	42.0	45.6	47.1
Leegate Centre redev't (undetermined)	6.1	6.6	7.2	7.4
Total incl. undetermined applications	**57.6**	**82.9**	**89.9**	**92.9**

Source: Table 7, Appendix I

8.35 The 'baseline' comparison goods capacity for the Borough for the period to 2033 are summarised in **Table 8.3.** These capacity forecasts are based on 'constant market shares', i.e. assuming that current patterns of comparison goods shopping (as identified in the household telephone survey) will remain unchanged. We have set out the capacity requirements for Lewisham and Catford town centres, plus a summary of the total 'needs' generated by the current performance of the district centres and the out-of-centre floorspace. It should be noted that the fact that the out-of-centre floorspace generates its own 'need' does not mean the identified capacity should be used to support further development in these locations; rather it should be directed back towards the existing network of town centres (and to a more limited extent district centres) to support their long term vitality and viability.

8.36 Similarly, from our assessment of the district centres there is unlikely to be sufficient availability of sites to accommodate the needs identified – although as we discuss in Section 11, there are opportunity sites in New Cross, Sydenham and Forest Hill which could accommodate some of the identified needs. However, again we expect most of this identified capacity to be directed back towards the higher-order centres in the Borough.

Table 8.3: Comparison goods floorspace capacity, Lewisham Borough

	2021 (sq.m net, rounded)	2026 (sq.m net, rounded)*	2031 (sq.m net, rounded)*	2033 (sq.m net, rounded)*
Lewisham town centre comparison goods capacity	**4,300**	**9,900**	*15,900*	*18,000*
(**Lewisham town centre** comparison goods capacity incl. Lewisham G'way)	**(-500)**	**(5,200)**	*(11,200)*	*(13,300)*
Catford town centre comparison goods capacity	**500**	**1,300**	*2,200*	*2,600*
District centres comparison goods capacity (combined) exc Leegate Centre	**1,900**	**4,400**	*7,100*	*8,100*
District centres comparison goods capacity (combined) incl Leegate Centre	**(900)**	**(3,400)**	*(6,200)*	*(7,200)*
Out-of-centre comparison goods capacity	**1,400**	**3,400**	*5,800*	*6,700*
Total comparison goods floorspace capacity	**7,600**	**17,100**	*30,600*	*35,600*
(Total comparison goods floorspace capacity incl. undetermined applications)	**700**	**10,200**	*23,800*	*28,800*

Source: Table 8a-8e, Appendix I
**Indicative only. Figures are cumulative.*

Summary

- **In this section we have set out a summary of the comparison goods shopping patterns of residents in the study area, showing where residents in each of the survey zones undertake their comparison goods shopping, identifying the trading performance of the comparison goods floorspace in the Borough's town and district centres, and identifying the amount of comparison goods floorspace which the Council should plan for over the period to 2033.**
- **Lewisham town centre draws £336.5m of comparison goods spending from the survey area, equivalent to just under 15% of all comparison goods expenditure available to the survey area. In particular, it draws almost £1 in every £2 available to residents in its 'local' zone, zone 4. It is positive to note that Lewisham town centre has increased its market share from each of the survey zone which make up its 'primary' and 'secondary' catchment areas, relative to the position at the time of the Council's previous retail evidence base study.**
- **Catford town centre, by contrast, has a comparison goods turnover which is approximately one-tenth of that of Lewisham town centre, and the centre is underperforming as a comparison goods shopping destination when considering its role and function as a 'major town centre'. The centre has lost market share from its catchment area since the Council's previous retail evidence base studies.**
- **The network of district centres have, by virtue of their more limited role and function, much narrower catchment areas, but all, with the exception of Downham, draw market share from at least one survey zone.**
- **Comparison goods floorspace in Lewisham town centre is currently achieving a sales density of £12,960 per sq.m, and we consider this to represent a strong trading performance. Catford town centre is currently achieving a comparison goods sales density of £3,243 per sq.m, which again is a reflection of its current underperformance. Comparison goods floorspace in a number of district centres — particularly Sydenham and Forest Hill — is trading noticeably strongly.**
- **Assuming a 'constant market share' approach – i.e. that current patterns of comparison goods shopping will remain unchanged throughout the course of the study period to 2033 — there is a need for the Council to plan for an additional 17,100 sq.m net comparison goods floorspace by 2026, increasing to (indicatively) 35,600 sq.m net by 2033.**
- **If planning permission is granted for a new development for Lewisham Gateway, and for the redevelopment of the Leegate Centre, the 'need' for new comparison goods floorspace reduces to 10,200 sq.m net by 2026 and indicatively to 28,800 sq.m net by 2033.**
- **Longer term capacity forecasts (i.e. those beyond 2026) should be considered indicative only and subject to regular review.**

9 CONVENIENCE GOODS CAPACITY FORECASTS

9.1 In this section we set out the capacity for additional convenience goods floorspace in the Borough over the period to 2033. Our discussion follows the same format as set out for the comparison goods capacity forecasts in the previous section. The discussion set out below should be read in conjunction with the tabulations at Appendix II of Volume 2.

Shopping patterns by centre

9.2 **Table 9.1** shows the most popular convenience goods shopping destinations for those parts of the survey area that fall wholly or predominantly within the Borough. It shows the extent to which convenience goods shopping needs are being met within each zone, or whether residents are having to travel further afield to meet their convenience goods shopping needs. The green-shaded entries denote stores within the respective 'local' zones; the purple-shaded zones denote stores within an adjacent survey zone.

Table 9.1: Local retention rate and most popular convenience goods shopping locations by zone

	Most popular convenience goods shopping location (%)	Second-most popular convenience shopping location (%)	Third-most popular convenience shopping location (%)
Deptford (zone 1)	Tesco Extra, Surrey Quays (43.3%)	Lidl, Bermondsey (5.7%)	Tesco, Lewisham (3.5%)
New Cross (zone 2)	Morrisons, Peckham (11.3%)	Sainsbury's, New Cross (10.5%)	Asda, Southwark (9.5%)
Blackheath (zone 3)	Sainsbury's, Lee Green (25.5%)	Sainsbury's Local, Greenwich (7.4%)	Sainsbury's, Charlton (5.9%)
Lewisham (zone 4)	Sainsbury's, Lewisham (20.5%)	Tesco, Lewisham (18.7%)	Sainsbury's, Lee Green (10.0%)
Lee Green & Downham (zone 5)	Sainsbury's, Lee Green (23.4%)	Asda, Charlton (6.0%)	Sainsbury's, Lewisham (4.6%)
Catford & Sydenham (zone 7)	Sainsbury's, Bell Green (36.2%)	Sainsbury's, Lewisham (6.0%)	Lidl, Sydenham (4.6%)
Forest Hill (zone 10)	Sainsbury's, Forest Hill (27.0%)	Sainsbury's Local, East Dulwich (Lordship Lane) (12.0%)	Sainsbury's, East Dulwich (Dog Kennel Hill) (9.6%)

Source: Table 4, Appendix II

9.3 Table 9.1 shows that, by and large, centres in the Borough are relatively self-sustaining, and there is not significant evidence of residents needing to travel significant distances in order to undertake their convenience goods shopping. Indeed, the only LB Lewisham zone in which residents are travelling outside of the zone for their preferred zone is Blackheath (zone 3), where residents make use of facilities in nearby Lee Green (zone 5) or Greenwich / Charlton. Our health check assessment has identified the absence of a foodstore in Blackheath district centre as being a key qualitative gap – although it is also apparent there are clear constraints in terms of availability of sites in this area.

9.4 For many of the zones in the Borough, food shopping patterns are relatively dispersed – for example the most popular foodstore in zone 2 (Morrisons in Peckham) only attracts a market share of 11.2%, and in a further four zones the most popular store attracts a market share of between 20 and 30%. This suggests there is a good range of provision within and surrounding these areas which meets local residents' shopping needs. In two zones there are stores which have a more dominant trading position – in zone 1, Tesco Extra in Surrey Quays attracts 43.3% of the market share, and in zone 7 Sainsbury's in Bell Green attracts a market share of 36.2%. These suggest there is a more limited customer choice for residents in these areas, and, as we set out below, we understand these stores are trading strongly.

Performance assessment

9.5 In Tables 6 and 8 of Appendix II, we have undertaken a review of the trading performance of the convenience goods floorspace in the Borough, to establish whether the floorspace is trading in line with 'benchmark' levels (i.e. company averages for national operators, or typical sales densities for independent retailers). Table 8 of Appendix II shows that, on average, convenience goods floorspace in the Borough is trading at £11,913 per sq.m. This is a high sales density, and indicates that the majority of convenience goods floorspace in the Borough is trading well. This high sales density also suggests that the majority of convenience goods sales in the Borough are accounted for by larger-format supermarkets, as smaller independent/convenience goods retailers operate with much lower sales densities.

9.6 In Table 6 of Appendix II we set out the trading performance of individual foodstores in the Borough. This shows that, reflecting the high sales density shown above, most foodstores in the

Borough are trading strongly, and have turnovers which are substantially in excess of 'benchmark' levels. Foodstores are trading particularly strongly in the Lewisham, Lee Green, Sydenham and Forest Hill areas.

9.7 The following conclusions can be drawn in respect of the performance of convenience goods floorspace in the Borough:

- Foodstores in **Lewisham town centre** are, on aggregate, trading at +£65.3m above company average levels. Much of this 'overtrading' is accounted for by the Sainsbury's store in Lewisham town centre, which is trading at £41.1m above company average levels. The foodstore in the Marks & Spencer store is also trading well.
- In addition, the out-of-centre Tesco store on Lewisham Road is also trading strongly, at £23.9m above company average levels. There is therefore substantial 'overtrading' of floorspace in the Lewisham area at present, although it should be noted that the overtrading of these stores will be diluted by the opening of the new Asda store on Loampit Vale which will provide direct competition to the Tesco and Sainsbury's stores.
- In **Catford town centre**, the Aldi and Lidl stores are both trading strongly, with the Aldi over-trading by £16.4m and Lidl by £3.6m. However, the Tesco store in the Catford Centre is trading below company average levels, and is under-trading by -£13.8m. Whilst it is possible that some respondents to the household survey might have mistaken the Tesco Express store at Rushey Green (which is over-trading more than would be expected for a small convenience store), this would not fully account for the extent to which is store is underperforming. Smaller convenience goods-format floorspace across the town centre is also underperforming, which means that on aggregate convenience goods floorspace in Catford is trading at -£4.6m below average turnover levels.
- The Sainsbury's store at **Lee Green district centre** is also performing particularly well, achieving a turnover which is £43.7m above company average levels, affirming its role as a strong 'anchor' store to the rest of the retail offer in Lee Green district centre.
- In **Sydenham district centre**, the Lidl store is performing strongly (+£8.1m above company average), the Co-Operative store is trading in line with company averages, and smaller-format convenience goods floorspace is under-trading. This means that overall, convenience goods floorspace in the centre is trading broadly at equilibrium. The nearby out-of-centre large Sainsbury's store at Bell Green is one of the strongest performing foodstores in the Borough, trading at approximately +£34.1m above company average levels.
- In **Forest Hill district centre**, the Sainsbury's foodstore on London Road is another store which is trading strongly, at approximately +£20.2m above company average levels. Other convenience goods floorspace in the centre is trading in line with expectations.
- Convenience goods floorspace in **Deptford and New Cross district centres** are generally performing at below average levels, but this reflects the fact that the offer in these centres is predominantly accounted for by 'top up' shopping. The Sainsbury's store at New Cross Gate Retail Park also appears to be performing slightly below company average levels.

9.8 The trading performance of specialist/independent retailers is generally below expected trading levels, although this is often because patterns of visits to these type of shops are under-reported in household survey responses when compared to 'named' foodstores. Nevertheless the trading performance of independent retailers should be carefully monitored and initiatives which support the promotion of retailers of this nature should be supported.

Identification of convenience goods capacity

9.9 Having set out the population and expenditure growth expected to come forward in the convenience goods sector (Section 6) and undertaken the analysis of shopping patterns (above), Table 9.3 shows the capacity for additional convenience goods floorspace in the Borough over the period to 2033. We present these as 'global, borough wide' need figures – rather than 'centre by centre' – to allow for the conclusions and recommendations to advise where this need should be met taking into account qualitative and quantitative issues and physical site opportunities.

9.10 As with the comparison goods capacity forecasts which we have set in Section 8, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. Forecasts beyond 2026 should be considered indicative only. Findings should be considered alongside our qualitative assessments set out earlier in this report, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace.

9.11 The capacity forecasts make allowance for the 'commitments' shown in **Table 9.2** to act as 'claims' on the amount of convenience goods spending which is available to support new floorspace. This information is based on monitoring information provided by the Council; turnover estimates are either based on our own estimates, or information provided in support of the corresponding planning application.

9.12 Table 9.2 also shows the turnover which would be generated by the convenience goods floorspace in the proposed developments at Lewisham Gateway and the Leegate Centre redevelopment, should these development be granted planning permission. In the case of Lewisham Gateway, we have assumed that 10% of the total proposed net sales area of the maximum proposed class A1 floorspace could be used for convenience goods sales (660 sq.m). For the Leegate Centre, we have assumed the proposed convenience goods floorspace will come forward as a single large-format supermarket, and is calculated using the sales density of the intended operator, Asda.

Table 9.2: Convenience goods planning commitments

Commitment name	Estimated convenience goods t/o 2021 (£m)	Estimated convenience goods t/o 2026 (£m)	Estimated convenience goods t/o 2031 (£m)	Estimated convenience goods t/o 2021 (£m)
EXTANT COMMITMENTS				
Asda, Thurston Road, Lewisham (non-food floorspace)	13.8	13.9	13.9	14.0
Land north of Surrey Canal Triangle	4.9	4.9	5.0	5.0
Deptford Wharves, Deptford	-	12.2	12.2	12.2
Convoys Wharf, Deptford	5.3	5.4	5.4	5.4
Total	**24.0**	**36.4**	**36.5**	**36.6**
UNDETERMINED APPLICATIONS				
Lewisham Gateway, Lewisham town centre	8.0	8.0	8.0	8.0
Leegate Centre redev't	23.7	23.8	23.9	24.0
Total incl. Leegate Centre	**55.7**	**68.2**	**68.5**	**68.6**

Source: Table 7, Appendix II

9.13 Based on a 'constant market share' approach (i.e. assuming that current patterns of shopping remain unchanged), **Table 9.3** shows that there is a quantitative 'need' for 11,900 sq.m net additional convenience goods floorspace in the Borough over the period to 2033. Owing to the strong performance of existing convenience goods floorspace in the Borough, there is a positive 'need' for additional floorspace throughout the Plan period, with capacity for 11,700 sq.m at 2021, although the relatively low growth in per capita spend on convenience goods which is currently forecast means that there are only relatively incremental increases in the amount of convenience goods floorspace required for the rest of the period to 2033.

Table 9.3: Convenience goods floorspace capacity, LB Lewisham

	2021 (sq.m net, rounded)	2026 (sq.m net, rounded)*	2031 (sq.m net, rounded)*	2033 (sq.m net, rounded)*
Convenience goods floorspace capacity	**11,700**	**11,900**	***12,600***	***12,700***
Convenience goods floorspace capacity (incl. Leegate redev't)	**9,100**	**9,300**	***10,000***	***10,100***

Source: Table 8/Table 8b, Appendix III
**Indicative only. Figures are cumulative and rounded.*

9.14 If planning permission is granted for the Lewisham Gateway development and the redevelopment of the Leegate Centre, the 'need' for additional convenience goods floorspace in the Borough reduces to 9,300 sq.m net by 2026, increasing to (indicatively) 10,100 sq.m net by 2033 (as summarised in **Table 9.3**).

Summary

- **In this section we review the convenience goods shopping patterns of residents in the study area in greater detail, showing the most popular convenience goods facilities in each of the study zones which fall within LB Lewisham, reviewing the trading performance of convenience goods floorspace, and identifying the amount of convenience goods floorspace which the Council should plan for over the period to 2033.**
- **With the exception of Blackheath, there are no gaps in convenience goods provision in the Town and District Centres. Each of the Borough's town and district centres has at least one foodstore which in many cases acts as an 'anchor' store to the wider retail and leisure offer.**
- **There are instances where foodstores exert a particularly strong influence over local shopping patterns — most notably the Tesco Extra store at Surrey Quays (which falls outside the Borough, but draws significant trade from the Deptford / New Cross area), and the Sainsbury's store at Bell Green, near Sydenham. Elsewhere, residents benefit from greater consumer choice, and there is no one supermarket which dominates shopping patterns to such a great degree.**
- **Convenience goods floorspace across the Borough is, generally speaking, trading well, and a handful of foodstores are trading significantly in excess of – in some cases double – company average levels. Stores which are trading particularly strongly include Sainsbury's and Tesco stores in Lewisham, Aldi in Catford, and Sainsbury's stores in Lee Green and Forest Hill district centres, plus the out-of-centre large Sainsbury's store at Bell Green. In many cases these stores act as 'anchor' stores to their respective centres and therefore their strong trading is likely to have wider benefits to the vitality and viability of the centres.**
- **A small number of foodstores are trading at below average levels, the most notable of which being the Tesco store in Catford Centre. Whilst this store is likely to benefit from 'top up' shopping to a greater extent than many other similar-sized store's in Tesco's estate (as opposed to 'main food' shopping), the performance of this store nevertheless appears to be cause for concern.**

- **Assuming a 'constant market share' approach – i.e. that current patterns of convenience goods shopping will remain unchanged – the Council should plan for 11,700 sq.m net additional convenience goods floorspace by 2021, with further incremental increases to an indicative requirement of 12,700 sq.m net by 2033. These figures take into account 'commitments' for new retail floorspace in the Borough. In Section 11, we set out recommendations as to potential opportunity areas for the development of this floorspace.**
- **If planning permission is granted for the Lewisham Gateway scheme and the redevelopment of the Leegate Centre (both of which are currently underdetermined), the 'need' for new convenience goods floorspace reduces to 9,300 sq.m net by 2026, and indicatively 10,100 sq.m net by 2033.**
- **Longer term capacity forecasts (i.e. beyond 2026) should be considered indicative only and subject to regular review.**

10 COMMERCIAL LEISURE ASSESSMENT

10.1 Commercial leisure uses are playing an increasingly important role in the vitality and viability of centres by providing complementary uses that strengthen both the daytime and evening economies. Due to the changing nature of high-street shopping, leisure uses can often represent a significant proportion of a town centre's overall turnover, and our health check assessments in this report have highlighted the importance commercial leisure plays to the vitality and viability of a number of the centres in the Borough.

10.2 This section of the report considers the current provision of leisure uses through the study area, including patterns of visits to restaurant, café, cinema, entertainment venues and cultural facilities, and identifies any qualitative 'gaps' in the provision of these facilities. The results are informed by our qualitative assessments of centres carried out by GVA and the findings of the household telephone survey undertaken in support of this study in January 2016. We also consider the amount of expenditure growth which is expected to come forward on leisure goods over the course of the study period, although we do not translate this to a floorspace requirement.

10.3 By way of recap, our health check assessments identified that:

- Café, restaurant and pub uses play a particularly significant contribution to the vitality and viability of Blackheath district centre. The centre contains an extensive number of cafes and restaurants, with a number of established national multiples trading alongside independent operators in the centre. There are a considerable number of independent public houses that also play an important role in contributing to the role and function of Blackheath as an evening destination.
- New Cross has a high number of leisure services, especially cafés, restaurants, public houses, nightclubs and fast food/ takeaways. This is owed (at least in part) to the presence of Goldsmiths University in the centre, with many retail and service units catering specifically towards the local student population who live or study in the area. The leisure offer of the centre has recently been enhanced with the opening of a new Curzon Cinema on the Goldsmith's Campus.
- Lewisham and Catford both have relatively limited commercial leisure offers, particularly in terms of the provision of café culture and casual / family dining restaurants. The redevelopment underway in Lewisham town centre will, ideally, introduce an enhanced offer into the town centre to enable the centre to improve its provision in this respect.
- Forest Hill has a good and developing food and drink offer, which is reflective of its role as a district centres. Dartmouth Park Road in particular appears to be an emerging hub for independent specialist food and drink operators along boutique comparison goods retailers. Similarly Deptford has a limited but developing offer, although its proximity to New Cross means that the commercial offer of these two centres overlaps and complements one another to a degree.

10.4 The findings of the household survey identified that:

- Going to theatres, museums or art centres was the most popular leisure activity, with 60% of respondents in the survey area stating they participate in this activity, with figures ranging from 41% of respondents in zone 1 (Deptford) to 72% of respondents in zone 9 (South Norwood/Beckenham).
- This is followed by visiting the cinema (59% of respondents in the survey area), eating in restaurants (56% of respondents) and going to cafés/restaurants (50% of respondents).
- 42% of respondents stated that they visit pubs/clubs. 33% of respondents stated they visit health and fitness clubs, whilst 23% visit of respondents visit entertainment venues including ten-pin bowling, ice skating and bingo. 14% of respondents stated that they visit children's soft play venues.
- 12% of survey respondents did not partake in any of the above leisure activities.

10.5 It should be remembered that patterns of visits to leisure activities are, in part, a reflection of the availability of facilities across the survey area. In other words, if residents have relatively easy access to leisure facilities, levels of participation are likely to be higher. We briefly discuss the key findings in each of these categories below.

Cafés/ Restaurants (daytime)

10.6 Previous sections of this study have identified the increasing importance of restaurants (and cafes) to the wider vitality and viability of town centres – and as set out above our health checks of the Borough's centres have identified that whilst some centres such as Blackheath and Forest Hill have a good mixture of these facilities, other centres – particularly the larger centres of Lewisham and Catford – are under-provided for, and improvement of these facilities therefore represents an important opportunity for these centres.

10.7 The results of the household telephone survey identified that:

- 'Going to cafes/restaurants' was cited as the most popular leisure activity by just 50% of residents. We consider this to be a relatively low percentage (based on comparable studies we have undertaken elsewhere), and one which confirms a limited choice of these type of facilities in parts of the Borough.
- This figure varied across the study area considerably, ranging from 39% in zone 7 (Catford/Sydenham) to 60% in zone 4 (Lewisham).

- Across all zones, the household survey results indicate that central London was the location most people go for visiting cafés/ restaurants (11%). Blackheath was the second most visited location (10%) and Lewisham town centre was the third (7%).
- The household survey results indicate that central London draws principally from zone 8 (West Norwood) (26%), zone 1 (Deptford) (16%) and zone 9 (South Norwood/Beckenham) (13%).
- The household survey results confirm the popularity of Blackheath for this type of leisure activity, and show that Blackheath has a catchment area considerably in excess of what would typically be expected for a centre of its role and function in the Borough's hierarchy of centres. Blackheath draws trade from zone 3 (Blackheath/Greenwich) (39% market share), zone 4 (Lewisham) (26% market share) and zone 5 (Lee Green/Downham) (26% market share). Blackheath therefore accounts for over one-third of visits to cafés and restaurants in its 'local' zone (zone 3), confirming the strength of the offer of Blackheath in this respect.
- The household survey results indicate that Lewisham town centre draws lower market shares, drawing trade principally from zone 4 (21% market share), zone 2 (New Cross) (18%) and zone 3 (Blackheath/Greenwich) (12%). Therefore despite being a higher order centre than Blackheath, Lewisham attracts noticeably lower market shares than Blackheath.
- It is noteworthy that Catford does not attract a significant market share in this category, with the highest market share of 4% from zone 10 (Dulwich/Forest Hill) and a negligible market share from its 'local' zone (zone 7). Our health check assessments have identified that Catford is poorly provided for in respect of this type of commercial leisure activity; nevertheless this market share is particularly low and confirms a fairly pressing need for the enhancement of the offer in the town centre.

Restaurants (evening)

10.8 The results of the household telephone survey identified that:

- Going to restaurants was the third-most popular leisure activity for residents of the study area, with 56% of all respondents taking part in this form of leisure activity, a similar proportion to those who visit cafes and restaurants during the daytime.
- This figure varied across the study area, ranging from 40% in zone 1 (Deptford) to 70% zone 9 (South Norwood/Beckenham).
- Central London is the most popular location for those in the catchment visiting restaurants in the evening (19%). Crystal Palace and Blackheath were the second most visited locations (9%) and Beckenham was the third (8%). Greenwich was the fourth most visited location (6%). With the exception of Blackheath, the town centres in Lewisham therefore score poorly in terms of market share in this category.
- The household survey results indicate that central London draws principally visitors from zone 8 (West Norwood) (37%), zone 1 (Deptford) (28%), zone 10 (Dulwich/Forest Hill) (25%) and zone 6 (Bromley) (22%).
- The household survey results indicate that Blackheath draws principally from zone 3 (Blackheath/Greenwich) (45%), zone 4 (Lewisham Town Centre) (25%) and zone 5 (Lee Green/Downham) (16%). Again, therefore it can be seen that Blackheath performs particularly strongly from its intermediate catchment area, attracting almost half of all market shares from its 'local' zone (zone 3) and a further quarter of the market shares from the adjacent zone 4. Its principle competition for market share comes from Greenwich. No trade is drawn from zones 6 (Bromley), 8 (West Norwood), 9 (South Norwood/Beckenham) or 10 (Dulwich/Forest Hill); many of the centres in these areas have their own restaurant/dining offers, and it is noteworthy that there are a number of improvements coming forward in Bromley town centre in respect of enhancement of its casual dining offer.
- Greenwich also draws some market share from zone 3 (Blackheath/Greenwich) (25%), zone 1 (Deptford) (13%) and zone 5 (Lee Green/Downham) (11%).

10.9 Lewisham and Catford do not currently attract significant market shares for evening dining from any of the survey zones. This is particularly noticeable when contrasted against Lewisham's popularity as a comparison shopping destination (as we have set out earlier in this report), and points to a clear qualitative shortfall in the offer of the centre in this respect. Whilst there have been some positive developments in respect of improving provision in recent years, particularly the re-use of the former Model Market site as a destination for street food and drink during weekends (positively, the opening hours for this have recently been extended), there remains a need for more family dining / casual dining restaurants in the centre.

10.10 Similarly in Catford, the number of respondents visiting the centre for restaurants is low, and additional provision would support Catford's role as both the civic hub of the Borough and also important cultural assets such as the Broadway Theatre.

Cinemas

10.11 As we have set out previously in this study, Lewisham has for some time been the only London Borough without a permanent cinema facility, although the opening of the Curzon facility at Goldsmiths University in New Cross has changed this. However, there remains an absence of larger 'mulitplex' cinema developments in the Borough, meaning that many residents are having to travel some distance to visit a cinema, and meaning that higher-order centres (and in particular Lewisham town centre) are missing an important 'evening economy' anchor.

10.12 The results of the household telephone survey identified that:

- Going to the cinema was the second-most popular leisure activity amongst survey respondents, with 59% stating that it was a leisure activity that they partake in.
- Compared to comparable surveys which we have undertaken elsewhere, this is quite a low proportion, and likely reflective of the absence of a permanent multiplex cinema facility in the Borough at present.
- However, again there are variances in the proportion of residents who visit the cinema from difference parts of the survey area ranging from 37% in zone 6 (Bromley) to 71% in zone 10 (Dulwich/Forest Hill), which benefits from closer proximity to cinema facilities in East Dulwich, Brixton and Peckham.
- The most visited cinema across the survey area was the Odeon cinema at Surrey Quays Leisure Park, accounting for 16% of cinema visits across the study area. The Odeon cinema on Beckenham High Street was the second most visited location (15%), followed by Greenwich Picturehouse (11%).
- The household survey results indicate that the Odeon cinema at Surrey Quays Leisure Park draws principally visits from zone 1 (Deptford; the cinema falls within this zone) (81%), zone 2 (New Cross) (30%) and zone 7 (Catford/Sydenham) (19%); most residents in these areas are able to access Surrey Quays relatively easily by public transport. The market share for the cinema is between zero and seven per cent for the remainder of the zones.
- Neither Lewisham (zone 4) or Catford (zone 7) have a cinema. The household survey results indicate that the majority of market shares from zone 4 go to Greenwich Picturehouse (46%) and the Odeon Cinema in Greenwich (13%). The majority of market shares from zone 7 go to the Odeon in Beckenham (34%) and Odeon Surrey Quays (19%). These are relatively long distances to travel, particularly for residents in zone 7, and confirm the qualitative need for improved provision within the Borough.
- The Odeon cinema in Beckenham draws principally visits from zone 9 (South Norwood) (56%), zone 6 (Bromley) (42%) and zone 7 (Catford/Sydenham) (34%). Greenwich Picturehouse draws trade principally from zone 4 (Lewisham Town Centre) (46%), zone 3 (Blackheath/Greenwich) (41%) and zone 5 (Lee Green/Downham) (16%).

Cultural Facilities

10.13 'Cultural facilities' encompasses a broad range of leisure activities which includes visiting the theatre, going to concerts/gigs, museums, exhibitions and art galleries, and so on. The results of the household telephone survey identified that:

- Going to cultural facilities such as theatres, museums and art galleries was the most popular leisure activity for residents in the survey area: 60% of respondents stated that they took part on at least one of these cultural activities.
- As would be expected, the location visited most often to partake in any of the above activities was central London (83% of all visits to cultural facilities) clearly reflecting the leading cultural offer which is available in central London, and is available to most residents within relatively easy reach.
- The cultural offer within the study area is relatively limited in comparison to that of central London, and is largely limited to smaller-scale facilities such as those in Deptford. These facilities do not attract particularly high market shares in comparison. The most popular cultural venue within the Borough is the Horniman Museum and Gallery in Forest Hill (7% of visits to cultural facilities).

Entertainment Venues

10.14 'Entertainment venues' refers to a number of commercial leisure activities such as ten-pin bowling, ice skating, and bingo. The provision of these facilities is relatively limited in the Borough (and indeed the survey area) and is largely restricted to a small bowling facility in Lewisham, and a Mecca Bingo in Catford. Other nearby facilities include a Hollywood Bowl at Surrey Quays leisure park. Our household survey identified that:

- Only 23% of all survey respondents stated that they took part in at least one of the entertainment activities, which may in part be a reflection of the relatively limited provision of these type of facilities in the Borough, but also reflects that these type of activities generally appeal to a narrower range of the population than some of the other forms of commercial leisure activity listed above.
- Popular destinations for survey respondents include Hollywood Bowl in Surrey Quays (34%), MFA Bowl in Lewisham (20%), as well as central London (12%).
- The household survey results indicate that Hollywood Bowl in Surrey Quays draws principally visits from zone 1 (Deptford) (77%), zone 2 (New Cross) (66%), zone 10 (Dulwich/Forest Hill) (58%), zone 8 (West Norwood) (27%), zone 4 (Lewisham Town Centre) (20%) as well as zones 3 (Blackheath/Greenwich) and 7 (Catford/Sydenham) (19%), and therefore has a catchment area that extends across much of the survey area, partly likely to be a reflection of the strong public transport links to Surrey Quays from much of the survey area (via the London Overground), as well as the presence of complementary leisure facilities at Surrey Quays such as the Odeon cinema and a number of casual dining restaurants.
- The MFA Bowl facility in Lewisham town centre is relatively dated in comparison but nevertheless also has a relatively strong, albeit more localised catchment. The household survey results indicate that MFA Bowl in Lewisham draws principally from zone 3 (Blackheath/Greenwich) (75%), zone 7 (Catford/Sydenham) (49%), zone 4 (Lewisham Town Centre) (41%), zone 6 (Bromley) (41%) and zone 10 (Dulwich/Forest Hill) (33%).
- The household survey results indicate that central London – all venues draws trade from all zones, ranging from 5% in zone 10 (Dulwich/Forest Hill) to 31% in zone 8 (West Norwood), with the higher market share from zone 8 likely to be reflected by the absence of facilities of this nature towards the southern end of the survey area, and also greater distance/more limited ease of access to Surrey Quays.

10.15 Whilst some parts of the survey area therefore benefit from considerably stronger access to these type of facilities than others, we do not consider there to be a pressing qualitative need for additional provision. Residents to the north of the Borough will inevitably look towards Surrey Quays, and, assuming this type of commercial leisure provision is retained as part of the proposed redevelopment of Surrey Quays, additional provision is unlikely to be required.

10.16 There is a case for upgrading / enhancing existing provision in Lewisham town centre. The MFA facility draws strong market shares from the Lewisham and Catford areas but is a dated facility which appears in need of improvement. There may also be, in the medium to longer term, a case for the development of a entertainment facility in Catford town centre, to better serve the needs of the southern part of the Borough.

Health and Fitness Facilities

10.17 Health and fitness facilities typically includes visits to public or private health, fitness and sports facilities, which might include Council-operated provision (for example the new Glass Mill leisure centre in Lewisham town centre, or the recently-renovated Forest Hill Pools, in Forest Hill district centre), or privately operated facilities. The household survey found that:

- The household survey found that 33% of residents in the survey area use health and fitness facilities. Beckenham was mentioned the most as the location that people go for visiting health and fitness facilities.
- The Glass Mill Leisure Centre in Lewisham represents an important additional introduction to the leisure offer of the Borough in respect if this category, but the indication from the household survey are that the catchment for this facility does not extend significantly beyond the immediate (i.e. Zone 4) catchment area at the present time.
- Forest Hill Pools in Forest Hills was the third-most visited location (7%). The household survey results indicate that Forest Hills Pools draws principally visits from its 'local' zone (40%) and zone 7 (Catford/Sydenham) (31%).

Glass Mill Leisure Centre, Lewisham (Picture credit: LA Architects)

Expenditure growth in the commercial leisure sector

10.18 By applying the GLA ward-based population projections[11] we have adopted for our retail capacity forecasts to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure spending available to residents of the survey area. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it does provide an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above.

10.19 Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:

- **'Cultural services'** – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix. Spending on this type of leisure service ranges from £229 per person, per annum (zone 2) to £338 per person, per annum (zone 3).

[11] See paragraph 7.6 for an explanation of how the population forecasts have been calculated.

- **'Recreation and sporting services'** – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs. Spending on this type of leisure service ranges from £107 per person, per annum (zone 2) to £231 per person, per annum (zone 10).
- **'Restaurants and cafes'** – this includes spending in both restaurants and cafes, and also includes spending on 'alcoholic drinks consumed outside the home' (i.e. in pubs and bars) and on take-aways. Spending on this type of leisure service accounts for the majority of residents' commercial leisure spend, ranging from £1,119 per person, per annum (zone 2) to £1,890 per person, per annum (zone 10).

10.20 Experian advise that spending on commercial leisure services will increase by 1.3% per annum over the period 2015-33. By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian's population projections for the survey area (see Table 1, Appendix I), the total 'pot' of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 10.2.**

Table 10.2: Growth in commercial leisure spending in survey area, 2015-35

	2016 (£m)	2021 (£m)	2026 (£m)	2031 (£m)	2033 (£m)	Change, 2016-33 (£m)
Cultural services	202.5	226.7	249.7	272.3	280.8	+78.3
Recreation & sporting services	109.6	122.6	135.0	147.1	151.8	+42.2
Restaurants & cafes	988.1	1,108.1	1,221.6	1,332.9	1,374.3	+386.2
Total commercial leisure spend	**1,300.1**	**1,457.4**	**1,606.3**	**1,752.3**	**1,806.8**	**+506.6**

Source: Experian Micromarketer

10.21 Table 10.2 shows that total spending on commercial leisure is expected to increase by £506.6m in the survey area between 2016 and 2033. The vast majority (76%) of this expenditure growth will be in the 'restaurants and cafes' sector, which also includes spending growth in pubs and bars. Our assessment has set out how these uses already play an important role in contributing to the vitality and viability of many of the centres in the Borough, and Table 10.2 shows that there is scope for these centres to further capitalise on this growth.

10.22 Growth in cultural services expenditure is more limited in comparison, and we would expect that a reasonable proportion of this will be captured by facilities in central London. However, there may be scope to support the enhancement of cultural services in the Borough, particularly because – as has been identified in this study – there is no cinema provision in the Borough at present, with the exception of the small-scale Curzon facility at Goldsmith's. There is therefore a qualitative case for improvement of cinema facilities in the Borough, which will result in expenditure which is currently being lost to competing locations such as Surrey Quays and Greenwich being 'clawed back'.

10.23 New provision should be centrally located within existing town centres where possible, in order to support the development of complementary uses and enhance the wider vitality and viability of the centre(s). We would recommend that new provision is directed towards Lewisham town centre in the first instance, as this is where the greatest qualitative 'need' for provision exists. However, should proposals for smaller-scale/'boutique' cinemas (similar to the Curzon in New Cross, or Picturehouse in East Dulwich for example) come forward, these should also be supported in principle.

Summary

- **In this section we have set out the patterns of visits of residents in the study area for different types of commercial leisure spending, such as cafes, restaurants, cinemas, and cultural facilities such as museums and art galleries.**
- **Going to theatres, museums or art centres was the most popular leisure activity, with 60% of respondents in the survey area stating they participate in this activity, with figures ranging from 41% of respondents in zone 1 (Deptford) to 72% of respondents in zone 9 (South Norwood/Beckenham).**
- **This is followed by visiting the cinema (59% of respondents in the survey area), eating in restaurants (56% of respondents) and going to cafés/restaurants (50% of respondents).**
- **42% of respondents stated that they visit pubs/clubs. 33% of respondents stated they visit health and fitness clubs, whilst 23% visit of respondents visit entertainment venues including ten-pin bowling, ice skating and bingo. 14% of respondents stated that they visit children's soft play venues.**
- **Lewisham has for some time been the only London Borough without a permanent cinema facility, although the opening of the Curzon facility at Goldsmiths University in New Cross has changed this. However, there remains an absence of larger 'mulitplex' cinema developments in the Borough, meaning that many residents are having to travel some distance to visit a cinema, and this represents the most significant qualitative gap in commercial leisure provision in the Borough which needs to be addressed in the short to medium term. It is considered that Lewisham town centre would represent the most appropriate location for a facility of this nature, however this should not prevent smaller/boutique cinema developments in the other town/district centres should suitable opportunities arise.**
- **Our qualitative analysis has shown that Lewisham town centre is also under-provided for in terms of other commercial leisure uses, in particular cafes, restaurants and bars. These are**

important contributors to the overall mix of uses in a centre, as they promote longer dwell times, linked trips spending, and in the case of bars/restaurants, an enhanced evening economy. The provision of additional facilities of this nature in Lewisham town centre would be beneficial, and would capitalise on the popularity of the Model Market in recent years as weekend venue for street food and drink.

- The proportion of respondents who visit 'entertainment venues' such as bowling, ice skating is relatively limited compared to other forms of leisure activity, however the survey results show that the bowling facilities in Surrey Quays (outside the Borough) and Lewisham town centre are popular facilities. Whilst some parts of the survey area benefit from stronger access to these type of facilities than others, we do not consider there to be a pressing qualitative need for additional provision. Residents to the north of the Borough will inevitably look towards Surrey Quays, and, assuming this type of commercial leisure provision is retained as part of the proposed redevelopment of Surrey Quays, additional provision is unlikely to be required. However, should opportunities for additional provision or enhancement of existing provision come forward, these should be supported, although we would consider Lewisham and Catford town centres as the only appropriate locations.
- Significant spending growth is expected to come forward in the 'restaurants and cafes' leisure category over the study period, with growth in spending of +£506.6m expected (this also includes spending in pubs/bars). This confirms that further provision of this nature will be able to be supported, and indeed may become an increasingly important contributor to the vitality and viability of the Borough's centres. More limited growth is expected to come forward in 'recreation & sporting services' (growth of £78.3m) and cultural services (growth of £42.2m) but this nevertheless represents significant growth which can support new or enhanced facilities.

11 CONCLUSIONS & RECOMMENDATIONS

11.1 This study has set out an up-to-date assessment of the performance of Lewisham Borough's town and district centres, and provides guidance on the quantitative and qualitative 'need' for new retail and commercial leisure floorspace.

11.2 The Council are in the early stages of preparation of their new Local Plan (which will ultimately replace the adopted Core Strategy and suite of other Local Development Framework documents). This study forms a crucial part of the evidence base in accordance with the requirements of the National Planning Policy Framework (NPPF). The information contained within this study will also be used by the Council in assisting with the determination of planning applications for new retail and commercial leisure floorspace across the Borough.

11.3 In this final section, we bring together the analysis set out in the preceding sections of the study in order to draw conclusions and develop a series of key recommendations. Firstly, we summarise the objectives of the NPPF, and highlight the key national trends which we consider are likely to influence and impact upon retail and town centre development in the Borough over the Council's new Local Plan period, to 2033. Finally, we set out strategic recommendations in respect of:

- The borough-wide and town centre approach to the development of new retail commercial leisure floorspace;
- The implications of the changes to permitted development;
- primary and secondary shopping frontages;
- an appropriate centre hierarchy for the borough; and
- an appropriate impact assessment threshold for development of new town centre uses not within a defined centre.

SUMMARY

National and local policy framework

11.4 The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. It also requires local planning authorities to define the extent of the town centres and primary shopping areas, based on a clear definition of primary and secondary frontages, and to ensure that the 'need' for new floorspace can be met in full.

11.5 The London Plan (Consolidated with alterations since 2011, published March 2016) identifies Lewisham and Catford as 'major town centres', and Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross/New Cross Gate and Sydenham as 'district' centres. These allocations reflect those in the Council's own hierarchy of centres (discussed below).

11.6 Lewisham, Catford and New Cross, along with Deptford Creekside, are all identified as 'opportunity areas', i.e. concentrations of brownfield land which have capacity to accommodate new housing, commercial and other development. These 'opportunity areas' are expected to accommodate upwards of 2,500 new dwellings or 5,000 new jobs, or a combination of the two. Lewisham town centre is identified as a location with scope for further intensification, which is now underway.

11.7 Lewisham Council adopted their Core Strategy in June 2011. The document seeks to guide development in the Borough to 2026 and reflects the London Plan's identification of 'opportunity areas'. Reflecting the findings of the Council's previous retail evidence base study, the Core Strategy identifies a requirement for the Council to plan for at least 62,000 sq.m of new retail floorspace by 2026. The Core Strategy seeks to accommodate all of the identified capacity in Lewisham (40,000 sq.m) and Catford (22,000 sq.m) town centres. It is the purpose of this new study to update the previously identified need requirements.

11.8 As noted above, the Core Strategy identifies a hierarchy of centres consistent with the London Plan, and in addition, at the local level, neighbourhood centres are identified at Brockley Cross, Crofton Park, Downham Way, Grove Park and Lewisham Way. These centres were not considered as part of this instruction, but it might be appropriate in the future for the Council to address this level of the town centre hierarchy in order to understand accessibility to key services and sustainability across all communities in the borough.

11.9 The Core Strategy had aspirations for Lewisham town centre to achieve 'Metropolitan Town Centre' status through the development of the identified need (40,000 sq.m), public realm and environment improvements, and the provision of new housing. The London Plan defines a Metropolitan Centre has those with '*wide catchments, which can extend over several boroughs and into parts of the wider South East region. Typically they contain at least 100,000 sq m of retail, leisure and service floorspace with a significant proportion of higher-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure facilities'.*

11.10 The Core Strategy also confirms the Council's aspirations to see significant improvements delivered in Catford town centre. The Core Strategy seeks the 'comprehensive redevelopment' of the area, to include improvements to the physical environment of the area, and the development of up to 22,000 sq m of new retail floorspace. The Core Strategy also confirms support for regeneration aspirations for Lee Green district centre, physical improvements to Sydenham High Street, the development of underused sites in Forest Hill district centre, and the potential for long-term socio-economic change in the Deptford/New Cross areas. The Core Strategy makes it clear that 'major retail development, leisure and related town centre uses, including arts, cultural and entertainment facilities', should be directed towards the major town centres and district centres.

11.11 The Council adopted the Lewisham Town Centre Local Plan (LTCLP) in 2014, which aims to deliver and implement the objectives set out for Lewisham town centre in the Core Strategy. This includes a strategy for accommodating the identified capacity requirements of 40,000 sq.m of retail floorspace and 2,500 additional dwellings. A series of six 'Policy Areas' are identified, and the LTCLP sets out a development strategy for each Policy Area, identifying a desired mix of appropriate uses within specific development opportunities.

11.12 The Council also published a 'Proposed Submission' draft of an equivalent Plan for Catford Town Centre in August 2013, although this has subsequently been withdrawn.

National market trends

11.13 The 'traditional' high street is continuing to face challenges stemming from the impact of the economic downturn, the tightening of retail spending in recent years, and continued, significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents opportunities for high streets to capitalise, through maximising opportunities arising from services such as 'click & collect', and offering engagement with digital technologies through services like free town centre Wi-Fi, ensuring a seamless transition between store-based and virtual shopping experiences.

11.14 Out-of-centre retailing remains a source of competition for spending, as the results of the household telephone survey undertaken in support of this study have confirmed. Many retail parks performed well during the economic downturn, and are increasingly moving towards a more 'mainstream' rather than 'bulky goods' retail offer, with discount stores and fashion retailers increasingly keen to establish representation in out-of-centre locations. Many out-of-centre developments are seeking to increase footfall through a combination of this wider product offer and the introduction of a greater mix of uses, such as coffee shops and casual dining, to encourage footfall and increase dwell times - although the retail parks currently trading in the Borough have not yet seen this diversification.

11.15 More than ever, there is a need for local planning authorities to develop a coherent strategy for their town centres which supports the evolution of the high street away from being solely a focus for retail activity to providing a wider shopping, leisure and cultural 'experience', maximising the benefits of tourist trade (where applicable), and improving the mix of retail and non-retail outlets to increase the length of stay and spend. A number of centres in the Borough have a good commercial leisure mix supporting their core retail function which evidently contributes to their vitality and viability - although both of the Borough's highest order centres - Lewisham and Catford - have a relatively poor mix of commercial leisure uses at present.

11.16 It will be important for town and district centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the Plan period, and to promote and reaffirm their unique selling points. This will help to differentiate their offer from other centres. Heritage, tourism and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.

The sub-regional network

11.17 Lewisham town centre draws £336.5m of comparison goods expenditure from the defined survey area, equating to a market share of 14.9%. This is the highest trade draw figure of those centres located in the borough, and those more comparable and competing centres further afield. Lewisham town centre retains 47.1% of the market share from its 'local' zone, a figure which the Council should seek to improve over the course of its Local Plan period. In terms of Borough-wide retention of comparison goods expenditure, 27.4% of all comparison goods expenditure which is available to residents in the survey area we have used as the basis of our assessment is spent at centres and stores within the Borough.

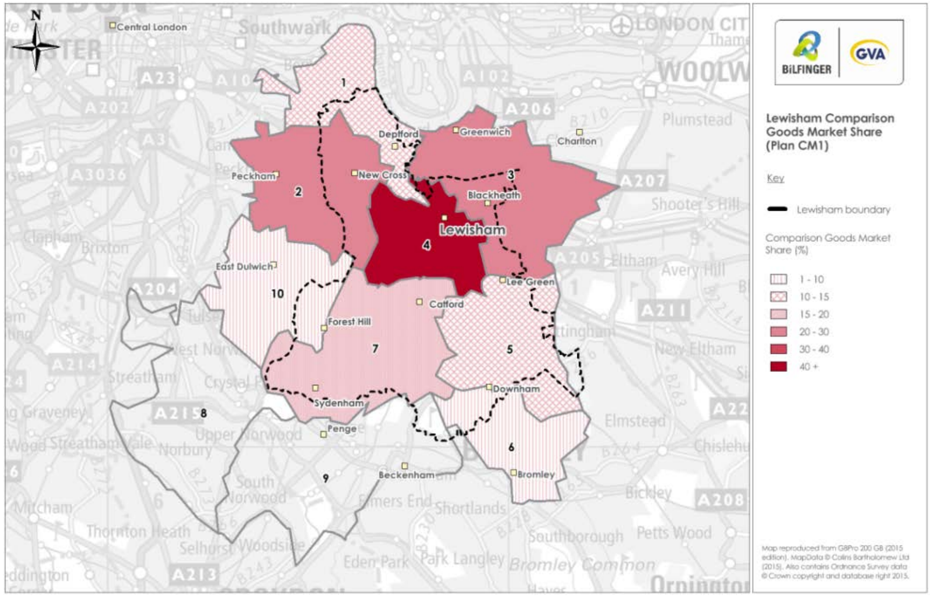
11.18 The main competition for comparison goods expenditure comes from Central London (£290.5m of comparison goods spend from the survey area), and the Metropolitan Centres of Bromley (£281.1m of comparison goods spend from the survey area) and Croydon (£151.2m of comparison goods spend from the survey area). The out-of-centre Regional Shopping Centre, Bluewater has a considerable influence given the distance (15 miles / c.40 minute drive time), (£102.0m of comparison goods spend from the survey area). Central London's retail offer is a global attractor, and therefore loss of expenditure to this location is entirely to be expected; it is unlikely that Lewisham would be in a position to realistically compete with the scale and breadth of the offer available here.

11.19 Croydon is planning a significant comparison goods-led redevelopment of its town centre offer, which is expected to come forward over the course of Lewisham's new Local Plan period. Depending on the scale/quality of the retail offer which comes forward, the development/s could potentially pose a challenge to Lewisham's market share and must be monitored moving forwards.

11.20 Bromley town centre is also in the process of improving its offer, with significant leisure-led developments currently underway. Again, there is some overlap in the catchment of the two centres, and the current proposals for Bromley can be expected to make the centre more of a 'destination' by broadening its non-retail offer. The quality of the retail offer in Bromley is stronger than both Lewisham and Croydon, and its catchment area accordingly stretches over a substantial swathe of south-east London, including the borough of Lewisham.

11.21 Some parts of Lewisham Borough are not well connected to either of these centres and will, by default, continue to look towards Lewisham town centre for their comparison goods shopping needs (particularly those zones in the north of the Borough, e.g. zones 2, 3 and 4). However, for those parts of the study where the catchment areas overlap (such as zone 7), Lewisham risks losing market share if it cannot provide a similarly compelling offer to those coming forward in the surrounding network of centres.

Figure 11.1: Lewisham town centre comparison goods market share by zone



Source: household survey results

11.22 The Council will also need to monitor developments in locations such as Bluewater and Canada Water District Centre, which also both influence shopping patterns over residents in parts of the Borough. Canada Water in particular is a draw from residents in the north of the Borough, and we understand that Southwark Council and British Land are working to deliver a new town centre, to replace the current dated shopping centre and Leisure Park, supporting the aspirations of the Canada Water Masterplan.

BOROUGH-WIDE RECOMMENDATIONS

Need, Impact and the Sequential Approach

- **LB1:** The Council should ensure that the core retail functions of the town and district centres are protected and in some cases enhanced. Active uses on ground floor frontages should be encouraged throughout primary and secondary locations, ensuring contiguous frontages and avoiding changes of use which break up the run of facades.

- **LB2:** We have identified the following borough-wide quantitative 'need' for new comparison and convenience goods floorspace, as follows:

  Comparison goods: between 10,200 sq.m net and 17,100 sq.m net additional floorspace by 2026, increasing to (indicatively) between 28,800 sq.m net and 35,600 sq.m net additional floorspace by 2033.

  Convenience goods: between 9,300 sq.m net and 11,900 sq.m net additional floorspace by 2026, increasing to (indicatively) between 10,100 sq.m net and 12,700 sq.m net additional floorspace by 2033.

  The range of floorspace figures provided above relates to the currently undetermined planning applications for a proposed new development at Lewisham Gateway in Lewisham town centre and for the redevelopment of the Leegate Centre in Lee Green. If planning permission for these developments is granted, the lower range of figures shown above represents the minimum level of net additional retail floorspace required; if permission is not granted, the higher range of figures shown above represents the minimum level of additional net retail floorspace required.

- **LB3:** Ensure a sufficient supply of suitable sites to meet the full extent of need outlined in recommendation LB2. It is important that the need for floorspace is not compromised by limited site availability.

- **LB4:** The identification of sites to meet retail and leisure floorspace need should be subject to the sequential test and, in accordance with the approach set out in the NPPF, London Plan and Council's adopted Core Strategy, directed towards existing town and district centre locations in the first instance, followed by appropriate and well-connected edge of centre sites.

- **LB5:** The impact assessment threshold for new proposals, as set out in the Council's Development Management Local Plan (2014), should be reduced from 1,000 sq.m to 500 sq.m. This will help protect the network of town centres from inappropriate edge and out-of-centre retail and leisure development, ensuring the local authority retains the greatest level of control during the decision making process.

- **LB6:** It is advised that figures towards the end of the Plan period (i.e. beyond 2026) are considered as indicative, and subject to review and update throughout the Plan period. Key inputs into the 'need' assessment, including population, expenditure growth rates and levels of 'special forms of trading' will invariably change according to economic fluctuations. In parallel, shopping and leisure patterns continue to evolve as new development is brought forward across the wider sub-region in competing centres.

Permitted Development

11.23 In considering the above recommendations for supporting the vitality and viability of the network of town and district centres in the Borough we draw attention to the fact that the Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. Of particular relevance, the amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities, such as the Council's Development Management Policy DM14 (District Shopping Centre Frontages) and DM15 (Neighbourhood and Local Centres) which restrict the amount of non-A1 units in a retail centre or frontage.

- **LB7:** The Council's policy framework has effectively protected and enhanced the primary shopping area in recent years, and we recommend the proactive consideration of legislative controls to prevent such a change of use where considered inappropriate and harmful to the vitality and viability of the shopping frontage – i.e. the dilution of A1 uses underpinning footfall and connectivity across a centre. This recommendation is applicable to centres at all levels of the retail hierarchy in the Borough. Consideration should be given to the use of Article 4 directions to assist in the protection of primary shopping frontages.

Primary & secondary shopping frontages

11.24 The Council's Local Plan Policies Map (updated December 2015) identifies primary and secondary shopping frontages within each of the major town centres and district centres which we have considered in this study. Informed by the findings of this study, in particular our observations on the performance of the centres set out in our health check analysis, and the strategic recommendations which we have subsequently arrived at, we make the following recommendations in respect of the current designations of primary and secondary shopping frontages in the Borough's centres (**Table 11.1**).

11.25 For Lewisham, we do not recommend changes to the existing primary shopping frontages in the centre as this area continues to reflect the critical mass of retailing activity in the centre. However there may be merit to extending the primary shopping frontage into the proposed Lewisham Gateway development, should the composition of this end up being largely class A1 retail in nature. Any extension to the frontage must wait until development is complete and units are occupied in order to gauge their role and function.

11.26 It is recognised that much of the new development coming forward at Loampit Vale includes ground floor commercial floorspace. The Loampit Vale area is recognised in policy as evolving into an edge-of-centre policy area, and based on our review of emerging development we recommend this policy allocation is retained. Retail activity in this area will continue to be detached from the existing primary and secondary frontages, and an edge-of-centre allocation will ensure that the Council retains ultimate control over the mix of uses. This policy status will ensure that Loampit Vale remains 'complementary' to retail activity in the primary shopping area rather than competing - as recommended in policy (LTC4). This should be kept under review once development is complete and let and connectivity and pedestrian activity is established.

11.27 In Catford, we recommend a series of minor adjustments to the secondary shopping frontage in various parts of the centre where it is considered the units do not make a significant contribution to the vitality and viability of the centre and therefore their loss to other uses would be acceptable. In Blackheath, Forest Hill and Downham, we recommend minor changes where the units in the locations identified in Table 11.1 have become more orientated towards retail services and other non-class A1 uses in recent years, and therefore a more flexible approach is appropriate.

11.28 In Deptford, we recommend removal of the area of Deptford High Street currently allocated as primary shopping frontage and for this to be reallocated as secondary shopping frontage. This reflects the fact that there is no critical mass of class A1 retail activity along Deptford High Street, but rather a case where the A1 uses are interspersed with other town centre uses. This does not compromise the vitality and viability of the centre – rather, it leads to a varied and diverse mix of uses – but there appears to be little policy merit, in this instance, of the centre requiring primary shopping frontage. This reflects the approach adopted in nearby New Cross Gate, which has a similarly interspersed mix of uses classified as secondary shopping frontage (we also recommend that this approach is adopted in part of New Cross Gate, for consistency).

11.29 The frontage allocations for Lee Green should be reviewed if the proposed redevelopment of the Leegate Centre comes forward.

Table 11.1: Summary of recommendations for changes to primary and secondary shopping frontages

Centre	Recommendations for changes to primary shopping frontages	Recommendations for changes to secondary shopping frontages
Lewisham	• No changes to identified primary shopping frontages • Review following Lewisham Gateway development and extend primary shopping frontages if	• No change to identified secondary shopping frontages • Review following Lewisham Gateway development and extend secondary shopping frontage if

Centre	Recommendations for changes to primary shopping frontages	Recommendations for changes to secondary shopping frontages
	appropriate (depending on mix of uses which comes forward)	appropriate (depending on mix of uses which comes forward) • Possible extension of secondary shopping frontage to Marischal Road (numbers 1-19) aligned to recommendation for improvements to shopfronts and potential development of this area as independent retail quarter • Loampit Vale should not be allocated as secondary shopping frontage. It should remain within the edge-of-centre policy area.
Catford	• No changes to identified primary shopping frontages	• Removal of Brownhill Road from secondary shopping frontage • Removal of all allocations south of Rushey Green / Bromley Road / South Circular junction (secondary shopping frontage would end at 199 Rushey Green)
Blackheath	• Primary shopping frontage to be contracted along Tranquil Vale up to and including nos.33/35 (western side) / junction with Tranquil Passage (eastern side)	• Units north of nos.33/35 Tranquil Vale (western side) / junction with Tranquil Passage (eastern side) should be allocated as secondary shopping frontage
Deptford	• Remove primary shopping frontage allocations along Deptford High Street and reallocate as secondary frontage	• Reallocate all areas currently identified as primary shopping frontage to secondary shopping frontage • No change to existing secondary shopping frontage allocations
Downham	• Remove units south of Downham Way / Bromley Road junction from primary shopping frontage	• Allocate units south of Downham Way / Bromley Road junction as secondary shopping frontage
Forest Hill	• Remove units north of Sainsbury's store on London Road from primary shopping frontage	• Allocate units north of Sainsbury's store as secondary shopping frontage • Allocate any ground floor floorspace arising as a result of redevelopment of Site Allocation SA28 as secondary shopping frontage
Lee Green	• Retain Sainsbury's store as primary shopping frontage • Review primary shopping frontage allocations on Leegate Centre site	• No changes to secondary shopping frontages west of Burnt Ash Road • Review secondary shopping

Centre	Recommendations for changes to primary shopping frontages	Recommendations for changes to secondary shopping frontages
	following centre redevelopment	frontage allocations on Leegate Centre site following centre redevelopment
New Cross / New Cross Gate	• No primary shopping frontage allocations • Review during Plan period if Site Allocations SA5 and SA6 come forward	• No changes to secondary shopping frontages • Review during Plan period if Site Allocations SA5 and SA6 come forward • Consider allocation of nos 109-197 (east side) and 120-182 (west side) of New Cross Road in New Cross Gate as secondary shopping frontage
Sydenham	• No change	• No change

MAJOR TOWN CENTRES

Lewisham town centre — summary and SWOT analysis

11.30 Lewisham town centre is the highest-order comparison goods shopping destination in Lewisham Borough. The centre draws £336.5m of comparison goods spending from the survey area, equivalent to around 15% of total available comparison goods spend available to the survey area. The town centre also draws a modest amount of 'inflow' from beyond the survey area.

11.31 Our health check assessment of Lewisham town centre has identified that it is performing well both qualitatively and quantitatively. The focus of the retail offer is the covered Lewisham Centre, which is functional, albeit somewhat dated. Non-food shopping is the principal reason to visit for 77% of visitors to the town centre and therefore the presence of a strong comparison goods offer is important to the overall vitality and viability of the centre. This point is reinforced by the non-food trading performance of retail floorspace, achieving a sales density of £12,960 per sq.m net – an above expected trading performance for a centre of this scale in the retail hierarchy.

11.32 Vacancy rates are low, with the exception of a few small concentrations in secondary areas of the centre, and the large former BHS unit in the primary shopping area. Market shares from all core and secondary catchment areas across the wider study area have increased since the Council's previous evidence based study. The retail offer is largely lower-to-middle market and does benefit from a number of strong 'footfall driver' anchor stores, including M&S, TK Maxx and Primark. The Sainsbury's supermarket in the Lewisham Centre is an important key attractor which is performing particularly strongly, well above expected company average levels; and the market is identified as an important key attractor contributing to footfall and the breadth and mix of goods in the town centre.

11.33 The redevelopment works at Lewisham Gateway / Loampit Vale are inevitably leading to short-term disruption in the centre. Perceptions identified through the in-centre survey work undertaken in support of this study have confirmed that the construction works have not changed the frequency or patterns of usage of most users of the centre — although 21% of respondents stated that they visit the centre less frequently as a result of the current works. We would expect that the improvements to the centre which will come about as a consequence of the redevelopment works would enable this 'lost' market share to be 'clawed back'.

11.34 The principal qualitative gap in Lewisham town centre is the relative lack of a commercial leisure offer, in particular the absence of a cinema, but also other uses which enhance dwell time in a centre such as cafes, bars and restaurants. The absence of a cinema is particularly noticeable with the household survey identifying that residents are having to travel to Surrey Quays, Greenwich and Beckenham. The opening of the Glass Mill Leisure Centre is an important addition to the wider health & fitness leisure offer, and we understand that some of the floorspace which is expected to come forward at Lewisham Gateway could be given over to the use of class A3/A4 uses, which should assist in addressing some of this shortfall. This representation should be monitored moving forward.

11.35 In **Table 11.2** we set out a SWOT analysis of Lewisham town centre, based on the findings of this study.

Table 11.2: SWOT analysis for Lewisham town centre

Strengths	**Weaknesses**
• Good mid-market comparison goods offer, strong anchor stores • Good range of foodstores • Wide catchment area • Well-supported market • Glass Mill Leisure Centre	• Lewisham Shopping Centre is dated • Many town centre units too small • No cinema • Poor commercial leisure offer (cafes, bars, restaurants) • Limited arts provision • Centre too heavily focussed on retail
Opportunities	**Threats**
• Lewisham Gateway development can introduce larger-format floorspace and new retail / leisure operators • Other opportunity sites that can accommodate future development needs • Closure of BHS is opportunity to attract a flagship retailer/ existing retailer to take more space • Large new residential community – potential different demographics / higher spending power • Scope for development of an independent retail quarter • Embrace digital connectivity – free public wifi, click and collect hubs.	• Lewisham Gateway works have had some impact on visitor patterns • Competing centres' regeneration proposals – e.g. Croydon, Bromley, Canada Water • Existing retail / leisure offer may not be able to fully cater to new residential population – loss of market share to competing centres • Continued polarisation to larger centres • Loss of anchor store as companies review store portfolios • Online shopping, if town centre cannot prove an attractive alternative.

Lewisham town centre — recommendations

- **LTC1:** Continue to support and facilitate appropriate growth and development on central town centre sites in order to retain 'Major Town Centre' status and to improve on the attraction of the retail and commercial leisure offer. This will in turn lead to an improved market share, a wider more extensive catchment area and an improved frequency of visit;

- **LTC2:** Monitor and benchmark the role of Lewisham Town Centre in respect of catchment, scale and the GLA 'retail hierarchy classification criteria', at regular intervals. Aspire to grow and exceed Major Town Centre thresholds whilst recognising and aspiring to exceed all or some of those thresholds at Metropolitan Centre level;

- **LTC3:** The core function of Lewisham town centre as a comparison goods shopping destination should be protected through robust frontage policies. It underpins the wider vitality and viability of the centre and creates the 'critical mass' key to driving footfall and visitor numbers. Such an approach will ensure it is able to withstand the potential increased attractiveness of nearby destinations which compete for market share, most notably Croydon, Bromley and potentially Canada Water.

- **LTC4:** Consistent with London Plan expectations and the Core Strategy policy framework, Lewisham town centre should be the primary focus for accommodating the identified comparison goods capacity requirements for the Borough. This study has identified a total borough-wide comparison goods requirement of up to 35,600 sq.m net at 2033, including a requirement of between 13,300 sq.m net and 18,000 sq.m net at 2033 for Lewisham town centre based on current shopping patterns/market share (the range of figures depending on whether the Lewisham Gateway application is granted planning permission).

11.36 The Lewisham Town Centre Local Plan (LTCLP) has identified that the Policy Areas in Lewisham town centre can collectively accommodate 44,600 sq.m net of class A1-A5 floorspace, as follows:

- Lewisham Gateway Policy Area: 17,000 sq.m[12]
- Loampit Vale Policy Area: 11,200 sq.m net;
- Conington Road Policy Area: 3,000 sq.m net;
- Lee High Road Policy Area: 2,000 sq.m net;
- Ladywell Policy Area: 1,400 sq.m net;
- Central Policy Area: 10,000 sq.m net.

11.37 Once the Lewisham Gateway Policy Area (17,000 sq.m) is removed from this equation on the basis that it has planning permission and is under construction, the physical capacity of the remaining Policy Areas is reduced to 27,600 sq.m net.

- **LTC5:** The identified comparison goods capacity requirements for Lewisham town centre (13,300 sq.m net to 18,000 sq.m net at 2033) can be accommodated within the identified policy priority areas. If a sufficient supply of suitable sites are not available in the rest of the borough's town centres to meet the remaining borough-wide need which this study has identified, there is also capacity for some of this to be accommodated instead within the Lewisham Policy Areas.

- **LTC6:** The Council should continue to work with developers and operators to introduce a cinema facility into the Lewisham town centre in the short-to-medium term, to stem the loss of market share to facilities outside the Borough, primarily at Canada Water, Greenwich and Beckenham.

- **LTC7:** Development of other complementary commercial leisure uses (such as bars, restaurants and so on) allied to a new cinema should be encouraged in order to increase the length of time which visitors spend in the centre, and allow the centre to have a greater role and function outside of retail trading hours.

- **LTC8:** A need has been identified for an improved bowling facility, to replace the dated and poor quality MFA facility. This could potentially take the form of 'boutique bowling' destination in order to differentiate from the offer at Surrey Quays. These are particularly popular, offering a retro style, high end environment with associated karaoke rooms, bars and restaurants. It should be noted that in planning terms the Council can only control the use, but it would be possible to actively market the site and facilitate the introduction of a 'boutique bowling' facility.

- **LTC9:** There is scope for additional smaller format convenience goods floorspace in Lewisham town centre (indicatively in the region of 1,000-1,500 sq m net), over and above the Asda store being brought forward at Loampit Vale. We recommend that this additional floorspace be directed towards the southern side of the town centre (i.e. on Lewisham High Street) in order to assist in encouraging footfall in this part of the centre. If, however, it is brought forward earlier within the Lewisham Gateway development, we do not consider there would be further need elsewhere including in the southern side of the town centre.

- **LTC10:** Applications for new development outside the defined frontages in the centre (the Primary Shopping Area) would need to have regard to the sequential and impact tests set out at paragraph 24 and 26 of the NPPF.

- **LTC11:** The Council should continue to invest in improving the public realm and visual appearance of the town centre. The recent Glass Mill Leisure Centre and new residential developments along Loampit Vale have introduced high-quality public realm into the town centre, and we would expect the Lewisham Gateway development will, once completed, introduce a similar high quality street environment. There is a need for this to be extended throughout the rest of the town centre in order to provide the centre with a coherent feel, rather than 'old versus new', and to assist in navigability and wayfinding.

- **LTC12:** Investment is also needed in improving the visual appearance of shop fronts along Lee High Road, many of which are poor quality and in need of replacement.

- **LTC13:** The Council should seek to secure improvements to the Lewisham Centre in the short-to-medium term. The centre appears to have benefited from relatively limited investment in recent years and, although the centre is well laid out and contains a number of reasonable sized units, its visual appearance is somewhat functional, particularly when compared to the investment which is currently being made in competing centres such as Bromley.

- **LTC14:** Formulate policy to resist the loss of larger units through sub-division within the Primary Shopping Frontage; and facilitate the creation of larger units - through amalgamation, for example (in instances where an application is required) – in order to encourage the representation of key anchor retailers and footfall drivers.

- **LTC15:** There is potential for the area around the Lee High Road / Marischal Road junction to be developed and promoted as a small 'independent quarter'. Where funds are available this initiative should be supported by investment in the upgrading of shop fronts and paving, the introduction of planting, support for temporary/meanwhile uses, and so on. This will help to differentiate the area from the national multiple-focussed Lewisham High Street / Lewisham Centre.

- **LTC16:** Continued support to innovative uses of space elsewhere in the town centre, such as the Model Market, in order to help generate additional footfall outside of retail hours and attract new visitors into the area.

[12] The LTCLP does not specify whether this figure is gross or net, however for the purpose of our analysis we have assumed the figure to be net sales area.

- **LTC17:** The Council should review the defined primary and secondary shopping frontages in Lewisham town centre, in line with the recommendations set out at Table 11.1 of this study.

Catford town centre — summary and SWOT analysis

11.38 Catford shares a policy designation with Lewisham as a 'major town centre' but it is clear that the role and function of the two centres is quite different. Catford is, like Lewisham, an important shopping destination, but has an offer which is much more focussed on meeting day-to-day rather than higher-order shopping needs.

11.39 Dwell times in the centre are typically lower than those in Lewisham, with the majority of visitors to the centre staying for under an hour (in Lewisham most visitors spend between an hour and two hours in the centre). Consistent with its more localised role and function as a shopping location, frequency of visits are generally higher, with two-thirds of visitors to the centre visiting daily or 2-3 times a week (compared to the most popular frequency of visits to Lewisham town centre, which are monthly, fortnightly and weekly).

11.40 Key retail anchors in the centre include Tesco, Aldi, Lidl, Argos, Boots, Iceland and Poundland, and the quality of the overall retail offer is predominantly orientated towards the lower/value end of the market. The vacancy rate in the centre currently stands at 8.5%, below the UK average of 11.2%. The centre also has an important leisure function (owing to the presence of the Broadway Theatre) and civic function (in the form of the London Borough of Lewisham offices), but there is little in the way of complementary facilities such as cafes and restaurants to support these uses. In both the household and visitor surveys improvements in facilities of this nature scored highly when asking what users of the centre would like to see improved.

11.41 The role of Catford as a more localised shopping destination is not problematic in respect of the retail hierarchy. The town centres of Lewisham and Catford are close together, and it would be unlikely for both to operate at the same scale. The London Plan defines a 'major centre' as one which has a 'borough-wide' catchment, and currently Catford does not meet this criteria. There is a need to improve the quality and range of retailing in Catford to ensure that it is fully able to meet the localised/day-to-day shopping needs of the existing and new residential communities in the area.

11.42 The household survey results identify that the principle reason the majority of residents visit Catford is for food shopping, but the large Tesco store which anchors the Catford centre is under-trading and in need of investment. The Tesco store is too large for the centre, particularly in the context of more modern foodstores on the periphery of the centre (Aldi and Lidl), which have strong turnovers and performance levels.

11.43 Previous evidence base studies undertaken on behalf of the Council have indicated that the centre is underperforming, and this evidence base confirms that this continues to be the case. The centre has a comparison goods sales density of just £3,243 per sq m, which is considerably lower than we would expect for a 'major town centre', and whilst not aiming to achieve the same level, compares poorly to Lewisham's sales density of £11,900 per sq m net.

11.44 The household survey results also indicate that the centre has experienced a declining market share from all survey zones relative to the position at the time of the Council's previous evidence base study (for example, a reduction in market share from 10% to 6% in zone 5, and a reduction from 9% to 8% from zone 7).

11.45 The Catford Centre is the focal point of the retail offer. It is a dated, high density concrete shopping precinct which is in need of investment, or at very least extensive modernisation. The acquisition of the Catford Centre by the Council provides the opportunity for it to play an important component in the wider regeneration of the town centre. The environmental quality of the centre is functional, and there are opportunities to qualitatively improve the appearance of this part of the centre and the town centre mix provided, as well as general connectivity and linkages with adjoining frontages.

11.46 A SWOT analysis for Catford town centre is provided at **Table 11.3.**

Table 11.3: SWOT analysis for Catford town centre

Strengths	Weaknesses
• Compact centre which has capability to meet day to day shopping needs • Civic Centre / Broadway Theatre as additional footfall drivers • Good accessibility	• Proximity to Lewisham town centre • Declining comparison goods market share • Existing anchor foodstore (Tesco) is under-performing and out-dated • Poor environmental quality in parts of centre • South Circular acts as barrier to movement • Catford Centre requires redevelopment but likely to be significant cost implications • Lack of café/restaurant offer despite presence of Council Offices and Broadway Theatre
Opportunities	**Threats**
• Opportunity to position itself as a centre which focuses on day-to-day/local shopping needs as Lewisham strengthens its higher order offer • Three development sites within centre which can meet future development needs and contribute to regeneration of centre • Strong local catchment • New residential developments on periphery of centre – additional footfall / spending if offer	• Planned development in Lewisham and Croydon likely to continue to impact on market share unless role and function is redefined • Continued polarisation to larger centres • Closure of Tesco (which is under-performing) would leave centre without an 'anchor' store

of centre can be improved • Enhancement of café/leisure offer would increase dwell time / spend in centre	

Catford town centre — recommendations

- **CTC1:** The Council should continue to promote Catford as a higher-order centre in the Borough. It is recommended that the Council retain Catford as a 'Major Centre'.

11.47 As set out above, we consider that Catford should retain a Major Centre classification in order to support investment. Applications for development of new retail and other main town centre uses in Catford town centre should be considered on individual merits but supported in instances where they will make a positive contribution to the vitality and viability of the town centre, diversifying the overall range of uses, and supporting and enhancing its function as a Major Centre.

- **CTC2:** The Council should plan for the development of up to 2,600 sq.m net additional comparison goods floorspace in Catford. The retail 'need' does not arise until post-2026, but in order to help facilitate the regeneration of the town centre, this requirement should be delivered within the early stages of the Council's new Local Plan period. We would expect that the development of this floorspace would form part of the redevelopment of the Catford Centre, which is the major opportunity site in the centre (see below).

- **CTC3:** Two main development opportunities are identified; these provide a sufficient supply of suitable sites to meet the full extent of comparison goods need identified (2,600 sq.m net by 2033), and could also absorb residual borough-wide need, should this not be accommodated within the Lewisham Town Centre Policy Areas. The opportunity sites are:

    - The Catford Centre;
    - The Plassy Road Island Site.

- **CTC4:** The level of need identified should not deter a higher level of growth in order to support the regeneration of Catford town centre. Improved comparison goods shopping provision can be used to increased market share, which would in turn support additional comparison goods floorspace over and above the 'baseline' need identified.

- **CTC5:** Facilitate the redevelopment or, at minimum, extensive refurbishment and reconfiguration of the Catford Centre. The inclusion of a foodstore should be retained as part of any redevelopment, albeit at a smaller scale to balance the identified supply/demand. The remaining space should provide for a mix of local comparison and service retailing. A sufficient range of unit sizes should be provided, and a comprehensive upgrade to the environmental quality of the centre be delivered.

- **CTC6:** In the medium to longer term, the redevelopment of the Plassy Road Island site represents a significant opportunity for the Council to remodel existing floorspace and accommodate additional comparison goods floorspace, should it seek to plan for an uplift in Catford town centre's comparison goods market share.

11.48 Of the opportunity sites we have identified, the priority for the Council should be the redevelopment/regeneration of the Catford Centre. The other site (Plassy Road Island) presents longer term opportunities which may allow the centre to accommodate additional comparison goods floorspace and increase its market share. We do not consider that planning for such an eventuality should be a priority in the short term, as there is a pressing need to improve the quality of existing retail floorspace rather than deliver significant new comparison goods floorspace, but nevertheless in the longer term there may be scope for further comparison goods provision in the centre at these sites.

11.49 The Plassy Island site currently comprises of retail warehouse-format units set around a surface car park, which are accessible – albeit via relatively poor linkages – from Bromley Road. It is considered that, if the 'opening up' of linkages between the site and Bromley Road could be secured, there is potential for this site to form a stronger eastern anchor to the town centre, introducing modern, large-format comparison goods retail floorspace, potentially as part of a mixed use, higher-density development than currently exists. It is recommended that the Council engage with relevant parties and investigate opportunities for a comprehensive redevelopment of this site as a medium to longer-term objective.

- **CTC7:** Support the introduction of complementary commercial leisure facilities such as cafes, bars and restaurants, in order to increase dwell time, encourage footfall and contribute to an evening economy where possible. There is scope for the recently-pedestrianised Catford Broadway to act as a hub for this type of use, given its close proximity to the Theatre and public transport interchanges.

- **CTC8:** Across the town centre, and subject to funding, the Council should invest in the public realm to improve the overall environmental quality of the centre, and continue to work alongside Transport for London to improve pedestrian movement around the centre, including enhanced crossing facilities. The extent to which this is deliverable will ultimately depend on TfL's long term aspirations for the routing of the South Circular through the centre.

- **CTC9:** The Council should review the defined primary and secondary shopping frontages in Catford town centre, in line with the recommendations set out at Table 11.1 of this study.

DISTRICT CENTRES

Overview and current performance

11.50 Lewisham has an established network of district centres — Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham. The district centres in the Borough are, for the most part, performing well, although most have areas where the Council should seek for improvements to be delivered over the course of the Local Plan period. The district centres vary considerably in their role and function, ranging from Blackheath, which has a particular focus on restaurants and boutique/specialist comparison goods shopping, to New Cross / New Cross Gate, which has a stronger role as a services, entertainment and evening economy centre, partly on account of the presence of Goldsmith's University. The opening of a small Curzon cinema at the Goldsmith's campus is the only cinema provision currently available within the Borough. Centres such as Sydenham and, on a smaller scale Downham, are more 'traditional' in composition, and are both anchored by small supermarkets with a range of supporting day to day shopping and services.

Opportunity sites

11.51 The analysis identified that Lee Green is the district centre with weaker vitality and viability indicators at present. The conclusions in respect of this centre should, however, be considered in the context of the anticipated redevelopment of the Leegate Centre, and if redevelopment of this site comes forward, would likely bring about a clear uplift in the vitality and viability of the centre to arise. However, notwithstanding this, there is a clear need for investment in the environmental quality and public realm in order to raise perceptions and the visitor experience.

11.52 Opportunity sites in the district centres are relatively limited, and in any case development of significant amounts of new retail floorspace in these locations would be contrary to their role and function. Some district centres such as Blackheath are particularly constrained, with no obvious scope for outward expansion. **Table 11.4** provides a summary of the opportunity sites we have identified in the district centres; these are discussed further in our recommendations for each centre which follow subsequently.

Table 11.4: Opportunity sites in District Centres

Centre	Opportunity sites
Blackheath	No identified opportunity sites
Deptford	No identified opportunity sites (except opportunity areas which have planning consent, e.g. Deptford Creekside)
Downham	No identified opportunity sites
Forest Hill	Portakabin site, Waldram Crescent Land at Waldram Place / Perry Vale
Lee Green	Leegate Centre (planning application for redevelopment submitted)
New Cross / New Cross Gate	New Cross Gate Retail Park Land east of New Cross Gate station / Goodwood Road (planning application granted)
Sydenham	Marshall Audi site

Blackheath district centre — summary and SWOT analysis

11.53 Blackheath district centre is a strong-performing district centre, with a particularly strong focus on food and drink, and upmarket 'boutique' comparison goods retailing. The centre is attractive and well-maintained, benefiting from a pleasant setting on the edge of Greenwich Park. However, there little scope for outward expansion of the centre, and the absence of any convenience goods shopping provision is a key qualitative gap. A SWOT analysis for Blackheath is set out at **Table 11.5.**

Table 11.5: SWOT analysis of Blackheath district centre

Strengths	Weaknesses
• Attractive, compact centre • Strong food and drink offer • Niche / boutique retail offer	• Lack of foodstore • Lack of some day-to-day shopping facilities
Opportunities	**Threats**
• proximity to Greenwich Park / Blackheath to increase visitor numbers and spend in local shops	• Lack of development sites means planned investment will be limited • Pressure for conversion of existing class A1 premises to class A3/A4

Blackheath district centre — recommendations

- **BDC1:** Continue to support the vitality and viability of the district centre consistent with its role and function, and having regard to the highly constrained nature of the centre. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.

- **BDC2:** Continue to support the cafes, bars and restaurants sector which makes an important contribution to the vitality and viability of the centre. Further provision of this nature should only be supported in secondary areas of the centre thereby protecting the Primary Shopping Frontage from any further loss of class A1 floorspace.

- **BDC3:** Future opportunities to introduce new convenience goods floorspace in and on the edge of the centre (strongly connected/integrated), either through change of use or new development, should be supported in principle.
- **BDC4:** The quality of the centre's environment is good and indeed its 'village' character is an important contributor to its overall vitality and viability. The Council should seek to maintain and support this.
- **BDC5:** The Council should review the defined primary and secondary shopping frontages in Blackheath district centre, in line with the recommendations set out at Table 11.1 of this study.

Deptford district centre — summary and SWOT analysis

11.54 Deptford has a close geographical relationship with New Cross, and has a more varied retail offer which is better orientated towards meeting local day to day shopping needs. The market in Deptford plays an important part of the overall vitality and viability. Our health check assessments have identified that Deptford is an important hub for the creative industries in south-east London, with a number of art galleries and studio spaces present in the Creekside area, plus important facilities such as the Albany Centre, and community-run assets such as the Deptford Cinema. These all make positive contributions to the vitality and viability of the centre, increasing its user base and providing additional footfall and support for local businesses.

11.55 A SWOT analysis for Deptford district centre is provided at **Table 11.6.**

Table 11.6: SWOT analysis of Deptford district centre

Strengths	Weaknesses
• Good mix of uses • Culturally diverse • Creative / artistic hub • Popular market • Recent investment in centre from Council and operators (e.g. Asda)	• Poor environmental quality in parts • Customers need to travel further for large foodstores (but other centres nearby)
Opportunities	**Threats**
• proximity to Opportunity Areas and recent housing-led development in vicinity of centre will increase customer base and footfall • Spin-off benefits from creative industries — ensure sufficient complementary uses present in centre • Support to community-led initiatives such as Deptford Cinema	• Creative industries may be liable to funding cuts and/or increased popularity of area and may need to relocate

Deptford district centre — recommendations

- **DFDC1:** Do not plan for the development of significant additional commercial floorspace within the centre. Applications which seek to improve/enhance existing floorspace within the centre should be supported in principle.
- **DFDC2:** The Council should continue to support Deptford's role as a creative and artistic hub, building on the recent investment the Council has made in the centre in this respect. Applications for further development / enhancement of these uses should be supported in principle.
- **DFDC3:** Applications for the development of other 'main town centre uses' should be supported in principle providing they will make a positive contribution to the vitality and viability of the centre, and be of a scale appropriate to the role and function of the centre.
- **DFDC4:** Deptford market plays an important role in supporting the vitality and viability of the centre and the Council should continue to support and where possible improve this.
- **DFDC5:** The environmental quality of the centre has improved following investment from the Council but there is a need for further 'smartening up' of the centre, particularly in relation to the appearance of shop fronts in the centre.
- **DFDC6:** The Council should review the defined primary and secondary shopping frontages in Deptford district centre, in line with the recommendations set out at Table 11.1 of this study. We do not consider there to be a need for the Council to allocate primary shopping frontage in the centre.

Downham district centre — summary and SWOT analysis

11.56 Downham is a very small district centre and our assessment and the household survey results demonstrate that it has a much more limited role and function than the other district centres in the Borough, both in terms of its diversity of uses and the extent of its catchment area. A SWOT analysis for Downham district centre is provided at **Table 11.7.**

Table 11.7: SWOT analysis of Downham district centre

Strengths	Weaknesses
• Day to day shopping function • Strong convenience goods offer • Good range of services	• 73 units – limited overall shopping offer • Low footfall • Underperforms against classification as a district centre • Functional environmental quality
Opportunities	**Threats**
• Improve environmental quality, shop fronts, physical appearance and public realm	• n/a

- **DMDC1:** Downham has a more limited role and function than the other district centres in the Borough, but meets day-to-day convenience goods, services and some comparison goods shopping needs, and the Council should continue to support the vitality and viability of the centre.

- **DMDC2:** We do not consider there to be a need to plan for the development of additional comparison or convenience goods retail floorspace within the centre.

- **DMDC3:** Applications which seek to improve/enhance existing floorspace within the centre should be supported in principle where they will make a positive contribution to the vitality and viability of the centre, providing they are of a scale appropriate to the role and function of the centre.

- **DMDC4:** Downham is the smallest of all the Council's district centres and the loss of units to non-town centre uses (such as residential) should be resisted.

- **DMDC5:** The Council should seek to deliver improvements to the environmental quality of the centre, to improve its physical appearance and upgrade the public realm from its current relatively functional level. Improvements to the quality of shopfronts and appearance of units throughout the centre should be encouraged and supported.

- **DMDC6:** The Council should review the defined primary and secondary shopping frontages in Downham district centre, in line with the recommendations set out at Table 11.1 of this study.

Forest Hill district centre — summary and SWOT analysis

11.57 Forest Hill is a strong-performing district centre which benefits from good levels of vitality and viability. The centre has a strong convenience goods function as a consequence of the modern Sainsbury's foodstore and supporting range of specialist independent convenience goods retailers, as well as a developing independent comparison goods quarter along Dartmouth Road, and a good supporting range of cafes, pubs and restaurants. To the north of the centre, the Horniman Museum and Gardens are an important cultural draw for the area.

11.58 The environmental quality of the centre is arguably the area where the centre falls short at present. Paving is of poor quality in parts and the centre lacks a coherent feel. The location of the centre on the South Circular limits the extent to which other environmental improvements can be delivered, but there is scope for investment in wayfinding and navigability around the centre to help create a better sense of place — for example to improve linkages between the district centre and the nearby Horinman Museum, one of the Borough's most significant tourist attractions.

Table 11.8: SWOT analysis of Forest Hill district centre

Strengths	Weaknesses
• Good retail mix • Strong anchor store (Sainsbury's) • Emerging independent retail hub • Proximity to visitor / tourism assets, e.g. Horniman Museum, Havelock Walk • Portas Pilot	• Public realm is poor in parts • South Circular compromises environmental quality • Centre bisected by railway line/bridge • Wayfinding and pedestrian crossing facilities require improvement
Opportunities	**Threats**
• Opportunity sites in secondary areas of the centre to further diversify mix of uses • Scope to capitalise further on proximity to visitor / tourism assets – place marketing, way finding • Disposal of Wetherspoon public house provides opportunity to enhance/improve commercial leisure offer • Forest Hill station forecourt – public realm opportunity	• n/a

Forest Hill district centre — recommendations

- **FHDC1:** Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.

- **FHDC2:** The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.

- **FHDC3:** There are opportunity sites outside the primary shopping frontage which should, if redeveloped, incorporate retail or other A-class uses (except class A5) on the ground floor. In particular, it is considered that the Portakabin site (Waldram Crescent) and the site at the junction of Waldram Place/Perry Vale (adjacent to the rear of Forest Hill rail station) both offer opportunities for mixed use, higher density development.

- **FHDC4:** There is a need for the Council to invest in improving the public realm and navigability of the centre, particularly in respect of the quality of paving and wayfinding.

- **FHDC5:** The Council should work with Transport for London to investigate options for improving pedestrian crossing facilities at the London Road / Dartmouth Road / Devonshire Road junction, in order to enhance pedestrian movements around the centre.

- **FHDC6:** The Council should work with J D Wetherspoon to secure the positive reuse of the Capitol site which is currently being offered for disposal by the company. A need for a small independent/boutique cinema has been identified for Forest Hill, and this site offers a potential opportunity. It's reuse as a small independent/boutique cinema, community theatre, or similar commercial leisure activity, which would diversify uses in the centre and offer improved accessibility to facilities of this nature for residents living in the south of the Borough. If this site does not come forward, the Council should seek a small scale boutique cinema operator elsewhere in the town centre.

- **FHDC7:** The Council should continue to support the initiatives and ambitions of the SEE3 Portas Pilot team. Events, such as Forest Hill Fashion Week and open studios events in the artists' workshops along Havelock Walk help to drive footfall and broaden the appeal of the centre, and should continue to be supported.

- **FHDC8:** The Council should review the defined primary and secondary shopping frontages in Forest Hill district centre, in line with the recommendations set out at Table 11.1 of this study.

Lee Green district centre — summary and SWOT analysis

11.59 Lee Green is arguably the district centre which is struggling for vitality and viability to the greatest extent at present, although the planned investment in the redevelopment of the Leegate Centre will, if delivered, improve the centre, and ideally act as a catalyst for the regeneration of the wider district centre. The redeveloped Leegate Centre will also help diversity uses in the centre by introducing smaller-format retail units, a gym, and community facilities and so on. Aside from the Leegate Centre, we are not aware of any other opportunities for a significant quantum of new retail floorspace to be accommodated within the centre.

Table 11.9: SWOT analysis of Lee Green district centre

Strengths	**Weaknesses**
• Strong 'anchor' store (Sainsbury's) • Some buildings of strong architectural merit	• High vacancy rate • Limited retail mix, especially comparison goods • Centre in need of regeneration • Poor environmental quality in parts • Poor quality shopfronts
Opportunities	**Threats**
• Leegate Centre will provide improved retail mix and deliver much needed physical regeneration • Leegate Centre redevelopment will also enhance consumer choice / improve competition for food shopping • Shopfront enhancement scheme could help extend regeneration benefits of Leegate Centre to the wider district centre	• Leegate Centre needs to be fully integrated with, and support enhancement of, wider Lee Green District Centre, otherwise vitality and viability of remainder of centre could further decline

Lee Green district centre — recommendations

- **LGDC1:** Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.

- **LGDC2:** The Council should support aspirations to deliver an improved Leegate Centre, including the provision of a new foodstore.

- **LGDC3:** The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.

- **LGDC4:** There is a need to improve the environmental quality of the centre, in addition to the improvements proposed by the Leegate Centre. The quality of public realm and outdoors space is generally weak, and shopfronts are of poor quality.

- **LGDC5:** The Council should review the defined primary and secondary shopping frontages in Lee Green district centre, in line with the recommendations set out at Table 11.1 of this study.

New Cross / New Cross Gate district centre — summary and SWOT analysis

11.60 New Cross is a bustling, diverse centre with generally positive levels of vitality and viability. The Council should continue to support this whilst protecting, and where possible enhancing, the range of retail facilities available in the centre, as our assessment has identified a number of qualitative gaps in the retail offer, particularly in terms of the centre's comparison goods retail offer. There is a need for the centre to be 'smartened up' in parts, and a need for improvements to be made to allow better movement of pedestrians through the centre, particularly in the vicinity of New Cross Gate station. The diversity of uses in the centre is heavily orientated towards services units, and is often of poor quality - over 10% of the units in the centre are occupied by fast food takeaways, double the target identified in the Council's Local Plan.

11.61 The under-used New Cross Gate Retail Park site offers a major opportunity for redevelopment/intensification over the course of the Local Plan period. It is recommended the Council investigate this potential opportunity further through discussions with relevant landowners. It is recommended that the site is reconfigured to provide retail uses at the front of the site (fronting onto the A2), potentially with higher density residential development above. The site is the main car parking facility for users of the district centre and therefore an element of car parking would need to be retained as part of any redevelopment. Any redevelopment should continue to incorporate a supermarket of comparable size to the existing Sainsbury's store, as this makes an important contribution in meeting local residents' convenience goods shopping needs – as the only large supermarket serving the local area – and to the overall vitality and viability of the centre (in our household telephone survey, almost two thirds of respondents stated that food shopping was the main reason they visited the centre).

11.62 We set out a SWOT analysis for the centre in **Table 11.10** below.

Table 11.10: SWOT analysis of New Cross / New Cross Gate district centre

Strengths • Diverse centre with broad range of uses • Goldsmith's campus adds footfall / broadens diversity of uses • Public transport interchange • Well-located opportunity sites	**Weaknesses** • Gaps in retail offer mean residents need to travelling elsewhere for non-food shopping • Sainsbury's store poorly located • Low footfall / higher vacancy in New Cross Gate • High proportion of low-grade uses (e.g. class A5) in New Cross and New Cross Gate • Poor pedestrian permeability through centre
Opportunities • New Cross Gate Retail Park – opportunity for intensification (should retain large foodstore) • Public realm improvements where possible • Goldsmith's University campus – further enhancement of linkages / complementary uses	**Threats** • Proposed redevelopment at Canada Water / Old Kent Road may reduce market share • Further loss of A1 floorspace to other uses also likely to reduce market share

New Cross district centre — recommendations

- **NCDC1:** Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre. We do not consider there to be qualitative need to plan for any additional large-format foodstore provision within the centre.
- **NCDC2:** Commercial leisure uses make an important contribution to the vitality and viability of the centre and should be continued to be supported to appropriate levels, whilst ensuring the retail function of the centre is not undermined.
- **NCDC3:** In the medium to longer term, we consider there is an opportunity to redevelop and reconfigure the New Cross Gate Retail Park site in order for it to make a greater contribution to the vitality and viability of the district centre. The potential extension and introduction of the Bakerloo line should be monitored and might alter recommendations for New Cross as set out in this study.
- **NCDC4:** There is currently no primary shopping frontage identified for New Cross / New Cross Gate and we consider this remains a robust approach given the wide variety of uses in the centre. The Council should give consideration to allocating New Cross Gate as secondary shopping frontage in line with the recommendations set out at Table 11.1 of this study.
- **NCDC5:** The Council should consider a strategy to enhancing the physical appearance of the district centre, which should explore options for improving pedestrian movement through the centre, introducing enhancements to public realm where possible, and improvements to the physical appearance of the centre, particularly in respect of enhancements to shopfronts.

Sydenham district centre — summary and SWOT analysis

11.63 Sydenham is a strong performing district centre with a good retail and leisure mix. The foodstores which anchor the centre are performing well, and are the main reason for visiting for approximately 50% of respondents in our household survey. The comparison goods retail mix is also generally strong, and there are no major gaps in the comparison goods offer when considering its role and function as a district centre.

11.64 A SWOT analysis for Sydenham district centre is set out in **Table 11.11.**

Table 11.11: SWOT analysis of Sydenham district centre

Strengths	Weaknesses
• Generally strong retail mix • Two good-sized foodstore • Good services offer • Low vacancy rate • Good environmental quality	• Some shopfront improvements needed
Opportunities • Promote linkages with Kirkdale which has a more complementary, specialist retail offer • Audi garage site is a prominent development opportunity	**Threats** • n/a

Sydenham district centre — recommendations

- **SDC1:** Continue to support the vitality and viability of the district centre consistent with its role and function. Applications which seek to improve/enhance existing retail/leisure floorspace within the centre should be supported in principle, providing they are of a scale appropriate to the role and function of the centre.

- **SDC2:** There is scope for additional commercial floorspace to be provided on the ground floor as part of the mixed-use redevelopment of the Marshall Audi site (allocated site). This is centrally-located within the centre, and is therefore a sequentially preferable location (adjacent to the eastern edge of the primary shopping frontage). We would recommend that the site is used to provide class A1 comparison or convenience goods floorspace at ground floor level. to enhance the provision of cafes and restaurants in the centre should be supported, as there is a qualitative gap in provision of this nature at present. However, such uses should be restricted to secondary frontages in the centre, in order to protect the core retail function of the primary shopping frontage.

- **SDC5:** The Council should seek to protect the retail function in the primary shopping frontage, so as to ensure the centre maintains a diverse range of retail units. The loss of class A1 units to other use classes within the primary shopping area should therefore be resisted. Because of changes to permitted development, the Council may need to consider the use of Article 4 directions to protect the class A1 units in the primary shopping frontage.

- **SDC6:** Sydenham has benefited from Portas Pilot funding (and additional funding from Lewisham Council) to support the development of pop-up/temporary shops in the centre and the introduction of markets, and the work of SEE3 and similar initiatives which assist in encouraging new footfall and broadening the diversity of uses in the centre should continue to be encouraged.

- **SDC7:** The environmental quality of the district centre is generally good at the present time but this should be monitored and continued investment should be made in the centre throughout the Plan period, should funding be available.

- **SDC8:** We do not recommend any changes to the defined primary and secondary frontages in Sydenham district centre.

Recommendations for centre hierarchy

11.65 As we have set out in this report, the existing hierarchy of centres (as set out in the Council's adopted Core Strategy) places Lewisham and Catford as the highest-order centres in the Borough, classifying both as 'major town centres'. Below this, Blackheath, Deptford, Downham, Forest Hill, Lee Green, New Cross and Sydenham are all classified as district centres. We do not recommend any change to this hierarchy.

11.66 Based on the current performance of Lewisham town centre, we agree that there is merit in the Council seeking to promote the centre as a metropolitan centre in future iterations of the London Plan, particularly following completion of the Lewisham Gateway development. The current comparison goods retail offer in the centre is not, however, of sufficient strength to merit a change in policy designation in the immediate future, when assessed against the definition of a metropolitan centre in the London Plan (see paragraph 11.7, above). Nevertheless, with the completion of Lewisham Gateway and the implementation of additional comparison goods floorspace in line with the recommendations of this study, over the course of the Council's Plan period we consider that upgrading to metropolitan centre status could be achievable.

11.67 Given the potential opportunity for development and regeneration we recommend that Catford remains a Major Centre despite the different scale and role of the centre compared to Lewisham. We do not consider that any changes should be made to the position of the district centres in the Borough's retail hierarchy, and **Table 11.12** reaffirms our recommendation to retain the existing retail hierarchy.

Table 11.12: Recommended hierarchy of centres, Lewisham Borough

Position in hierarchy	Centres
Major town centre	Lewisham* and Catford
District centre	Blackheath, Deptford, Forest Hill, Lee Green, New Cross, Sydenham, Downham
Neighbourhood/local centre	Existing local centres

**Lewisham to be reviewed during Plan period with view to upgrade to Metropolitan centre*

Monitoring and next steps

11.68 Our study has identified that, for the most part, the Council's network of higher order centres are performing well, and with the exception of the identified concerns in respect of the performance of Catford town centre and Lee Green district centre (although it is anticipated that redevelopment will come forward in the latter in the short to medium term) there are no fundamental issues of vitality and viability which require addressing. There is scope for environmental improvements across most of the Borough's town centres and the Council should continue to invest in this in order to support the centres' wider vitality and viability.

11.69 It is recommended that the Council should update its retail evidence base at frequent intervals throughout the Local Plan period to 2033, as new information on population growth, expenditure growth and 'special forms of trading' becomes available. Updates to retail capacity forecasts will also be required once new floorspace comes forward in Lewisham town centre, as well as following any redevelopment of the Catford Centre, in order to assess the implications these developments have had on the centres' respective market shares. If large-scale comparison goods floorspace comes forward in competing centres, this will also necessitate an update to capacity forecasts to examine the impact of the development(s) on shopping patterns.