ROYAL GREENWICH RETAIL & LEISURE STUDY

Volume B: Centre Health Checks

Prepared for:

Royal Borough of Greenwich

November 2025

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1. Introduction

1. This appendix provides the findings of qualitative and quantitative assessments of the main centres located within The Royal Borough of Greenwich:

- Woolwich Major Town Centre
- Eltham Major Town Centre
- Greenwich (West Greenwich) District Centre
- Thamesmead District Centre
- Plumstead District Centre
- East Greenwich District Centre
- North Greenwich District Centre
- Lee Green District Centre (Partially within London Borough of Lewisham)
- Blackheath District Centre (Partially within London Borough of Lewisham)

2. The Health Check provides an overview of the relative health of the main centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG states the following twelve KPIs may be relevant in assessing the health of the town centres and planning for the future:

- Diversity of uses
- Proportion of vacant street level property
- Commercial property indicators
- Customers' experience and behaviour
- Retailer representation and intentions to change representation
- Pedestrian flows
- Accessibility
- Perception of safety and occurrence of crime
- State of town centre environmental quality
- Balance between independent and multiple stores
- Barriers to new businesses opening and existing businesses expanding
- Extent to which there is an evening and night-time economy offer.

3. The **Diversity of Uses** is informed by data from Green Street, via the GLA High Streets Data Service and examines the current number of outlets and quantum of floorspace for each commercial category. These categories are Convenience (retail), Comparison (retail), Leisure (including food and drink outlets, entertainment and accommodation) and Service (including health and beauty services, post offices, dry cleaners & laundrettes, travel agents and banking & financial services). Vacancies are also covered. Where there are smaller, concession-style units within larger stores (e.g., Argos within Sainsbury's), the Green Street data does not allocate floorspace to these outlets. Floorspace calculations are therefore based on the store's main use (i.e., the total floorspace of the Sainsbury's store (including the Argos unit within it) will be allocated to convenience retail).

4. **Vacancy rates** are measured two ways; the number of vacant units which is calculated as a percentage of all centre units; and the quantum of vacant floorspace (sqm) and its percentage of all centre floorspace. The vacancy rates are compared against the London average as identified by the GLA High Streets Data Service data. In many cases, the two vacancy rate measurements can vary. For example, the unit vacancy rate may be low and the floorspace vacancy rate may be high, in which case the unit vacancy rate masks a high level of vacancy floorspace. In contrast, a high unit vacancy rate may contrast with a low floorspace vacancy rate, and here it may be the case that unit sizes are too small to support commercial operator requirements.

5. **Pedestrian Flows** uses Footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and General Data Protection Regulation (GDPR) compliant. Data is collected daily and MSCI Property Intel can identify footfall levels at different times of the day. The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange/ red higher concentrations.

6. **Retailer representation** is informed by the site visit as well as the retailer requirements which are obtained from the **Requirement List** where commercial property requirements can be viewed.

7. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.

8. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.

9. Where several of the district centres are of a smaller size and scale, there is consequently less data and insight available, meaning that for some, it is not possible to cover all indicators.

10. The findings of the health check assessments are set out in the following chapters.

2. Woolwich Major Town Centre Health Check

Overview

11. Woolwich is designated as a Major Town Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary runs along the River Thames to the north, down the A205 to the west, before zig zagging up to meet Plumstead Road (A206) and finally moving north at Marshgate Path.

12. Woolwich is located at the northern edge of the Borough, by the River Thames. Plumstead District Centre is located approximately 1km to the east, along the A206. Thamesmead District Centre is located 2.8km north east (15-minute drive). Eltham Major Town Centre is roughly 4.6km south of Woolwich.

13. Significant regeneration and redevelopment is currently ongoing, including the demolition and redevelopment of three estates which are to be replaced by 1,500 new homes (Woolwich Estates Regeneration). The Council has secured almost £25 million of funding from the Department for Levelling Up, Housing and Communities' Future High Street Fund (FHSF) and Historic England's High Streets Heritage Action Zone (HSHAZ), which is being used to make improvements at Powis Street, Beresford Square, Market Pavilion, Royal Arsenal Gatehouse and The Old Town Hall. Woolwich Exchange is the proposed regeneration of the land around the former Woolwich covered market between Plumstead Road and Spray Street, with plans including 801 new homes, a 5-screen cinema and a new public square.

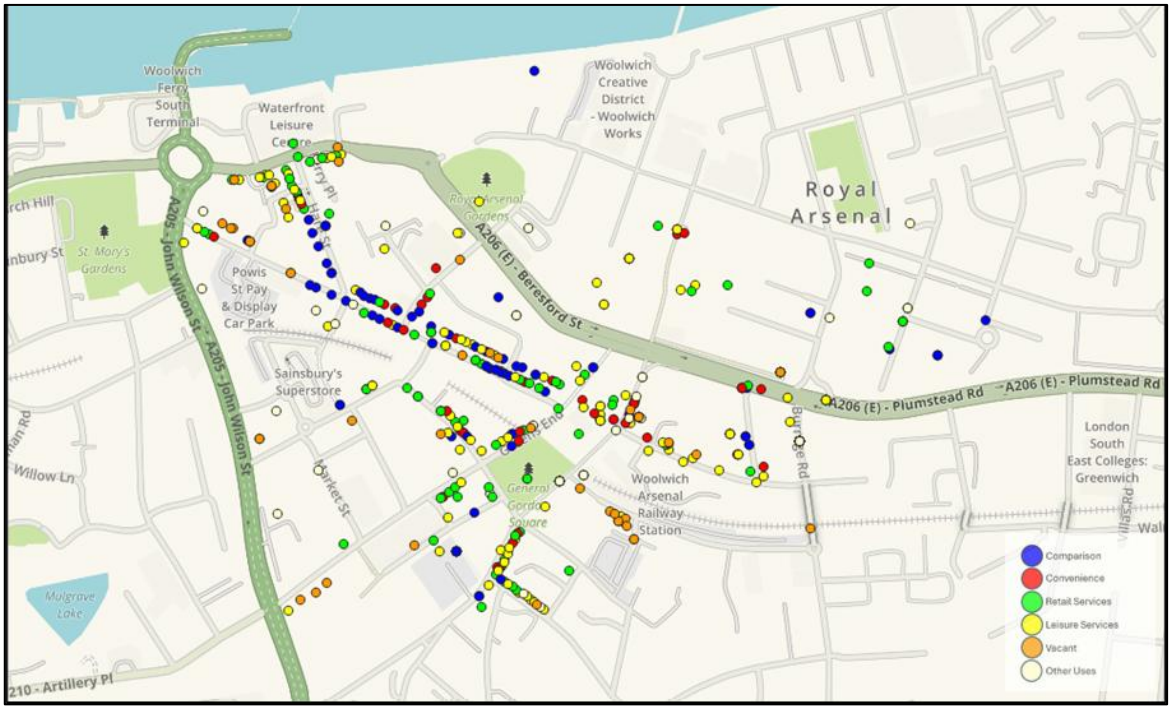
Figure 1: Woolwich Major Town Centre Boundary Map



Diversity of Uses

14. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Woolwich's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 2: Diversity of Uses Map, Woolwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

15. The table below shows that Woolwich has a total of 401 units and an overall quantum of 83,500 sqm in floorspace.

Table 1: No. units and Floorspace in Woolwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Woolwich	London Average		Woolwich	London Average
Comparison	66	16.5%	23.0%	24,190	29.0%	23.7%
Convenience	51	12.8%	12.1%	15,640	18.8%	21.8%
Leisure	106	26.5%	26.4%	16,840	20.2%	25.5%
Service	96	24.0%	24.1%	16,660	20.0%	16.6%
Miscellaneous	40	10.0%	6.4%	4,550	5.5%	3.7%
Vacant	41	10.3%	8.8%	5,470	6.6%	9.6%
Total	400	100.0%	100.0%	83,350	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

16. The proportion of comparison retail outlets is lower than the London average by 6.3 percentage points, while the floorspace is higher than the London average by 5.4

percentage points. Comparison retailers include Primark, occupying 4,910sqms and TK Maxx occupying 2,570 sqm.

17. The number of convenience retail and leisure outlets aligns with the London average with leisure being the most common outlet type. Both categories have less total floorspace than the London average, suggesting the units are generally smaller. Key convenience retailers include Sainsbury's, TFC, Tesco (Extra and Express), Lidl and Iceland, while key leisure retailers include Premier Inn, JD Weatherspoon and Thameside.

Figure 3: Tesco Express Store



Source: LSH Site Visit

Table 2: Food & Beverage Units and Floorspace

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Woolwich	London Average		Woolwich	London Average
Bars, Pubs & Clubs	9	2.2%	2.9%	3,540	4.2%	6.8%
Cafes & Fast Food	58	14.5%	13.1%	6,160	7.4%	7.9%
Restaurants	22	5.5%	7.9%	2,950	3.5%	6.7%
Total	89	22.2%	24.0%	12,650	15.1%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

18. In Woolwich, the food and beverage (F&B) offer occupies almost a quarter of the total units.

19. The number of outlets that bars, pubs & clubs and restaurants occupy is slightly lower than London averages, respectively. The floorspace further widens the gap

with the London average, as they occupy less floorspace proportionately within Woolwich.

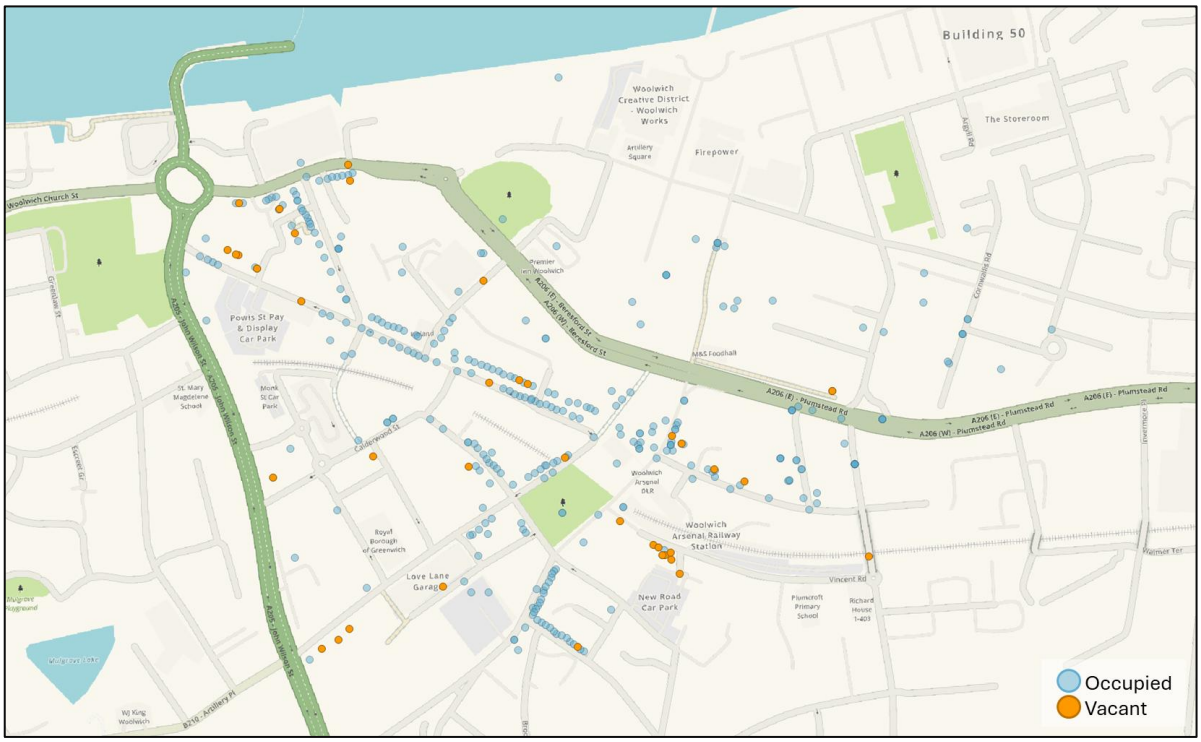
20. Cafés & fast food take the highest number of outlets in F&B with 58 units at 14.5%, slightly above the London average of 13.1%.

Vacancies

21. There are a total of 41 vacant outlets in Woolwich which represents 10.2% of the total retail and leisure outlets. This is higher than the London average of 8.8%. Contrasting to this, the vacant floorspace is 6.6%, below the London average of 9.6%. This may reflect an oversupply of smaller units that are not fit for purpose.

22. The image below illustrates where vacant units are in Woolwich as of November 2024. As can be seen, vacancies are spread across the centre with a couple of clusters. These clusters are north of Powis Street, and at the corner of Vincent Road and Helen Street.

Figure 4: Vacancies Map, Woolwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

23. Following the recent closure of WHSmith in Woolwich, the Post Office no longer has a physical location.

24. Over the years, Greenwich Shopping Park and Brocklebank Retail Park, located with Charlton Riverside, have drawn visitors away from Woolwich, becoming a major competitor.

Multiple and Independent Retail Representation

25. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Woolwich has a good range of national multiples, as set out in the figure below.

Table 3: National Multiples, Woolwich

Dept/Var Stores	Key Fashion Multiple	Key Non Fashion Multiple	Food Stores	Key Café / Resturants Stores
Primark	Decihamm Shoes	3 Store	Iceland	Domino's Pizza
	Foot Locker	Boots	Lidl	Greggs
	JD Sports	Card Factory	Sainsbury's	KFC
	Shoe Zone	EE	Tesco-Extra	McDonald's
	Sports Direct	O2 Phones		Nandos
	TK Maxx	Poundland		
		Poundstretcher		
		Superdrug		
		Vodafone		
		Warren James		

Source: PMA, Local Data Company, as of 27th September 2024

26. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Woolwich has a range of independent outlets; the majority are F&B occupiers, a mix of restaurants and quick service restaurants like Bagel Boss and ViB Bar. A few independent comparison shops can also be found, like MK Mix London and Cell Phone City.

Markets

27. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

28. Woolwich Market is located in Beresford Square and has operated since the 1600s. The market operates Monday to Saturday between the hours of 9am to 4:30pm, selling groceries and clothing. Beresford Square is undergoing a redevelopment aimed at improving infrastructure, public and market space, and introducing new public seating, green spaces, and an interactive water feature.

29. Royal Arsenal Farmers Market in Artillery Square takes place twice a month, on the second and last Saturday at 10am to 3pm. Most of the stalls are farmer produce, locally sourced foods such as baked goods, cheese and flowers with up to 40 stalls of street food and crafts.

Retailer Requirements

30. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 4: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

31. As of February 2025, a review of published operator requirements identified seven retail, leisure and service operator requirements, seeking a combined maximum floorspace of up to 7,460 sqm. These retailers include Traid (second hand clothes), Loon Fung (Oriental supermarket) and Hotpod Yoga. For a comprehensive list, please refer to Appendix C1.

32. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

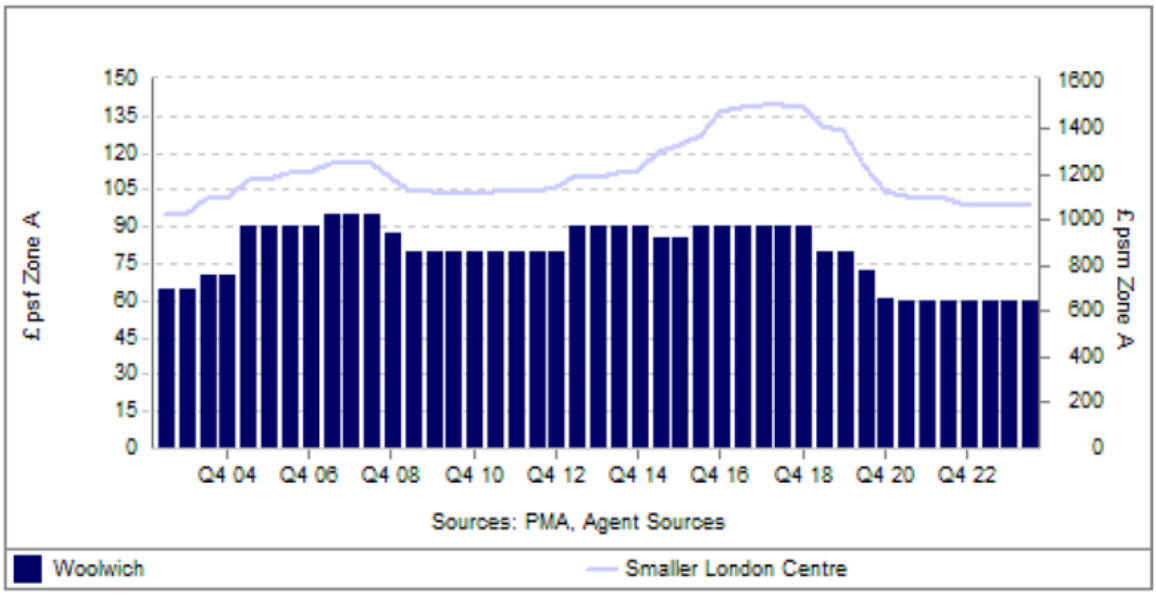
33. It is also possible that these operators are not looking for opportunities in Woolwich specifically, rather they are looking for opportunities in areas similar to and including Woolwich.

34. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Property Indicators

35. Based on agent sources, Property Market Analysis (PMA) estimate that top achievable prime rents in Woolwich were around £645 psqm (£60 psqf) in Zone A as of mid-2024. Zone A is the most valuable space of a retail property. As can be seen within the figure below, prime retail rents in Woolwich have been in decline since 2019 and look to have now stabilised at the current level. Woolwich Zone A rents are underperforming relative to the average across comparable smaller London centres.

Figure 5: Prime Retail Rents, Woolwich

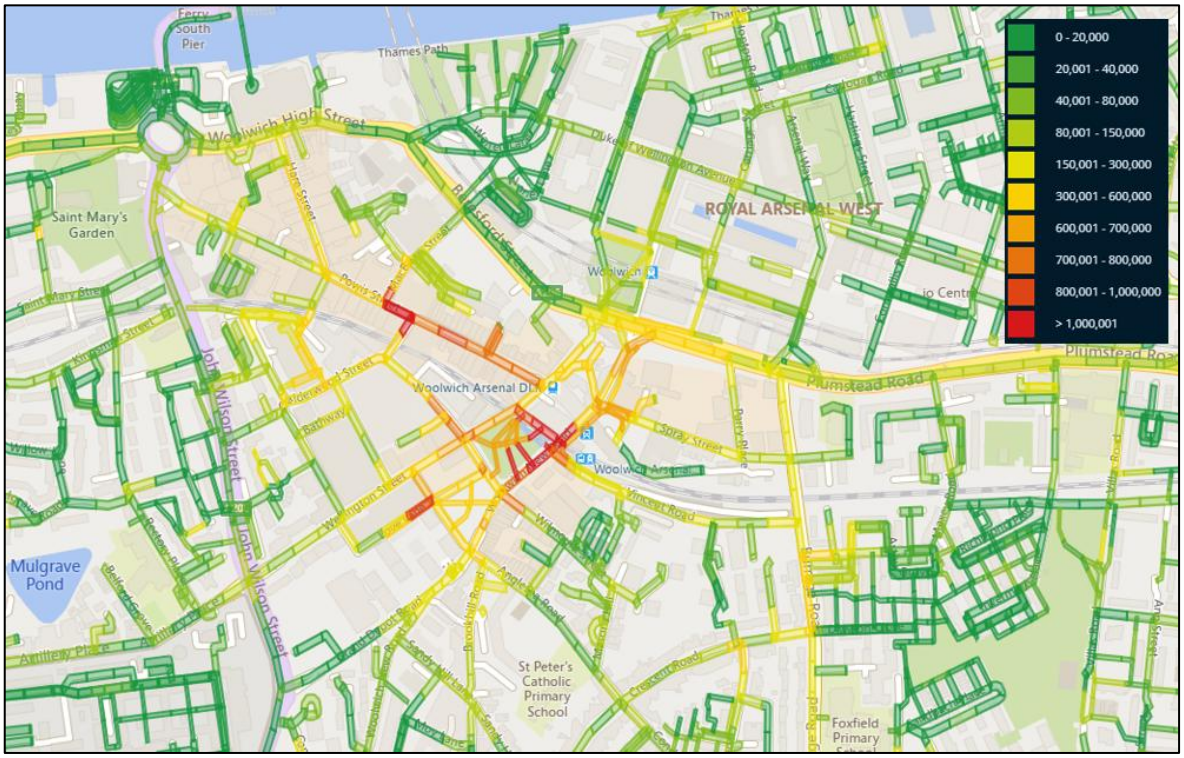


Source: PMA PROMIS Retail Report

Pedestrian Flows

36. The figure below illustrates the pedestrian flows for Woolwich in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall levels are highest along Powis Street, around General Gordon Square (by Woolwich Arsenal station) and at Love Lane.

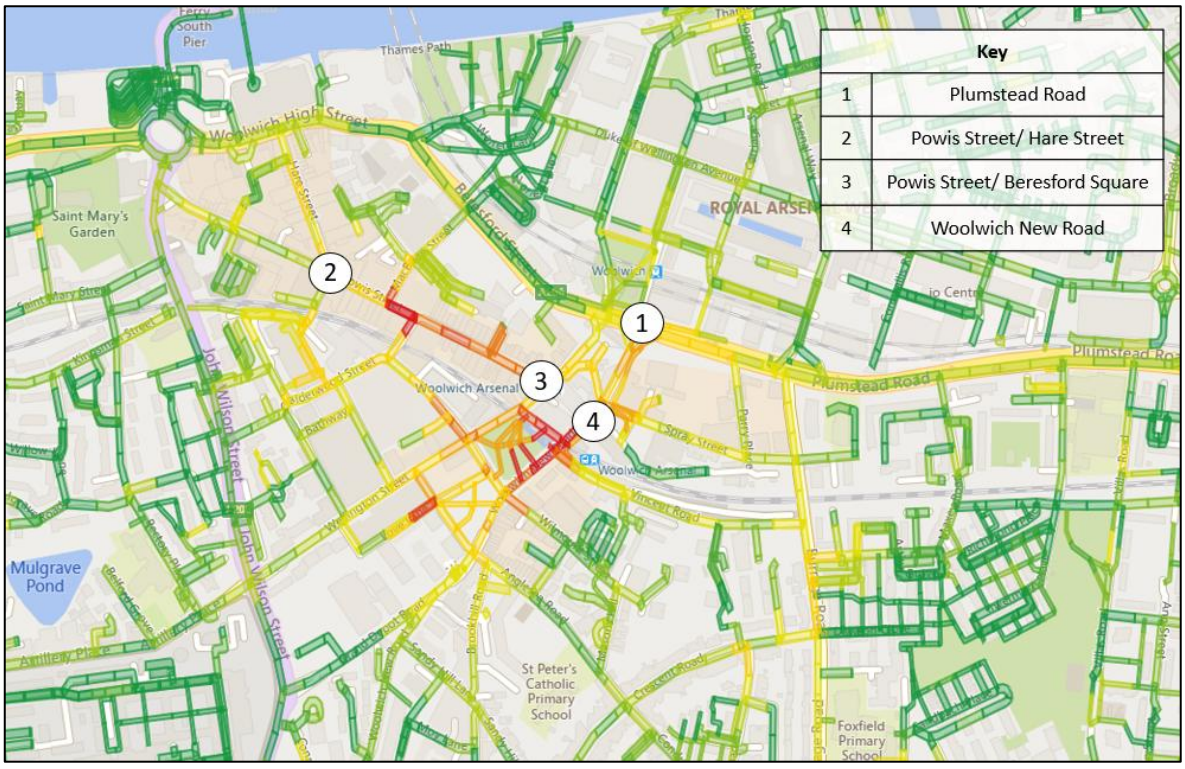
Figure 6: Woolwich Footfall Heat Map, November 2024



Source: Datscha

37. Four locations within the centre have been sampled to assess footfall trends over recent years: Plumstead Road, Powis Street/ Hare Street, Powis Street/ Beresford Square and Woolwich New Road. These locations can be seen mapped in the figure below.

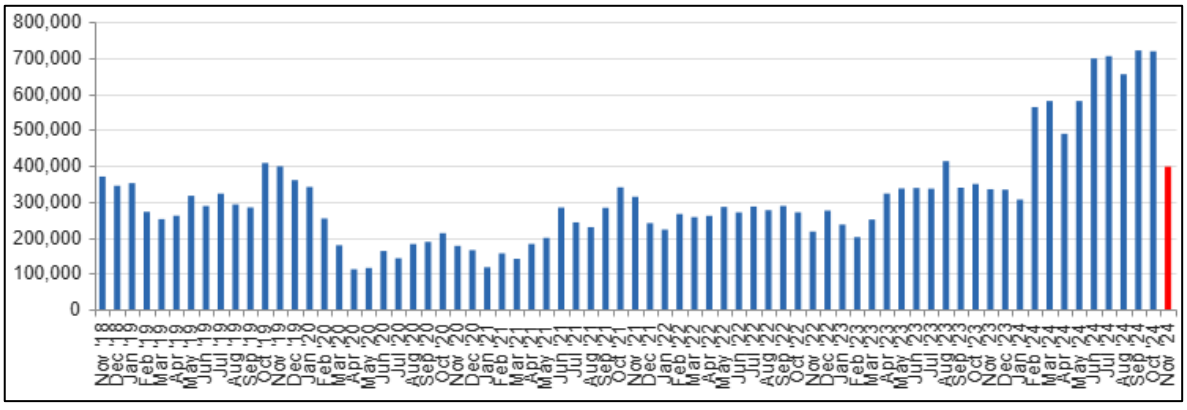
Figure 7: Woolwich Footfall Sample Locations



Source: Datscha

38. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Plumstead Road. As can be seen, pedestrian activity recovered from the Pandemic period well, and has significantly grown in 2024, with some monthly figures topping a count of 700,000.

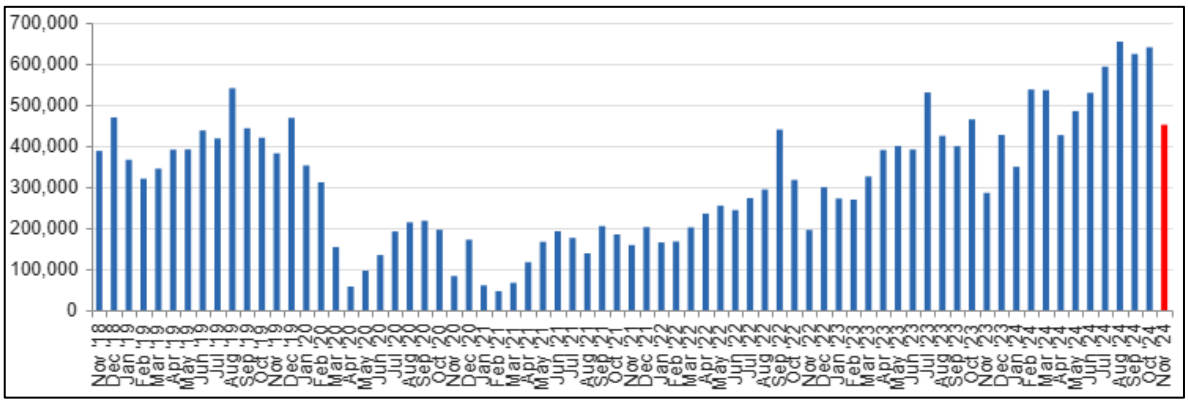
Figure 8: Monthly Footfall Graph, November 2018 – November 2024, Plumstead Road



Source: Datscha

39. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Powis Street/ Hare Street. As can be seen, there was a steady recovery following the Pandemic period. This recovery was complete in 2023, with figures consistently around 400,000. The 2024 figures show further growth, with numbers now surpassing what was seen pre-Pandemic.

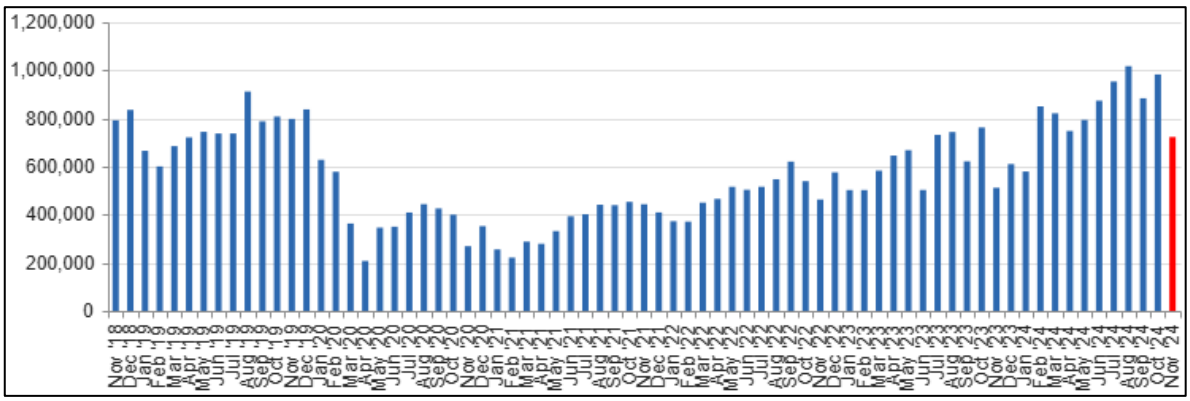
Figure 9: Monthly Footfall Graph, November 2018 – November 2024, Powis Street/ Hare Street



Source: Datscha

40. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Powis Street/ Beresford Square. Similarly to the Powis Street/ Hare Street activity, footfall slowly recovered from the Pandemic across 2021, 2022 and 2023, with 2024 seeing figures beyond those seen pre-Pandemic.

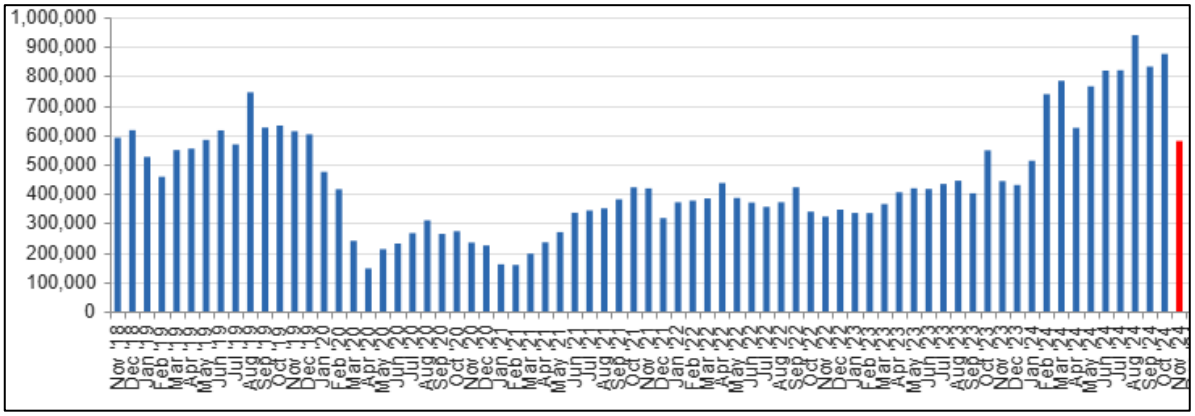
Figure 10: Monthly Footfall Graph, November 2018 – November 2024, Powis Street/ Beresford Square



Source: Datscha

41. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Woolwich New Road. As can be seen, following a drop in pedestrian activity during the Pandemic period, footfall looked to have plateaued from 2021 through to 2023 at a lower level than had been recorded in late 2018 and throughout 2019. However, 2024 figures, particularly between June and October, show strong improvement with monthly numbers consistently surpassing 800,000.

Figure 11: Monthly Footfall Graph, November 2018 – November 2024, Woolwich New Road



Source: Datscha

Accessibility

42. Transport for London's Public Transport Accessibility Levels (PTAL) ranks connectivity across London. The grading has 9 categories from 0 which indicates very poor access to public transport to 6b which indicates excellent access to public transport. The measures include walk to public transport, the reliability of public transport and the number of services within the area.

43. A central point in Woolwich provides a PTAL output of 6b, indicating that public transport is excellent within the area. Woolwich town centre is served well by public transport including ferry, rail, DLR, and bus services within a few minutes' walk from the centre.

Figure 12: Woolwich Arsenal Station Entrance



Source: LSH Site Visit

44. There are two stations - Woolwich station and Woolwich Arsenal. Woolwich station is located off the high street and gives access to the Elizabeth line since its opening in 2022. This provides high speed transportation into Central London and Abbey Wood. Woolwich Arsenal station is located at the bottom of the high street and offers Southeastern train services and the DLR which provides quick services to Bank and City Airport.

45. There is a free ferry service for pedestrians, cyclists and vehicles every 15 minutes that links Woolwich with North Woolwich, where London City Airport is located.

46. A205, A206 and Woolwich New Road are a few of the primary routes for travel with private and public transport.

47. In the town centre, there are numerous public car parks - Powis Street, Calderwood Street, and Monk Street car park providing a total of 603 parking spaces towards the north of the centre. Tesco Extra car park with 441 parking spaces and additional hotel and private car parking surround Woolwich and Woolwich Arsenal station.

48. There is a lack of cycle lanes in the centre for safe access and storage for cyclists. There are some improvements to separate cycle lanes from traffic on Beresford Street and Plumstead Road. There are some cycle racks for storage dotted around in the centre.

49. Pedestrian accessibility throughout the town centre is generally good. Zebra crossings are situated along the ring road and Powis Street is primarily pedestrianised and has wide paths, with traffic restrictions throughout the day. Wide paths around the centre and near the stations enhance safety for pedestrians. There are ongoing improvements on Powis Street and Beresford Street which is currently impacting routes and navigation for those on foot.

50. The Woolwich Foot Tunnel connects Woolwich to North Woolwich and is accessible to pedestrians. The tunnels are fitted with lifts, the south lift has been available 94% of the time in 2024, whereas the north lift has not been available since 2022 - creating challenges for those with mobility issues or carrying heavy items.

Environmental Quality

51. The environmental quality of Woolwich is mixed, with a blend of modern and traditional architecture, public realm improvements being made along Powis Street and Beresford Square as well as areas of concentrated vacant units and neglect.

52. Site visit images below capture new developments as well as traditional architecture, improvements to the public realm along Powis Street, welcoming public spaces and clear signage/ wayfinding.

Figure 13: Examples of Strong Environmental Quality



Source: LSH Site Visit

53. Site visit images below capture examples of low-quality areas of the centre, with vacant units, fencing around neglected buildings and a general lack of greenery and vibrancy.

Figure 14: Examples of Weak Environmental Quality



Source: LSH Site Visit

Evening and Night Time Economy

54. A strong evening and nighttime economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre.

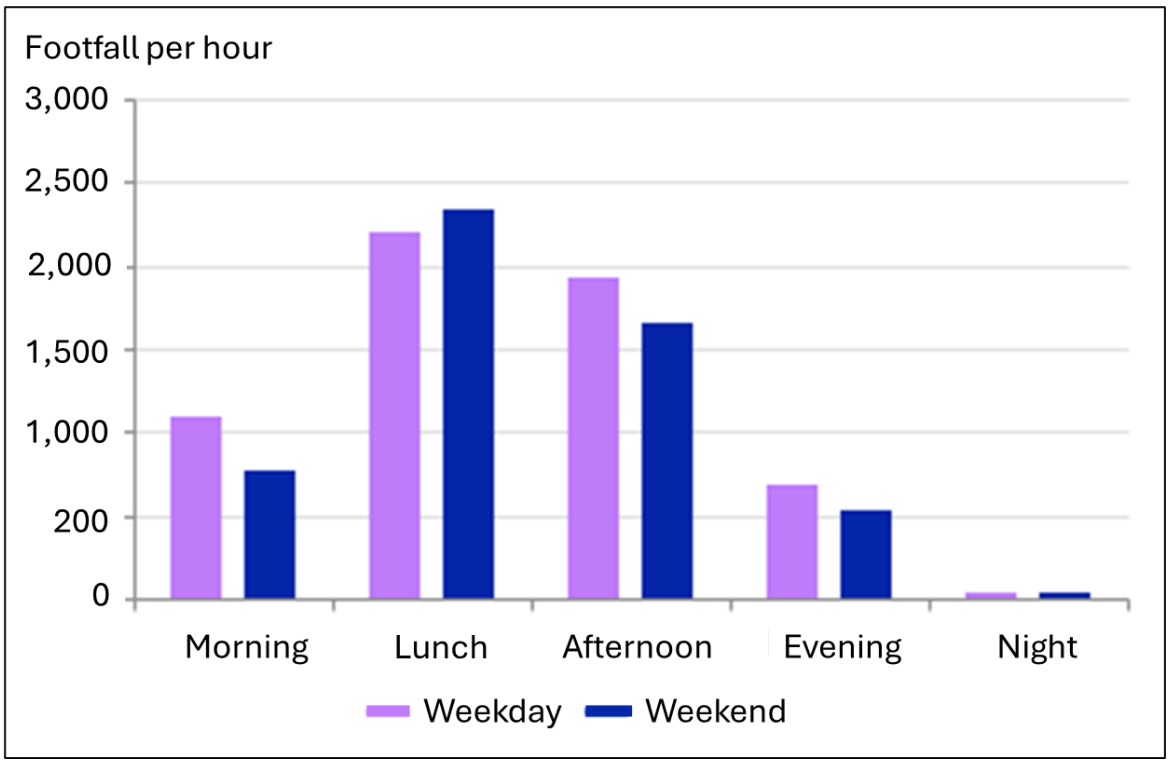
55. The evening and night time economy is limited in Woolwich as there are no clubs and only one bar (Classic Lounge) present (open till 2:30am on the weekends). There are a couple of pubs, primarily located nearby to the train stations, which are open late at night.

56. There are two leisure venues in Woolwich that contribute to the evening economy - Woolwich Snooker Club and AT VR. Woolwich Works (located North of Woolwich, outside the centre) is an events venue that occasionally hosts a range of activities such as concerts, comedy nights, karaoke, dance classes, and theatre shows.

57. Royal Greenwich secured £130,000 of funding from the Mayor's Night Time Enterprise Zones programme to create Woolwich Lates – a scheme designed to boost evening activity. 29 Woolwich Lates events were organised, which attracted over 13,000 people, boosting 6pm - 9pm visitor footfall by 25% and spend by 63% (Night Time Enterprise Zones Evaluation, February 2024).

58. The figure below shows how footfall levels differ across different parts of the day. It relates to footfall in November 2024, at the eastern end of Powis Street. As can be seen, footfall in an evening (5pm – 9pm) drops off pretty significantly, to a level below that of the morning, lunch and afternoon. More activity is seen on weekday evenings than weekend evenings.

Figure 15: Footfall by Time of Day, Powis Street, November 2024



Source: MSCI

Conclusion

59. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Investment into public realm improvements
- Low rate of vacant floorspace
- Good food & beverage offer
- Good presence of national multiples retailers and independent retailers
- Footfall growth across multiple parts of the centre
- Strong public transport links
- Good examples of signage and supportive wayfinding.

Weaknesses

- Vacancy rate of units is above the London average, although vacant floorspace is below average, which may reflect an oversupply of smaller units that are not fit for purpose
- Clusters of vacant units creating areas of neglect and low activity within the centre
- Closure of WH Smith and the impact on the Post Office service
- Declining retail rental values in recent years.

Opportunities

- Ongoing residential developments and future potential opportunities for more will boost population and subsequently catchment spend
- Increasing accessibility with Cycleway 4 extension, creating a continuous segregated cycle route between Greenwich and Woolwich
- Diversify the uses in the centre to support bringing vacant units back into use (e.g., education and health care uses)
- Exploring meanwhile uses as a short-term solution to activating vacant units
- Capitalise on the retailers who are interested in gaining representation within the centre
- Build on the successes of the Woolwich Lates scheme to boost the centre's image as an evening destination.

Threats

- Competition from nearby retail parks (Greenwich Shopping Park and Brocklebank Retail Park) that offer more convenient access for those visiting by car
- High/ increasing business operating costs
- Further loss of physical presence of national multiples following difficulties for the likes of WHSmith, Wilko and Body Shop
- The growth in online shopping and its impact on brick-and-mortar retail outlets.

3. Eltham Major Town Centre Health Check

Overview

60. Eltham is designated as a Major Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary area stretches east to west from Westmount Road to just beyond Sherard Road along Eltham High Street (A210) and north to south from just north of Dobell Road to North Park along Court Road and Well Hall Road (A208).

61. Eltham is located within the southern half of the Borough, roughly 4.6km south of Woolwich Major Town Centre. The nearest district centres are Lee Green (approximately 2.9km west) and Blackheath (approximately 3.5km north-west).

62. Changes in recent years include the opening of Vue cinema (6-screens) along Eltham High Street in 2019 and a £6.6 million high street improvement scheme which was completed in 2017. Looking ahead, plans have been approved for development at 10 Orangery Lane which will deliver new flexible work space, 7 new homes, retail and/or commercial leisure units, a 35-room hotel and improvements to public realm.

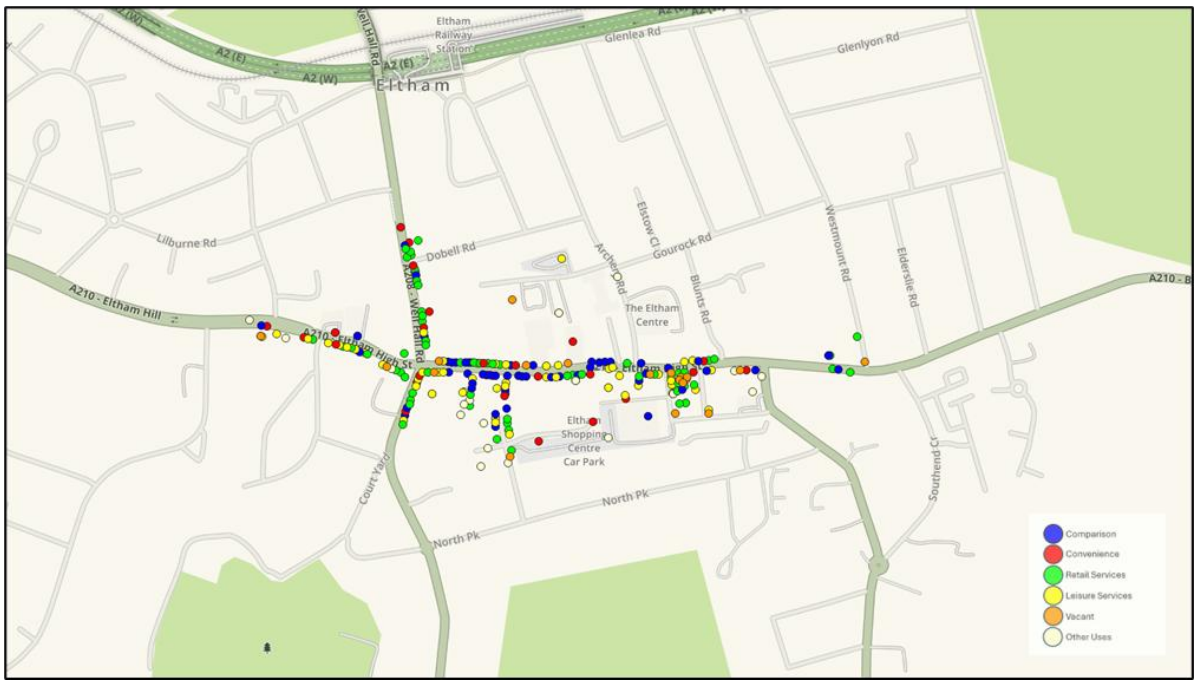
Figure 16: Eltham Major Town Centre Boundary Map



Diversity of Uses

63. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Eltham's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 17: Diversity of Use Map, Eltham



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

64. The table below shows that Eltham has a total of 246 units and an overall quantum of 59,200 sqm in floorspace.

Table 5: No. units in Eltham

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Eltham	London Average		Eltham	London Average
Comparison	52	21.2%	23.0%	22,180	37.6%	23.7%
Convenience	28	11.4%	12.1%	15,110	25.6%	21.8%
Leisure	53	21.6%	26.4%	10,230	17.3%	25.5%
Service	71	29.0%	24.1%	6,910	11.7%	16.6%
Miscellaneous	22	9.0%	6.4%	1,800	3.0%	3.7%
Vacant	19	7.8%	8.8%	2,800	4.7%	9.6%
Total	245	100.0%	100.0%	59,030	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

65. Comparison and convenience retail units are marginally below London averages however the total floorspace exceeds the average, with comparison floorspace being notably higher by 13.9 percentage points. 53 comparison and 28 convenience units collectively account for over 50% of the total retail space, amounting to 37,460 sqm. Consequently, the floorspace allocated to other categories is below the average.

66. In terms of convenience, Marks & Spencer takes the largest floorspace at 7,930 sqm, followed by Sainsbury's at 5,230 sqm. In terms of comparison, TK Maxx, Sports Direct and Poundland are key outlets.

67. Leisure units are 4.9% below, and floorspace is 8.2% below the London average, suggesting that the town centre has slightly lower leisure offer than the norm.

Table 6: No. of Food & Beverage Units in Eltham

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Eltham	London Average		Eltham	London Average
Bars, Pubs & Clubs	8	3.3%	2.9%	4,000	6.8%	6.8%
Cafes & Fast Food	24	9.8%	13.1%	2,460	4.2%	7.9%
Restaurants	14	5.7%	7.9%	2,430	4.1%	6.7%
Total	46	18.7%	24.0%	8,890	15.0%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

68. Cafes & fast-food units are the most prevalent offer of food & beverage in Eltham. These include McDonalds, German Doner Kebab and Tasty Cafe.

69. In terms of number of outlets and floorspace cafes & fast food and restaurants are slightly lower than the London averages.

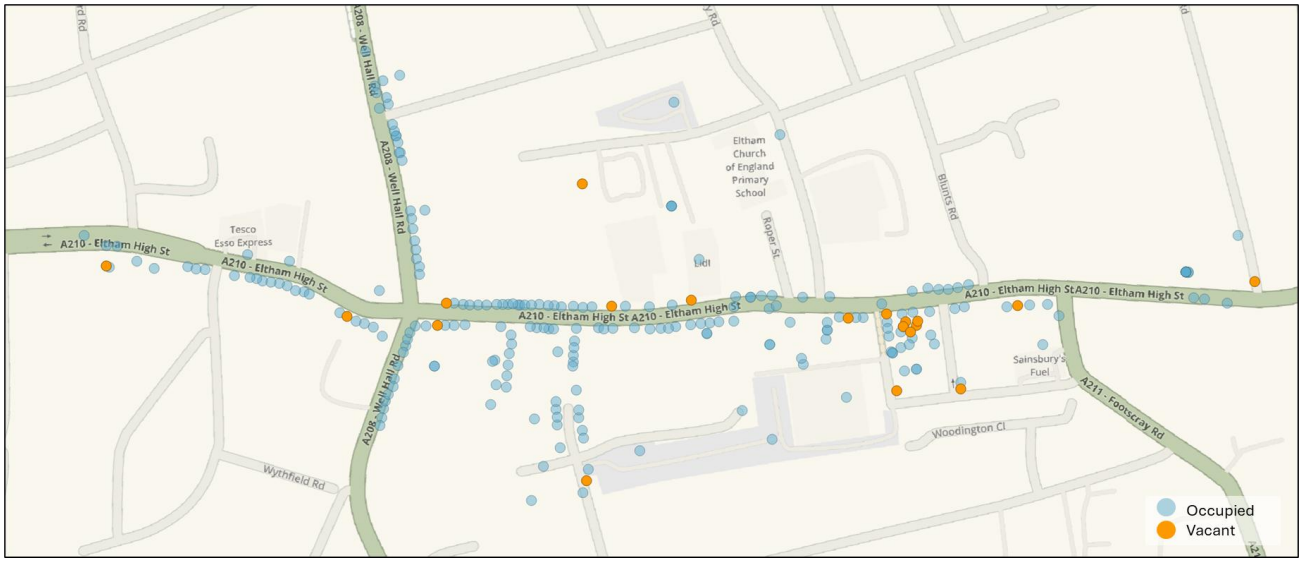
70. The number of 'bars, pubs & clubs' outlets is slightly higher than the London average while the floorspace taken aligns with the London average. Key operators include Portobello Brewing, Eltham Terrace club and Park Tavern.

Vacancies

71. There are a total of 19 vacant outlets in Eltham which represents 7.7% of the overall outlets and 4.7% of the floorspace. It is significantly below the London floorspace average.

The image below illustrates where vacant units are located in Eltham as of November 2024.

Figure 18: Vacancies Map, Eltham



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

72. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S.

Figure 19: Argos Store



Source: LSH Site Visit

73. The table below shows that Eltham has major national multiples that are commonly found in a town centre, like M&S and Boots, offering a mix of premium and affordable options.

Table 7: National Multiples, Eltham

Dept/Var Stores	Key Fashion Multiple	Key Non Fashion Multiple	Food Stores	Key Café / Resturants Stores
Marks & Spencer	JD Sports	3 Store	Iceland	Burger King
	Sports Direct	Argos	Lidl	Costa
	TK Maxx	Boots	Sainsbury's	Greggs
		Card Factory		KFC
		EE		McDonald's
		O2 Phones		Nandos
		Poundland		Pizza Express
		Superdrug		
		Vodafone		
		WH Smith		

Source: PMA, Local Data Company, as of 27th September 2024

74. Eltham has a number of charity stores, including Save The Children and Barnardo's, contributing to second-hand shopping in the town centre.

75. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Eltham has a range of independent F&B outlets, including Tasty Cafe, Totti and Ziyafet. Most of the outlets cater to essential needs, such as pharmacies and electrical goods. There is a variety of international convenience stores like Eltham International Market and Anna Polski Sklep.

Markets

76. Eltham Producers market is located in the centre of the town, off the high street in Passey Place. The market runs once a month on the last Saturday of the month, from 10am to 3pm. The stalls are mainly fresh produce and handmade goods.

Retailer Requirements

77. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 8: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

78. As of February 2025, a review of published operator requirements identified 13 retail, leisure and service operator requirements, seeking a combined maximum floorspace of up to 9,392 sqm. These retailers include Deichmann (shoes), Cook (frozen meals) and Travelodge (hotel). For a comprehensive list, please refer to Appendix C1.

79. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

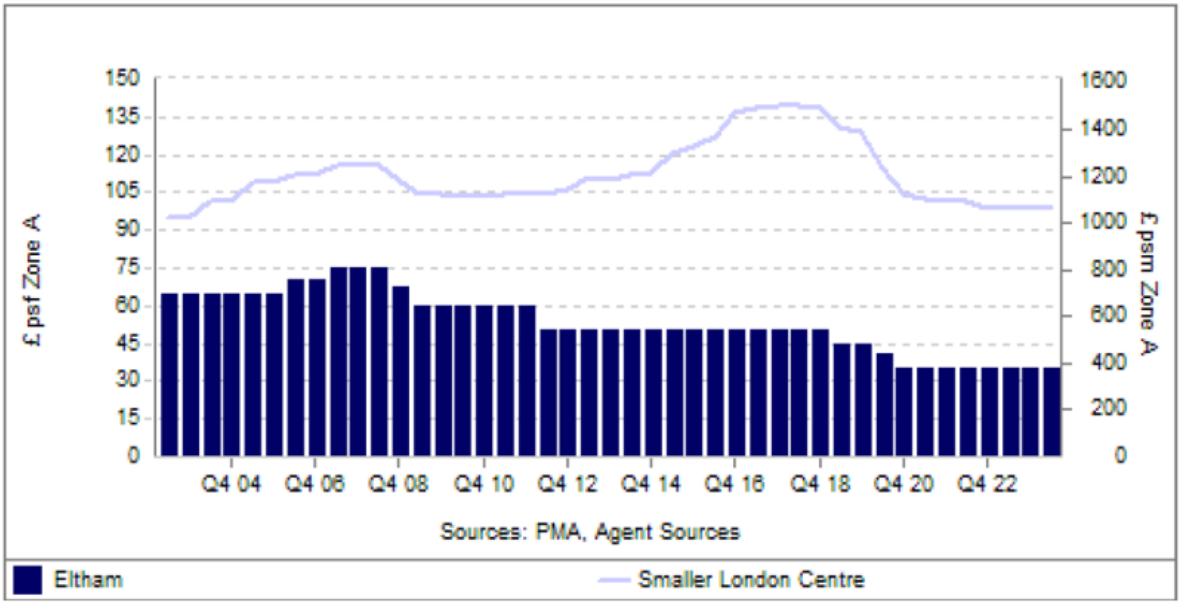
80. It is also possible that these operators are not looking for opportunities in Eltham specifically, rather they are looking for opportunities in areas similar to and including Eltham.

81. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Property Indicators

82. Based on agent sources, PMA estimate that top achievable prime rents in Eltham were around £375 psqm (£35 psqf) Zone A as of mid-2024. As can be seen within the figure below, prime retail rents in Eltham have been in decline since 2008. Eltham is significantly underperforming when compared to other smaller London centres.

Figure 20: Prime Retail Rents, Eltham



Source: PMA PROMIS Retail Report

Pedestrian Flows

83. The figure below illustrates the pedestrian flows for Eltham in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall activity is highest nearby to Marks & Spencer, TK Maxx and Iceland.

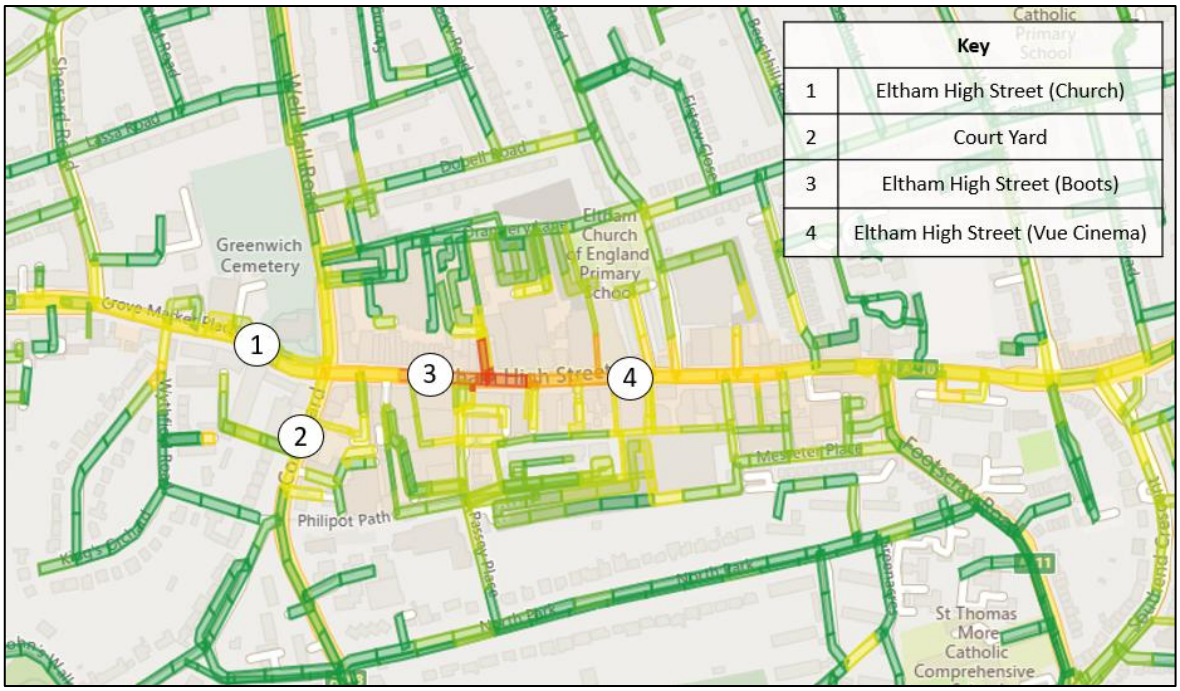
Figure 21: Eltham Footfall Heat Map, November 2024



Source: Datscha

84. Four locations within the centre have been sampled to assess footfall trends over recent years: Eltham High Street (Eltham Parish Church), Court Yard, Eltham High Street (Boots) and Eltham High Street (Vue Cinema). These locations can be seen mapped in the figure below.

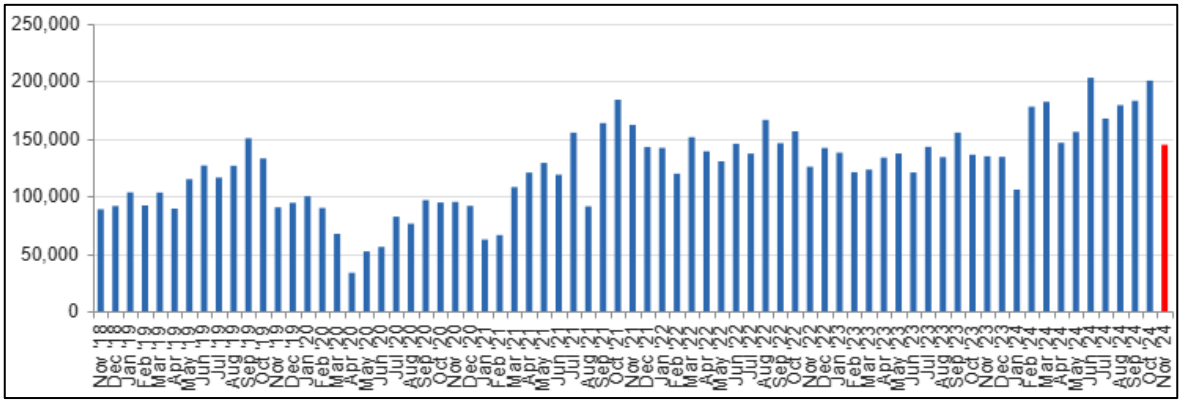
Figure 22: Eltham Footfall Sample Locations



Source: Datscha

85. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Eltham High Street (Eltham Parish Church). As can be seen, following a couple of dips that relate to the Pandemic period, footfall levels have recovered well and now consistently better the figures that were seen in late 2018 and throughout 2019.

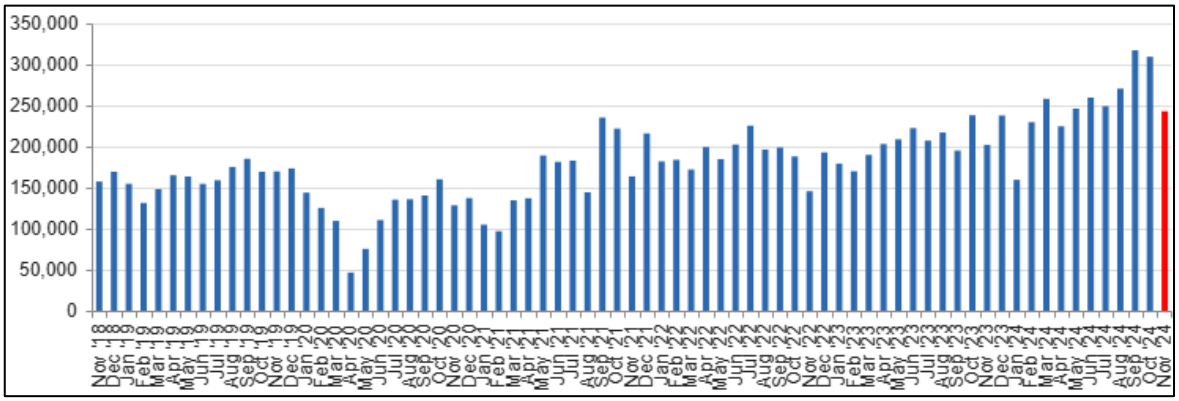
Figure 23: Monthly Footfall Graph, November 2018 – November 2024, Eltham High Street (Church)



Source: Datscha

86. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Court Yard. As can be seen, footfall levels have fully recovered from the Pandemic period. In fact, from late 2021 onwards, they have surpassed monthly figures seen in late 2018 and throughout 2019, with 2024 seeing further growth in activity, with monthly figures surpassing 300,000 on two occasions (September and October).

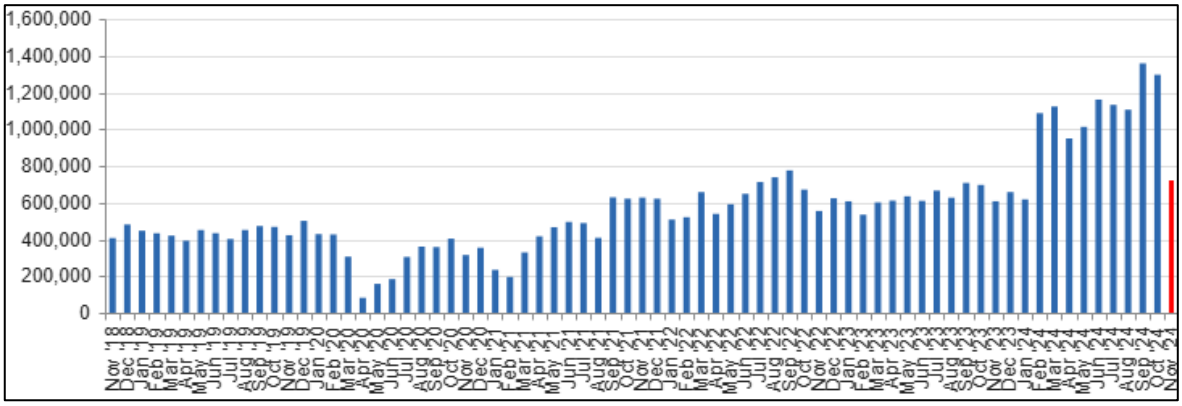
Figure 24: Monthly Footfall Graph, November 2018 – November 2024, Court Yard



Source: Datscha

87. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Eltham High Street (Boots). As can be seen, footfall recorded well from the Pandemic period, and look to have plateaued across 2021, 2022 and 2023 at a level slightly higher than seen pre-Pandemic. 2024 however saw significant growth, with monthly figures regularly surpassing 1 million.

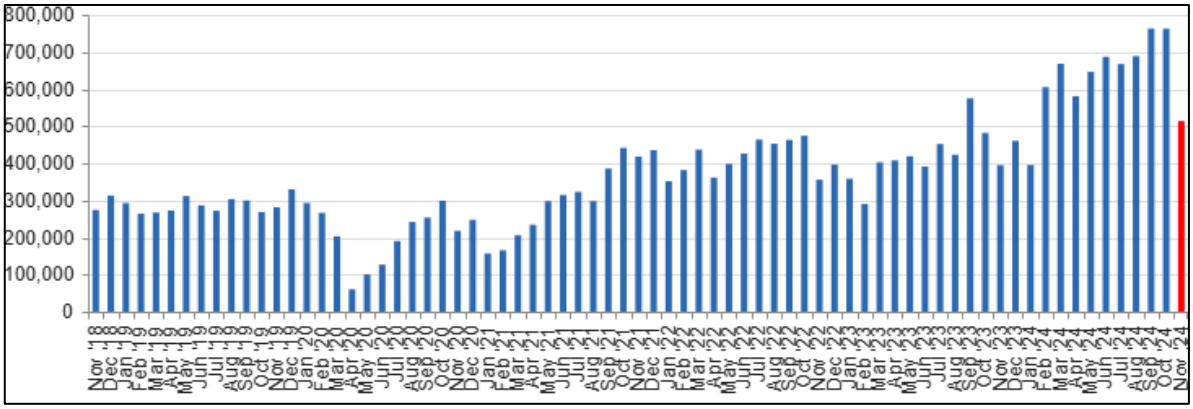
Figure 25: Monthly Footfall Graph, November 2018 – November 2024, Eltham High Street (Boots)



Source: Datscha

88. The figure below shows how footfall levels have changed between November 2018 and November 2024 at Eltham High Street (Vue Cinema). As can be seen, footfall levels have fully recovered from the Pandemic period. From late 2021 onwards, they have surpassed monthly figures seen in late 2018 and throughout 2019, with 2024 seeing further growth in activity, with monthly figures surpassing 700,000 on two occasions (September and October).

Figure 26: Monthly Footfall Graph, November 2018 – November 2024, Eltham High Street (Vue Cinema)



Source: Datscha

Accessibility

89. A central point in Eltham provides a PTAL output of 6a, indicating that public transport is very good within the area. The score does drop quickly as you move out of the centre. Eltham town centre is located near to Eltham station (circa 0.3km), with trains running into Central London: Charing Cross, Waterloo East, London Bridge and Victoria Stations.

90. Bus stops strategically run along the high street. Regular buses are available connecting to Bromley, Catford, Sidcup, Bexleyheath and Greenwich, a night bus (N21) offers late night access to and from Central London.

91. The high street is surrounded by up to 700 parking spots, served by M&S, Lidl and Sainsbury's, Orangery Lane and Eltham Centre car parks. Towards the north of the town centre, Eltham station has a car park.

92. A road splits Eltham High Street, which can be used by private vehicles, which leads to increased traffic and potential safety concerns. A cycle lane is limited to Eltham High Street, which stops at Eltham Hill.

93. Passey Place is partially pedestrianised; it allows for tables and seats to be laid out and market stalls to go up for Eltham Producers Market.

Environmental Quality

94. The environmental quality of Eltham is fair, with a generally good blend of new and old architecture, examples of signage, traffic calming measures and ample provision of street furniture.

Figure 27: Examples of Stronger Environmental Quality



Source: LSH Site Visit

95. There are however examples of vacant units and buildings that detract from the environmental quality of the centre.

Figure 28: Examples of Weaker Environmental Quality



Source: LSH Site Visit

Evening and Night Time Economy

96. Eltham Town Centre is served by seven pubs that are located along Eltham High Street and Passey Place. Later operating venues include Eltham Terrace Club (a sports bar that operates till 2am every day) and Mark's Sky Bar which is located above Vue Cinema (open until 12am Wednesday and Thursday and 1 am on Friday and Saturdays) and is a more premium bar in comparison to the rest of the offering in Eltham. With the addition of an escape room operating from 10 am till 10pm, there are relatively few venues that support the evening economy, resulting in a relatively modest night time scene.

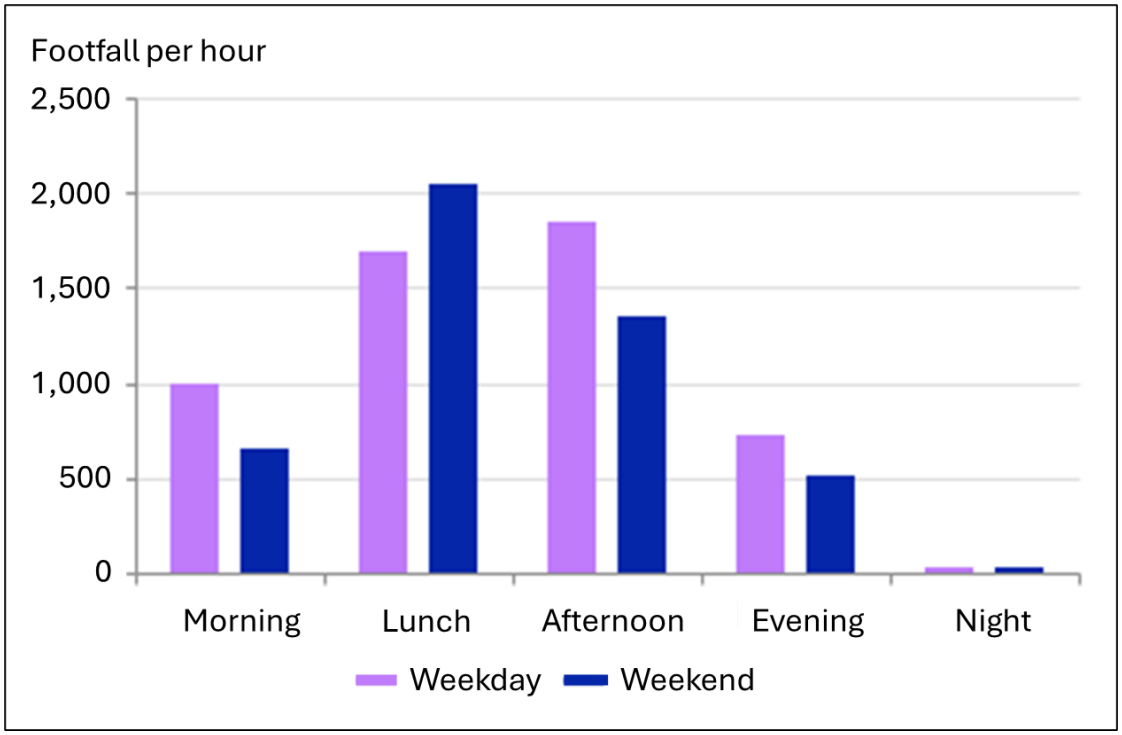
Figure 29: Eltham GPO Pub



Source: LSH Site Visit

97. The figure below shows how footfall levels differ across different parts of the day. This relates to footfall in November 2024, at a central point within the centre, along High Street. As can be seen, footfall in an evening (5pm – 9pm) drops off pretty significantly, to a level below that of the morning, lunch and afternoon. More activity is seen on weekday evenings than weekend evenings.

Figure 30: Footfall by Time of Day, High Street, November 2024



Source: MSCI

Conclusion

98. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Investment into high street and public realm improvements
- Cinema as a key entertainment and leisure venue
- Low vacancy rate (particularly floorspace)
- Strong comparison retail offer (floorspace coverage)
- Good representation of national multiples and presence of independent retailers
- Footfall growth seen across the centre in recent years
- Good public transport links.

Weaknesses

- Weaker food & beverage offer when compared to London averages
- Retail rental values have been declining since 2008, and Eltham significantly underperformed when benchmarked against comparable centres

- Moderate evening and night time economy activity.

Opportunities

- Development opportunity at Orangery Lane to bring new retail & leisure units, a hotel and public realm improvements
- Capitalise on the retailers who are interested in gaining representation within the centre.

Threats

- High/ increasing business operating costs
- Further loss of physical presence of national multiples following difficulties for the likes of WHSmith, Wilko and Body Shop.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.

4. Blackheath District Centre Health Check

Overview

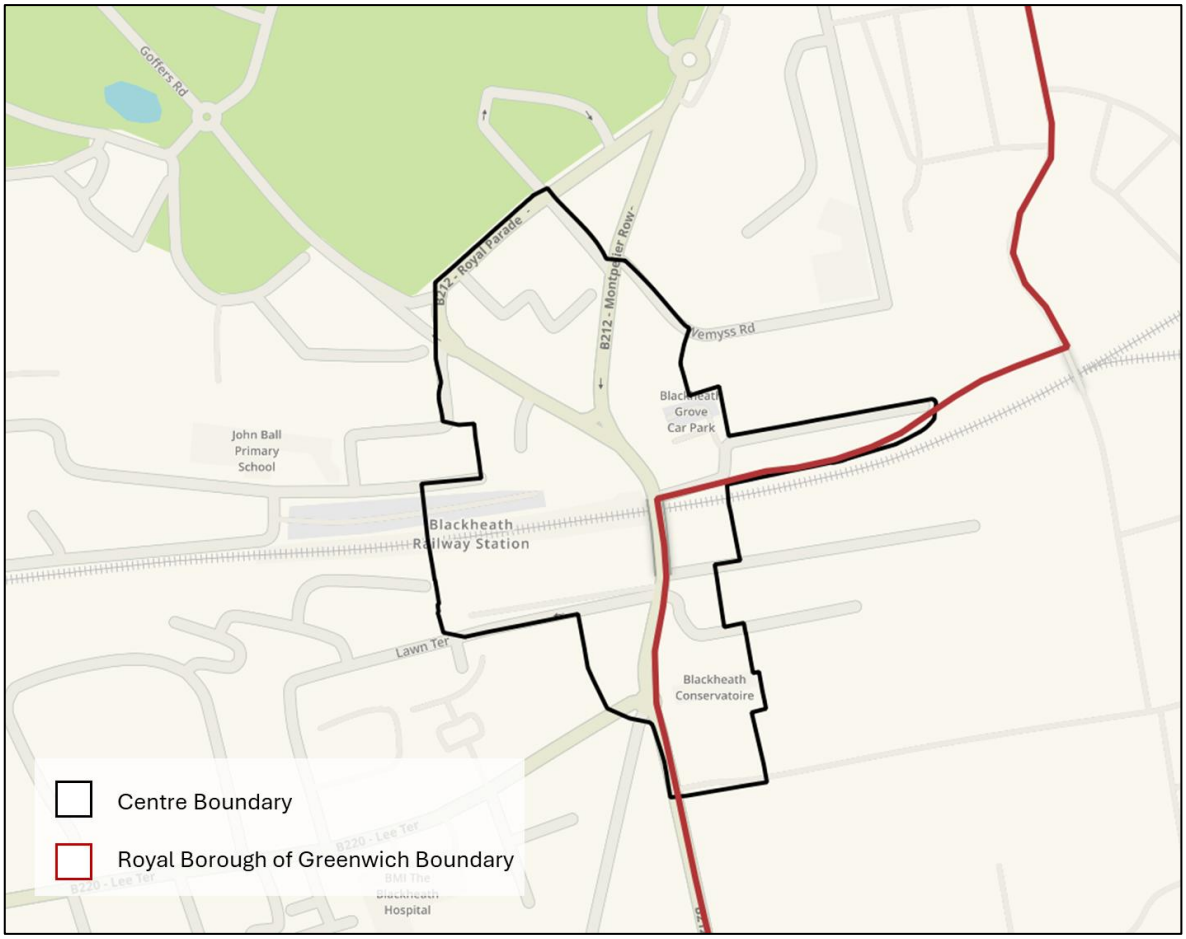
99. Blackheath is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary runs from Blackheath Park to the south up to Royal Parade to the north, encompassing Blackheath station in the middle.

100. Blackheath is located at the western edge of the Royal Borough of Greenwich, with a significant portion of retail outlets outside the borough boundary, falling into the London Borough of Lewisham.

101. For the purposes of this health check, the district centre in its entirety will be assessed. Eltham Major Town Centre is located approximately 3.5km south-east of the centre, with Woolwich Major Town Centre circa 4.6km north-east.

102. Proposals have been put forward to LB Lewisham for development on the site of the current train station car park, which would include new homes, a dedicated market square, reduced car parking provision associated with the station and pedestrian linkage routes.

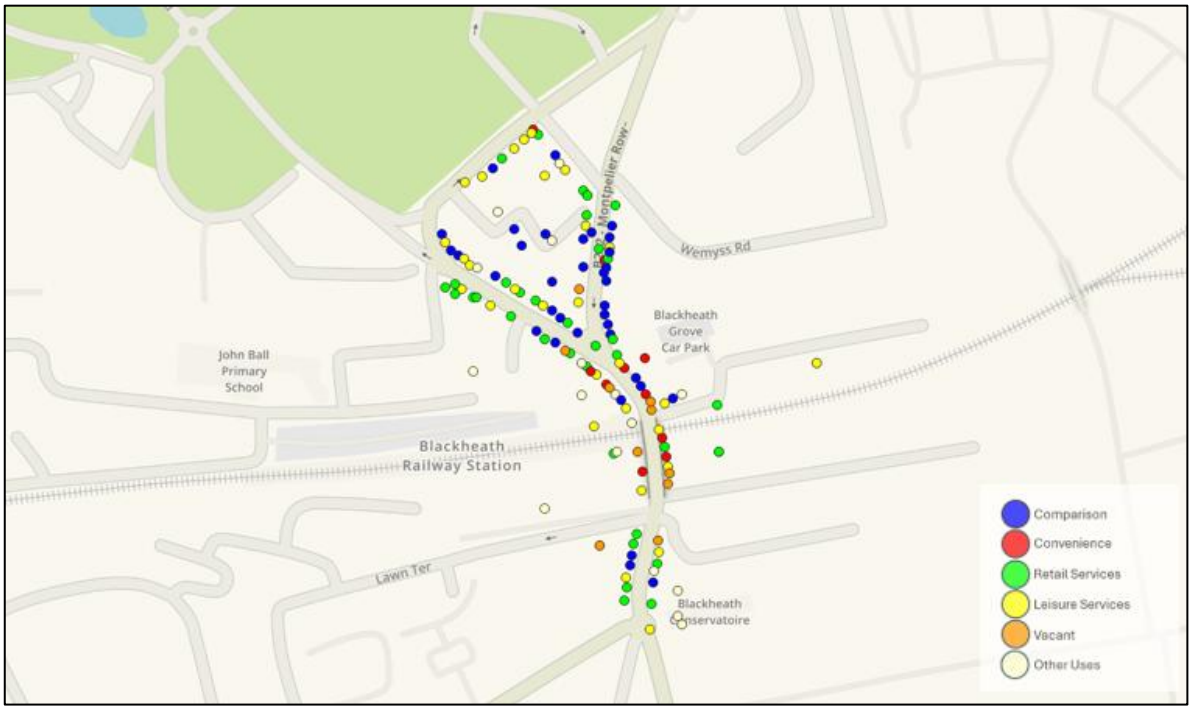
Figure 31: Blackheath District Centre Boundary Map



Diversity of Uses

103. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Blackheath's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 32: Diversity of Uses Map, Blackheath



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

104. The table below shows that Blackheath has a total of 140 units and an overall quantum of 17,440 sqm in floorspace.

105. The proportion of convenience retail outlets is below the London Average and further exacerbated in floorspace. Convenience outlets include Gail's, COOK and Snack Health.

106. Leisure outlets are below the London average, however above for floorspace covered. Key operators in Blackheath are Blackheath Halls, The Old Bakehouse Theatre, O'Neill's, Shepherd Neama and Cote.

Table 9: No. of Units in Blackheath

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Blackheath	London Average		Blackheath	London Average
Comparison	35	25.0%	23.0%	3,950	22.6%	23.7%
Convenience	13	9.3%	12.1%	1,300	7.5%	21.8%
Leisure	30	21.4%	26.4%	5,100	29.2%	25.5%
Service	35	25.0%	24.1%	3,510	20.1%	16.6%
Miscellaneous	16	11.4%	6.4%	1,350	7.7%	3.7%
Vacant	11	7.9%	8.8%	2,230	12.8%	9.6%
Total	140	100.0%	100.0%	17,440	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

Table 10: No. of Food & Beverage Units in Blackheath

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Blackheath	London Average		Blackheath	London Average
Bars, Pubs & Clubs	4	2.9%	2.9%	1,040	6.0%	6.8%
Cafes & Fast Food	12	8.6%	13.1%	900	5.2%	7.9%
Restaurants	12	8.6%	7.9%	1,960	11.2%	6.7%
Total	28	20.0%	24.0%	3,900	22.4%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

107. Bars, pubs & clubs are aligned with the London average. Number of outlets is at 2.9% and floorspace is at 6%. Operators Shepherd Neame, Castle pub, O'Neill's and Le Bar A Vin.

108. Number of outlets and floorspace for restaurants are slightly overrepresented in Blackheath, compared to the London average. Key operators include Cote, Zero Degrees and Franco Manca.

109. Cafes & fast-food is below the London average in terms of number of outlets and floorspace. It occupies the same number outlets as restaurants (12 outlets), which is atypical with the London average results, as Café & fast food occupies more units and floorspace.

Figure 33: The Crown Pub



Source: LSH Site Visit

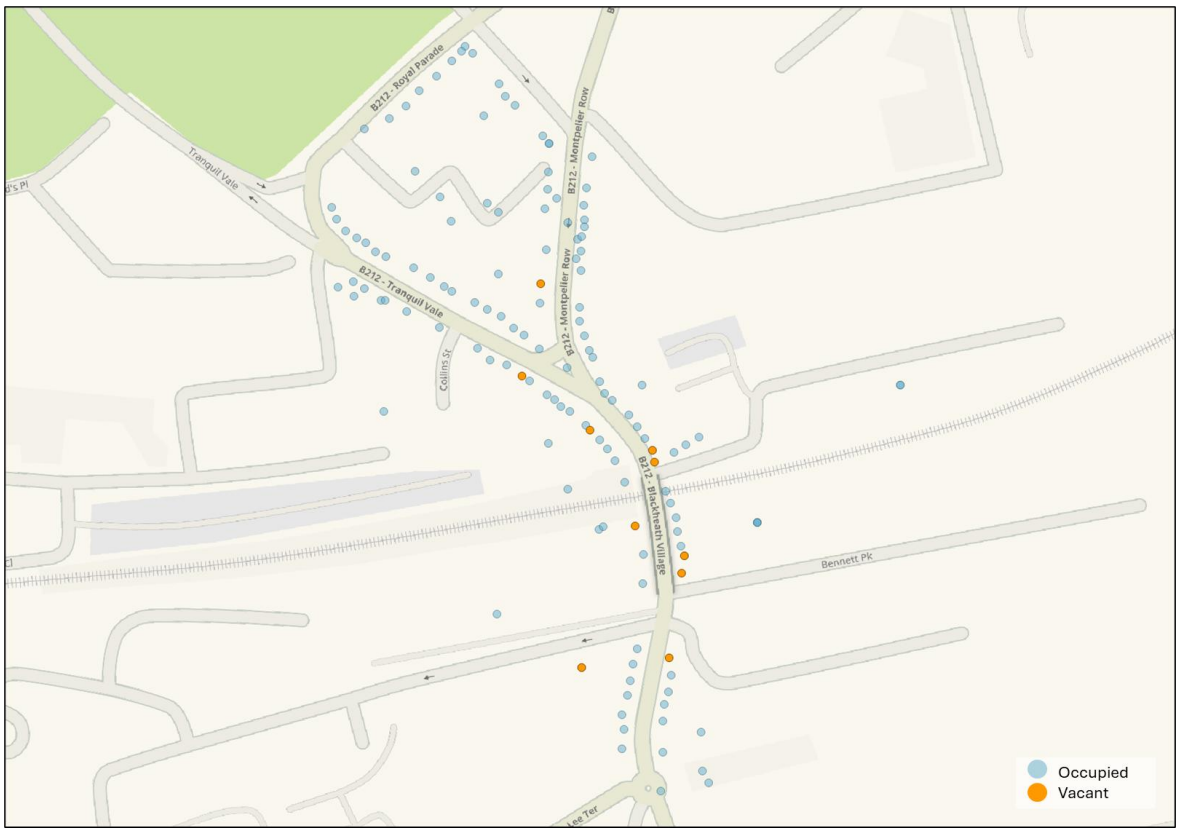
110. Cafes & fast food and restaurants occupy the same number of outlets; however, restaurants take up a larger floorspace. Cafes & fast food has the biggest difference between the London Average (10.1 percentage points lower in outlets and 6.8 percentage points lower for floorspace). Key operators are Age Exchange, Boulangerie Jade, Costa and 15Grams, these show that they are more Cafe based, rather than fast food, QSR based operators.

Vacancies

111. There are a total of 11 vacant outlets in Blackheath which represents 7.9% of the overall outlets, lower than the London average of 8.8%. However, this masks a high rate of vacant floorspace with 12.8% of total floorspace in Blackheath identified as vacant, which is higher than the London Average.

112. The image below illustrates where vacant units are located in Blackheath as of November 2024. As can be seen, vacancies are spread across the centre, with no obvious clusters in a particular area. Of note vacancies fall within the London Borough of Lewisham area.

Figure 34: Vacancies Map, Blackheath



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

113. Blackheath has a high national multiple presence, including fashion retailers like Oliver Bonas, Sweaty Betty and Jojo Maman Bebe, offering a premium selection. Other multiple representations include Space NK Apothecary, Farrow & Ball, Gails and Cote.

Figure 35: Space NK Store



Source: LSH Site Visit

114. There is a good independent representation in Blackheath, covering a variety of offers, including a boutique (Blackbird and On The Heath), gift shop (Blackheath Creatives), bookshop (The Bookshop on the Heath), markets (Shepherd Food, Snack Heath) and cafés (Arts Kitchen and Montpelier's).

Markets

115. Blackheath Farmers Market is located in Blackheath Station car park, a few minutes walk from the high street. It is open every Sunday from 10 am to 2 pm, run by London Farmers, where local fresh vegetables, fruits and meats are sold.

Retailer Requirements

116. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 11: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

117. As of February 2025, a review of published operator requirements identified 20 retail, leisure and service operator requirements, seeking a combined maximum floorspace of up to 13,834 sqm. These retailers include The White Company (clothing and homeware), Soderberg (bakery), Bill's (restaurant) and Travelodge. For a comprehensive list, please refer to Appendix C1.

118. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

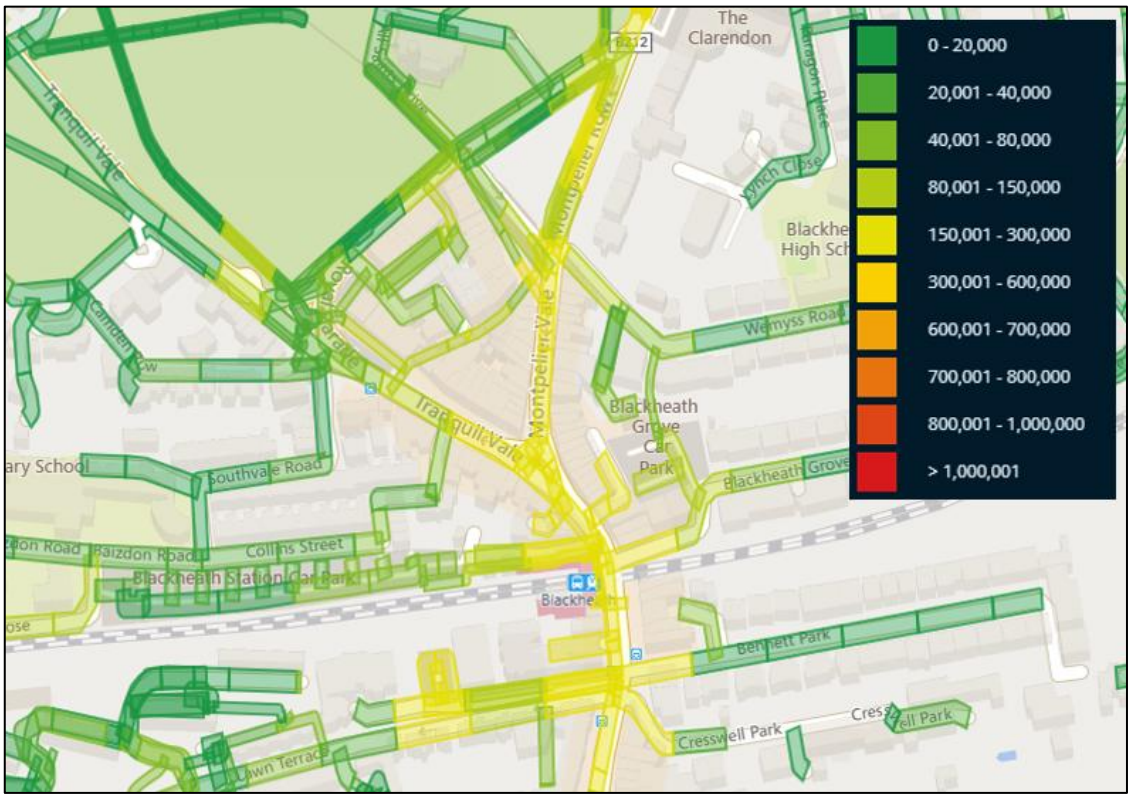
119. It is also possible that these operators are not looking for opportunities in Blackheath specifically, rather they are looking for opportunities in areas similar to and including Blackheath.

120. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Pedestrian Flows

121. The figure below illustrates the pedestrian flows for Blackheath in the form of a heat map showing total pedestrian movements for November 2024.

Figure 36: Blackheath Footfall Heat Map, November 2024

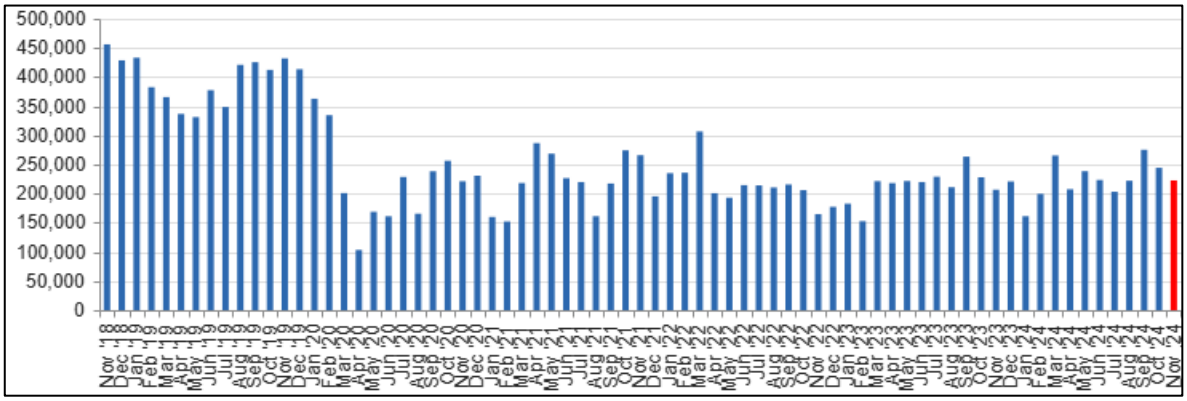


Source: Datscha

122. A section of Blackheath, located along Blackheath Village (by the train station entrance), was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

123. As can be seen in the figure below, footfall levels dropped significantly to a low of around 100,000 in March 2020 (in line with the beginning of the Pandemic period). Although they have bounced back from this point onwards, post-Pandemic monthly figures are significantly lower than what was recorded in late 2018 and throughout 2019. Where counts had previously been regularly ranging between 350,000 and 450,000, they are now infrequently surpassing 250,000.

Figure 37: Monthly Footfall Graph, November 2018 - November 2024, Blackheath Village



Source: Datscha

Accessibility

124. A central point within Blackheath provides a PTAL output of 5, indicating that public transport is good.

125. Blackheath rail station is located at a central point within Blackheath centre, providing transport services by Southeastern and Thameslink. The services allow for connections to London Cannon Street, London Victoria, Gravesend, Dartford and Slade Green.

126. There are eight bus services, one of which is a night service, available in Blackheath. These provide routes to Slade Green, Woolwich, Stratford International, Lewisham, Crystal Palace and Elmers End.

127. The centre is dominated by the B212, running through the town centre, from the north to the south. The B212 is a major thoroughfare connecting Blackheath to neighbouring towns. Segments of the roads are one-way streets to manage traffic and reduce congestion.

128. Street parking is available throughout the centre - bays are located in store fronts. Parking is also available at Blackheath Station and at Blackheath Grove.

129. Pavements in Blackheath are generally wide, and in areas where roads are narrower, metal railings are installed to enhance pedestrian safety from traffic. A mix of traffic lights and zebra crossings are situated throughout the town to help pedestrians cross safely. Traffic flow is to be improved to increase safety and ease of movement for pedestrians.

130. Designated cycle lanes cannot be found within the centre, with busy roads and congested parking, cycling in the area can be quite hazardous. Cycle racks are situated at the train station and around the town centre for safe storage. At the time of the visit, there were a few Lime bike parked near cycle racks.

Environmental Quality

131. The environmental quality of Blackheath is generally strong, with good access to open green space, well-kept buildings, attractive shop frontages and provision of signage to support wayfinding.

Figure 38: Examples of Stronger Environmental Quality



Evening and Night Time Economy

132. The evening economy in Blackheath District Centre is modest, and night time activity is also limited, with very few operating past midnight. This is typical for a district centre.

133. The centre is served with three public houses and one bar, these all close by midnight, expect for The Rail Station (public house) which remains open until 1 am on Friday and Saturdays. There is little variation in the local offer between weekdays and weekends, as closing times remain largely consistent throughout the week.

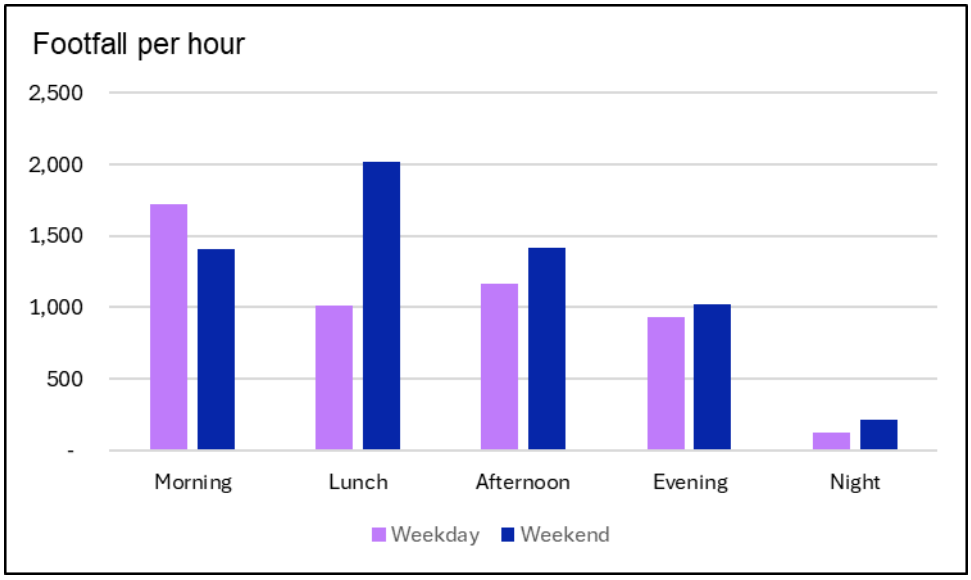
134. The district also benefits from a restaurant presence with venues such as Cote and Zerodegrees Microbrewery Restaurant supporting evening and night offers. Blackheath is also served with a performance venue which holds entertainment, with events such as comedy, music events and theatre shows, diversifying the offer.

135. The figure below shows how footfall levels differ across different parts of the day. This relates to footfall in November 2024, at a central point within the centre, along Tranquil Vale, where there are two pubs located (O'Neills and The Crown).

136. As can be seen, footfall in the evening (5pm – 9pm), is lower than in the morning, lunch and afternoon. During the weekday, this difference in activity is less

prominent, whereas weekend activity shows much larger variation, indicating a more significant shift in footfall. More activity is seen on weekend evenings and nights in comparison to the weekend activity, showing that the centre is slightly more popular during the weekend. This pattern can be seen throughout the day except for mornings.

Figure 39: Footfall by Time of Day, High Street, November 2024



Source: MSCI

Conclusion

137. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Low vacancy rate (outlets)
- Good mix of national multiples and independents operators
- Weekly market as a driver of footfall in the centre
- Strong interest from a range of retailers for presence within the centre
- Good public transport links
- Strong environmental quality
- Access to open green space
- Moderate activity of evening and night time economy, particularly on the weekends.

Weaknesses

- Vacant floorspace rate is above the London average
- Footfall is down when comparing pre-Pandemic to post-Pandemic
- Challenging environment for cyclists in parts
- Low evening and nighttime economy.

Opportunities

- Capitalise on the retailers who are interested in gaining representation within the centre
- Diversify the uses in the centre to support bringing vacant units back into use (e.g., education and health care uses).

Threats

- High/ increasing business operating costs.

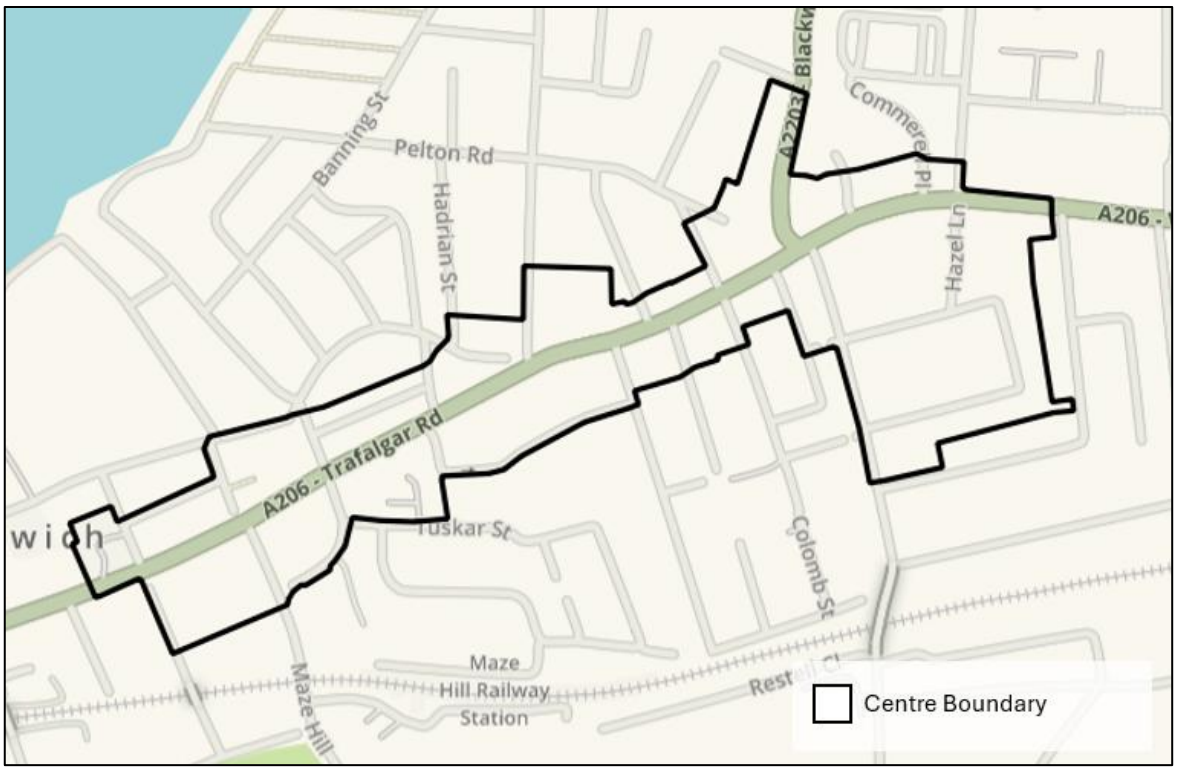
5. East Greenwich District Centre Health Check

Overview

138. East Greenwich is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary stretches from east to west along Trafalgar Road, extending south to encompass The Greenwich Centre and Library.

139. East Greenwich is located to the north-west of the Borough. It is separated from Greenwich District Centre by a small section of the A206. North Greenwich District Centre is approximately 1.5km north of East Greenwich. Woolwich Major Town Centre is circa 4km east, whilst Eltham Major Town Centre is circa 4.9km south-east.

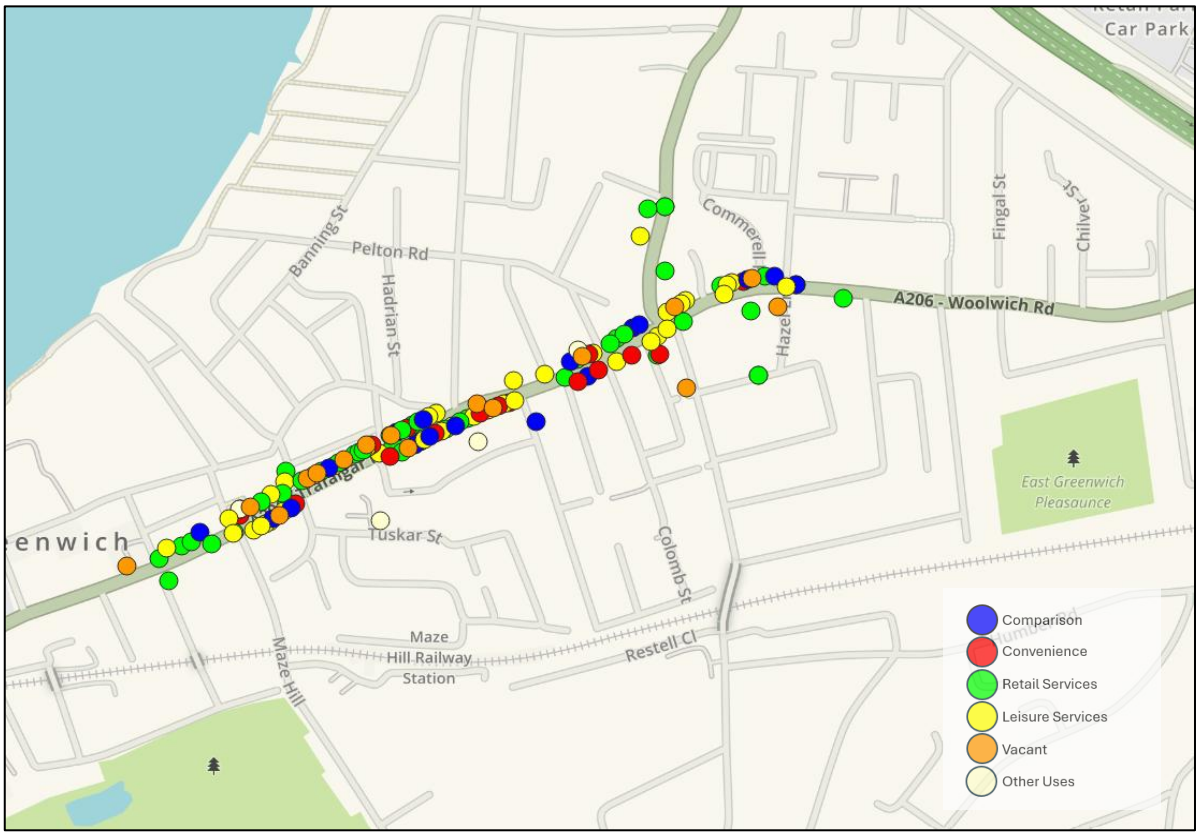
Figure 40: East Greenwich District Centre Boundary Map



Diversity of Uses

140. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess East Greenwich's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 41: Diversity of Uses Map, East Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

141. The table below shows that East Greenwich has a total of 134 units and an overall quantum of 14,680 sqm in floorspace.

Table 12: No. units in East Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		East Greenwich	London Average		East Greenwich	London Average
Comparison	19	14.2%	23.0%	1,900	12.9%	23.7%
Convenience	16	11.9%	12.1%	2,910	19.8%	21.8%
Leisure	39	29.1%	26.4%	4,080	27.8%	25.5%
Service	39	29.1%	24.1%	3,430	23.4%	16.6%
Miscellaneous	5	3.7%	6.4%	390	2.7%	3.7%
Vacant	16	11.9%	8.8%	1,970	13.4%	9.6%
Total	134	100.0%	100.0%	14,680	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

142. In terms of number of outlets, leisure and service have the highest proportion of outlets and floorspace. They both occupy the same number of outlets, at 29.1%,

which is higher than both London averages. Service operators include Snap Fitness, Freeman Optician and Collins Dry Cleaners.

143. Comparison retail outlets and floorspace occupy less than the London averages (14.2% vs 23%). For floorspace, it is at 12.9%, almost half of the London average of 23.7%. Key outlets include Boots, Fixit and The Mews Bookshop.

Table 13: No. of Food & Beverage Units in East Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		East Greenwich	London Average		East Greenwich	London Average
Bars, Pubs & Clubs	2	1.5%	2.9%	900	6.1%	6.8%
Cafes & Fast Food	22	16.4%	13.1%	1,700	11.6%	7.9%
Restaurants	12	9.0%	7.9%	1,130	7.7%	6.7%
Total	36	26.9%	24.0%	3,730	25.4%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

144. The proportion of outlets for bars, pubs & clubs is below the London average, with only two outlets. Cafes & fast-food and restaurants broadly align with London averages.

145. Cafes & fast-food occupies almost two thirds of total food & beverage outlets in East Greenwich. These include Costa, KFC, Ding Tea, Pizza King and Rostaleah.

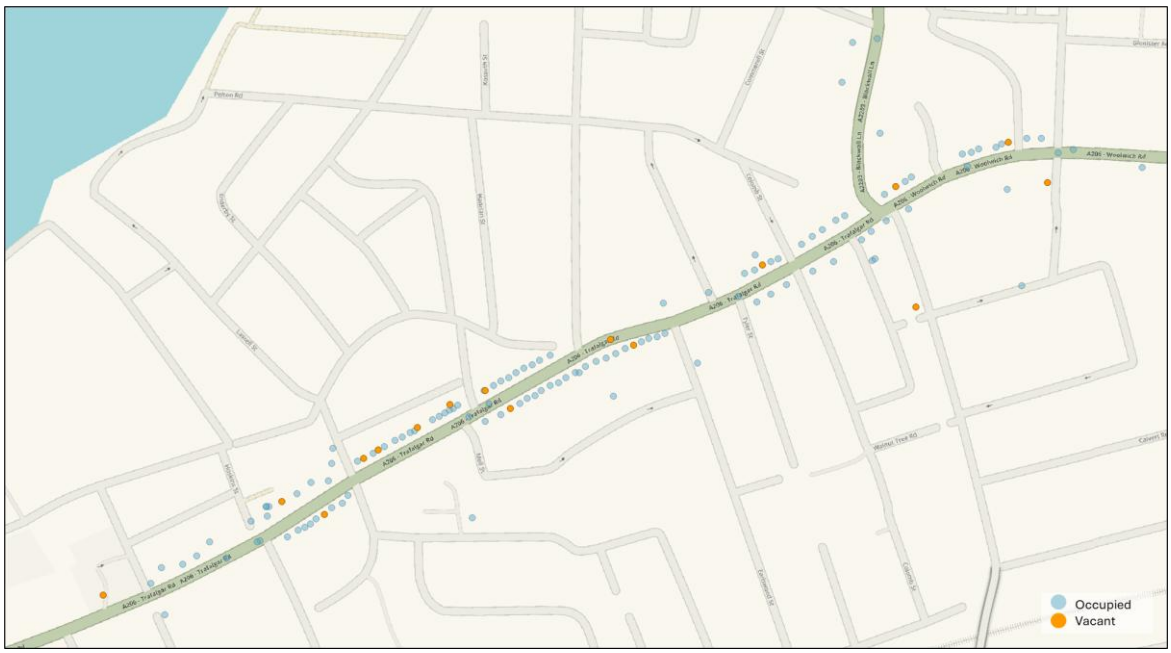
146. There is a good presence of restaurants, both in terms of number of outlets and floorspace when comparing to the London averages.

Vacancies

147. There are a total of 16 vacant outlets in East Greenwich which represents 11.9% of the overall outlets, higher than the UK average of 8.8%. 13.4% of the floorspace in East Greenwich is vacant.

148. The image below illustrates where vacant units are located in East Greenwich as of November 2024. As can be seen vacancies are distributed along Trafalgar Road.

Figure 42: Vacancies Map, East Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

149. There are limited national multiples at East Greenwich. Those present include convenience stores (Tesco Express, Co-op and Iceland), quick-service restaurants (KFC, Pepe's Piri Piri and Domino's pizza), cafe (Costa) and gym (Snap Fitness).

Figure 43: Tesco Express Store



Source: LSH Site Visit

150. East Greenwich has a strong range of independent outlets, these are oriented towards non-fashion retail and goods and services such as Nail Land London, Alex Charity shop and Greenwich Hair Salon. There are also several food & beverage outlets, such as Trafalgar Cafe London and Pathiri.

Pedestrian Flows

151. The figure below illustrates the pedestrian flows for East Greenwich in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall activity is relatively evenly spread across along Trafalgar Road, with no particular hot spots.

Figure 44: East Greenwich Footfall Heat Map, November 2024

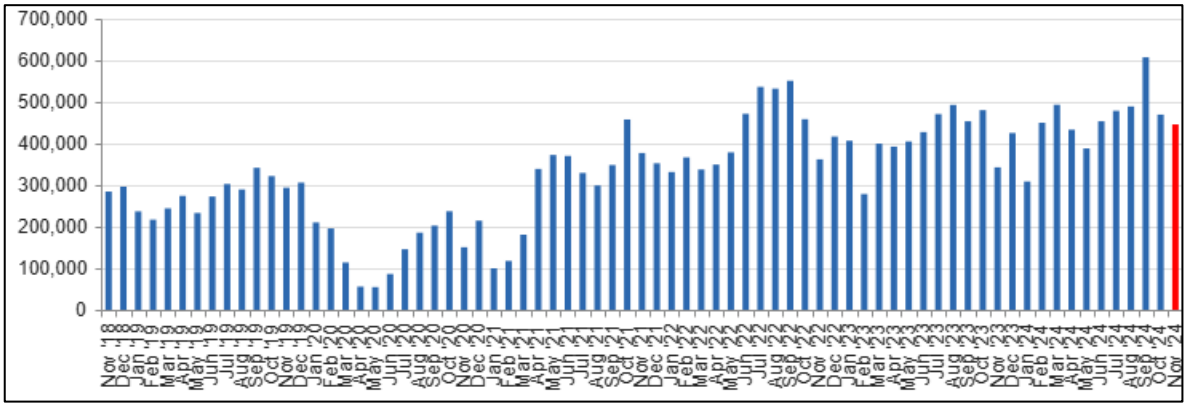


Source: Datscha

152. A section of East Greenwich, by the Trafalgar Road/ Blackwall Lane/ Woolwich Road junction, was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

153. As can be seen in the figure below, footfall levels suffered dips during the Pandemic period but have bounced back particularly well. Where monthly figures in late 2018 and throughout 2019 were consistently between 200,000 and 350,000, figures from June 2022 onwards are regularly surpassing 400,000, with a peak of over 600,000 in September 2024.

Figure 45: Monthly Footfall Graph, November 2018 - November 2024, Trafalgar Road/ Blackwall Lane/ Woolwich Road junction



Source: Datscha

Accessibility

154. Central points within East Greenwich provides a PTAL output of 4 and 5, indicating that public transport accessibility in the area is good.

155. There are no tube stations serving East Greenwich. Cutty Sark and Greenwich station are a 20-minute walk, these stations have regular DLR trains running north towards Bank and south towards Lewisham.

156. Maze Hill Rail station is a 10-minute walk from a central point of the East Greenwich centre. This is served by Thameslink and Southeastern rail, allowing regular travel to Woolwich, London Cannon Street, Luton, Rainham, Slade Green, Bedford and .

157. There are strategically placed bus stops along the A206, allowing easy access to the centre. Regular bus services provide stops east towards North Greenwich (Jubilee Line available), Woolwich, Sidcup, Queen Mary Hospital and Thamesmead and west towards Tottenham Court, Lewisham, Peckham and Greenwich.

158. There is a bus lane for the majority of the high street on Trafalgar Road, going west towards the Blackwell Tunnel Southern approach. When there isn't a bus lane on Trafalgar Road, there is a 2-way segregated cycle lane on the northern side of the road, allowing cyclists to cycle safely. There are a few cycle racks, strategically located regularly down Trafalgar Road - outside Snap Fitness, Maze Hill Road junction, Christ Church and Coral betting.

159. There are Lime bikes that are plotted along the streets. Greenwich East is the furthest east Lime bikes can go.

160. Whilst there are numerous traffic light and Zebra crossings across the centre, the level of traffic with the volume of footfall can be dangerous for those navigating by foot.

161. There is one car park in East Greenwich centre, this is Greenwich Park Street which provides 33 bays. Parking needs are also met by controlled parking zones on streets off Trafalgar Road. Streets include Greenwich Park Street, Hoskins Street,

Earlswood Street and Whitworth Street. These are pay at machine or via parking app to maximum stay of 2 hours.

Environmental Quality

162. The environmental quality of East Greenwich is fair, with examples of well-kept, charming shop frontages, ample provision of street furniture (bins, seating and cycle racks) as well as a good blend of architectural styles and buildings of historic and religious significance.

Figure 46: Examples of Stronger Environmental Quality



Source: LSH Site Visit

163. There are however examples of bin bags on pavements, vacant units and unkept buildings that detract from the environmental quality of the centre, as does the busy main road cutting through the heart of the centre.

Figure 47: Examples of Weaker Environmental Quality



Source: LSH Site Visit

Conclusion

164. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Strong presence of independent representation
- Increase in footfall over the past few years
- Strong leisure and service offer
- Provision of cycle lanes and cycle storage
- The Forum is a key community destination.

Weaknesses

- Vacancy rate above London averages (outlets and floorspace)
- Weak environmental quality in some areas
- Traffic throughout the centre creates challenges for pedestrians navigating the centre
- Evening and night time economy are limited (two pubs)
- Performance is behind compared to other district centres in borough.

Opportunities

- Diversify the uses in the centre to support bringing vacant units back into use (e.g., education and residential uses)
- Improvements to environmental quality where appropriate – shop frontages, building quality and litter.

Threats

- High/ increasing business operating costs
- Competition from nearby retail centres (Greenwich) that offer a larger mix of retail and leisure provision.

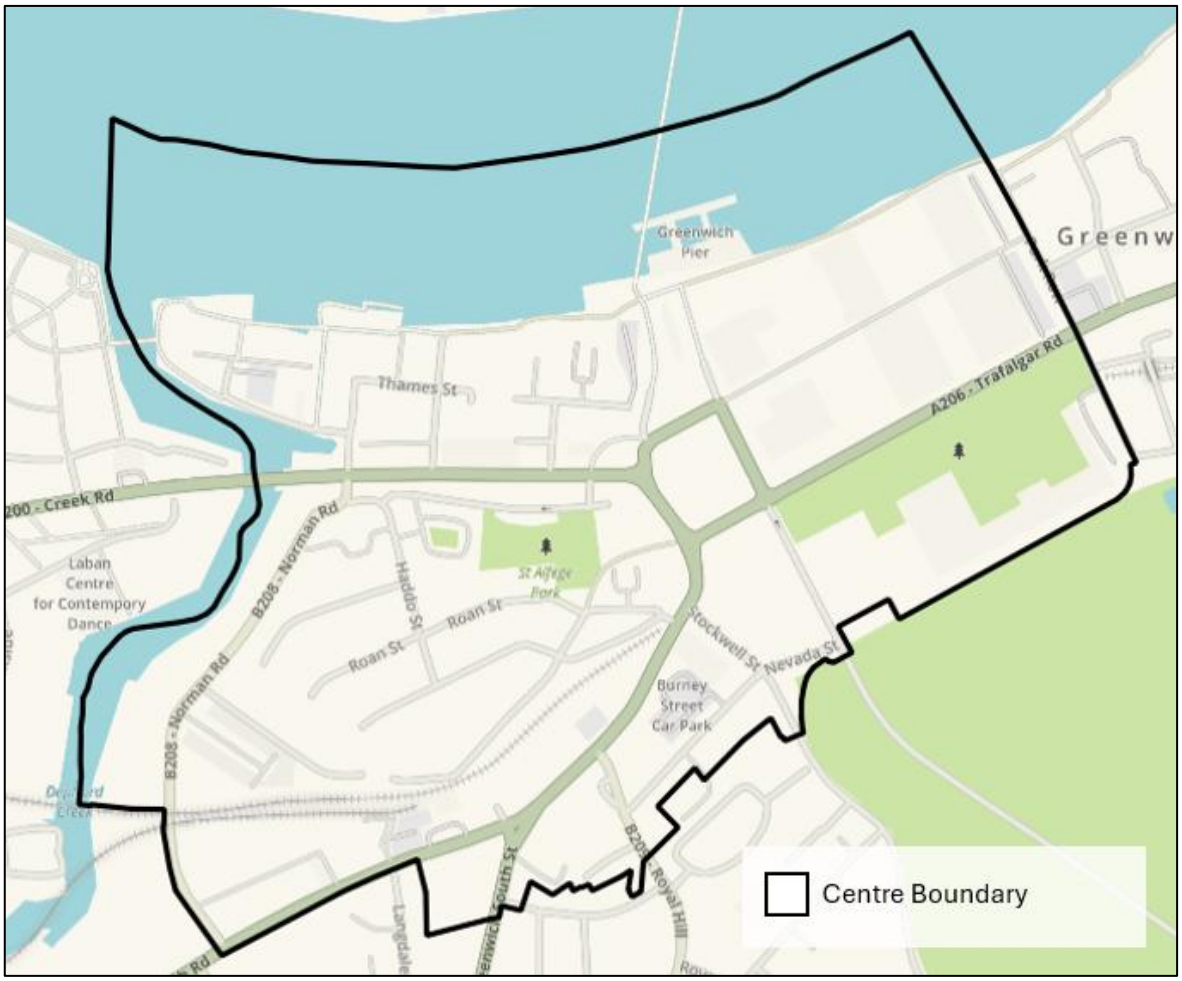
6. Greenwich (West Greenwich) District Centre Health Check

Overview

165. Greenwich, also referred to as West Greenwich, is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary runs through Deptford Creek to the west, along the River Thames to the north, down Park Row to the east with a jagged southern border that encompasses the Travelodge and Novotel hotels, Borough Hall Greenwich, Burney Street Car Park, Greenwich Theatre and The National Maritime Museum.

166. Greenwich is located at the north-western edge of the Borough, by the River Thames. East Greenwich District Centre is separated from Greenwich District Centre by a small section of the A206, whilst North Greenwich District Centre is located approximately 2.3km north-east (15-minute drive). Woolwich Major Town Centre is approximately 5.2km east, whilst Eltham Major Town Centre is approximately 5.4km south-east.

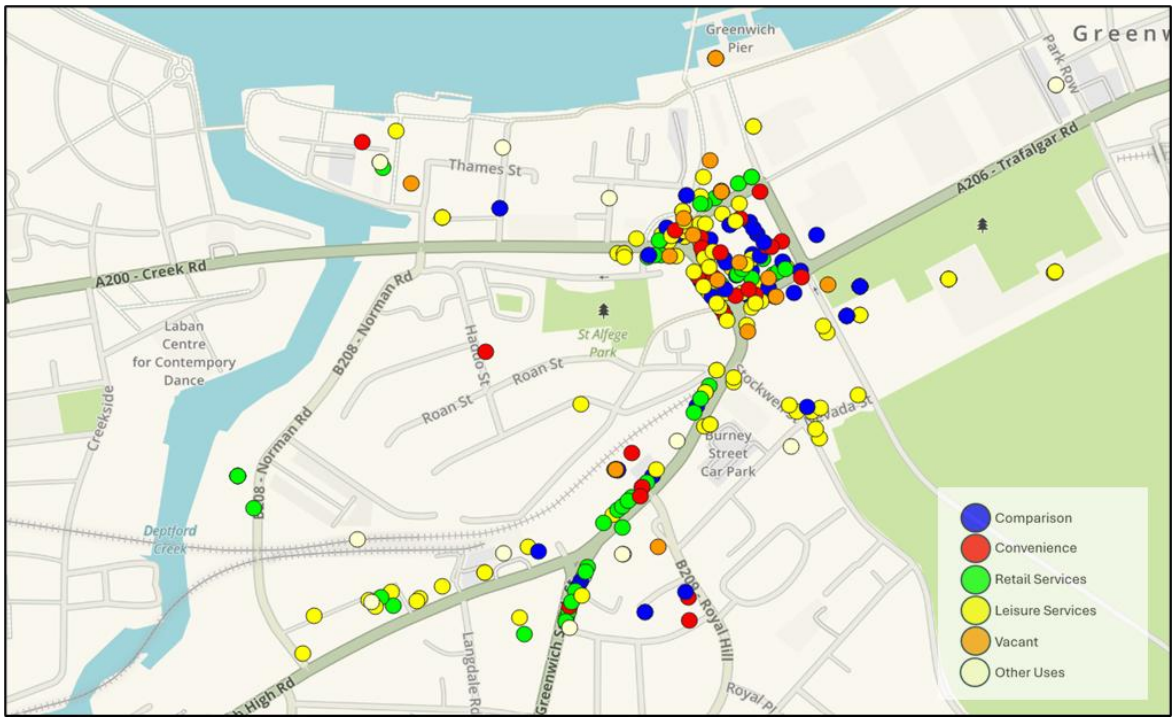
Figure 48: Greenwich District Centre Boundary Map



Diversity of Uses

167. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Greenwich's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 49: Diversity of Uses Map, Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

168. The table below shows that Greenwich has a total of 245 units and an overall quantum of 48,620 sqm in floorspace.

Table 14: No. units in Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Greenwich	London Average		Greenwich	London Average
Comparison	46	18.8%	23.0%	5,110	10.5%	23.7%
Convenience	29	11.8%	12.1%	8,880	18.3%	21.8%
Leisure	87	35.5%	26.4%	22,200	45.7%	25.5%
Service	49	20.0%	24.1%	8,140	16.7%	16.6%
Miscellaneous	19	7.8%	6.4%	1,470	3.0%	3.7%
Vacant	15	6.1%	8.8%	2,820	5.8%	9.6%
Total	245	100.0%	100.0%	48,620	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

169. Leisure is by far the most common use type for Greenwich in terms of number of outlets and floorspace, these are above the London average. Leisure floorspace almost amounts for half of the space taken at 45.7%. The majority of these are food & beverage tenants, this includes operators such as Davy's, Crafted Social and Nando's.

170. Comparison retail outlets account for a lower proportion of total outlets at 18.8%, and considerably lower proportion of floorspace at 10.5% then they tend to across London. These include operators such as Waterstones, The Greenwich Collective and Pickwick Papers & Fabrics.

171. Although convenience retail represents 11.8% of total outlets, 7 percentage points less than comparison, convenience takes up 7.8 percentage points more of total floorspace than comparison. The largest tenants are Waitrose & Partners, Aldi and M&S Food.

Table 15: No. of Food & Beverage units in Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Greenwich	London Average		Greenwich	London Average
Bars, Pubs & Clubs	17	6.9%	2.9%	7,270	15.0%	6.8%
Cafes & Fast Food	26	10.6%	13.1%	2,400	4.9%	7.9%
Restaurants	29	11.8%	7.9%	5,310	10.9%	6.7%
Total	72	29.4%	24.0%	14,980	30.8%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

172. The number of outlets and floorspace of bars, pubs and clubs in Greenwich is higher than the London average, showing a stronger bar, pub and club presence.

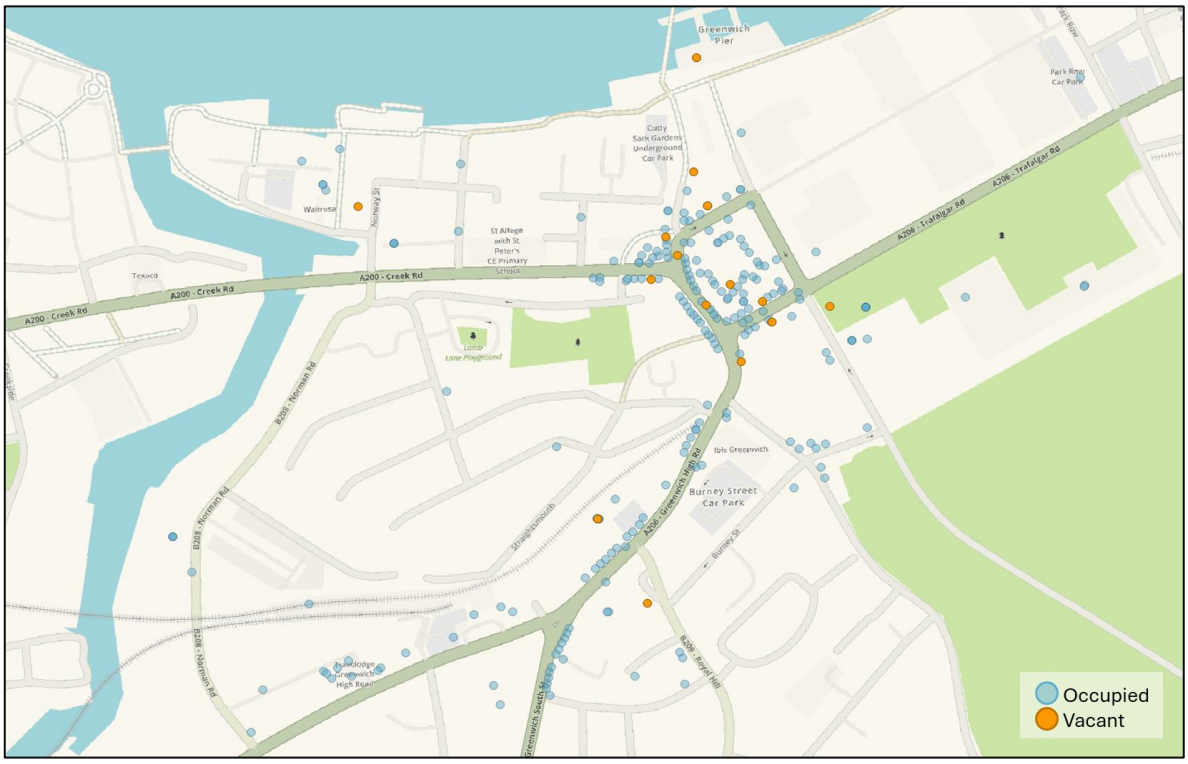
173. Cafes and fast-food units fall below the London average, particularly for floorspace, where it only takes 4.9% compared to the 7.9% average. They have a higher number of units than bars, pubs & clubs but occupy the lowest amount of floorspace at 4.9%.

Vacancies

174. There are a total of 15 vacant outlets in Greenwich which represents 6.1% of the overall outlets, lower than the UK average of 8.8%. 5.8% of the floorspace (2,820 sqm) is vacant.

175. The image below illustrates where vacant units are located in Greenwich as of November 2024. As can be seen, there are several vacancies around the streets near Greenwich Market, where the majority of retail outlets are concentrated. There are a few additional vacancies dotted around the centre, with 2 vacancies along Greenwich High Street.

Figure 50: Vacancies Map, Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

176. Greenwich has a few national multiples, including Oliver Bonas, Waterstones and Clarendon Fine Art. Local formats of convenience stores are found throughout the centre like M&S food, Tesco Express and Sainsbury's local. Premium coffee brands like Gails, Grind and Ole & Steen are found at Greenwich.

177. There is a strong presence of independent retailers within Greenwich which helps to create a unique and community feel to the centre. Comparison retailers include fashion, jewellery and gifts by retailers like ArcAngel, Break Out, Humanity Centred Designs, and Sugar & Style.

178. There is a collection of independent artisan-style cafes and bakeries, such as The Green Café, further established by the local traders at Greenwich Market.

Markets

179. Greenwich Market established in the 1700s, is a daily covered market from 10 am to 5:30pm, with a range of stalls and stores, located in the centre of the town. Operators are individual brands which are rotated regularly, selling a mix of arts, craft, antiques, fashion and gourmet food. It is a popular local and tourist spot that draws footfall into the centre.

Figure 51: Greenwich Market



Source: LSH Site Visit

180. Cutty Sark Street food market is an open-air market every Friday to Sunday from 10am till 6pm, located on the riverside, next to the Cutty Sark gardens. Offering a rotation of stalls of food and drinks from around the world.

Retailer Requirements

181. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 16: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

182. As of February 2025, a review of published operator requirements identified 21 retail, leisure and service operator requirements, seeking a combined maximum floorspace of up to 6,295 sqm. These retailers include Savers (health and beauty

products), Bird & Blend Tea Co. (tea sales), Megan's (restaurant) and Everyman Cinema. For a comprehensive list, please refer to Appendix C1.

183. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

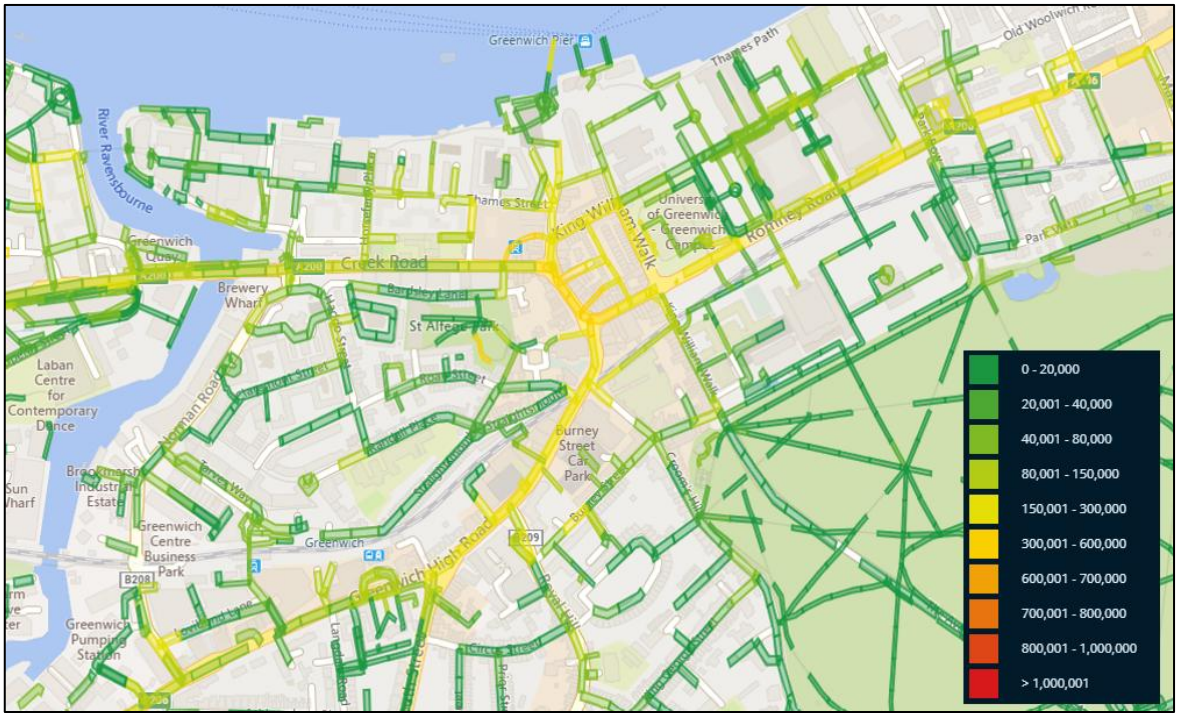
184. It is also possible that these operators are not looking for opportunities in Greenwich specifically, rather they are looking for opportunities in areas similar to and including Greenwich.

185. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Pedestrian Flows

186. The figure below illustrates the pedestrian flows for Greenwich in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall levels are highest at the heart of the centre – along Greenwich Church Street, Nelson Road, King William Walk as well as at Greenwich Market.

Figure 52: Greenwich Footfall Heat Map, November 2024



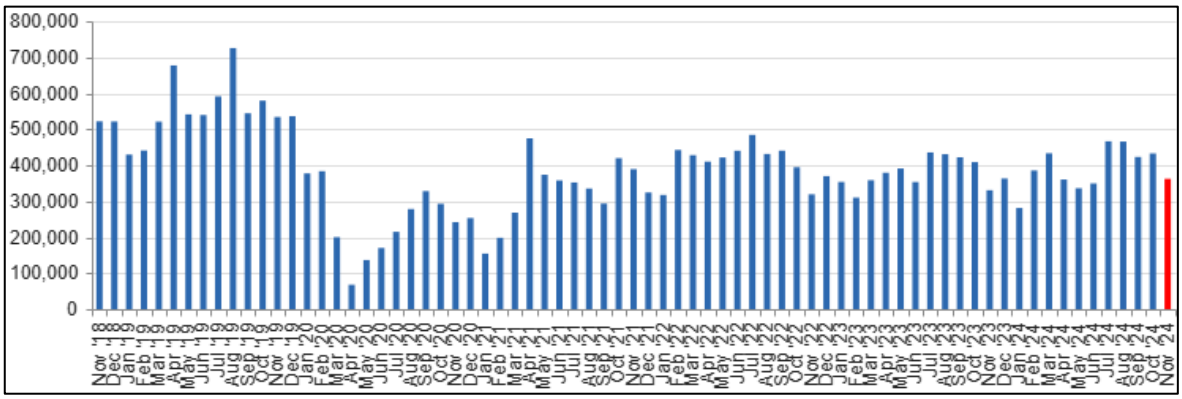
Source: Datscha

187. A section of Greenwich Church Street, by the market entrance, was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

188. As can be seen in the figure below, although footfall numbers have recovered from the lows of the Pandemic period, they have not quite fully returned to what was

recorded in late 2018 and throughout 2019. Where monthly numbers were previously regularly surpassing 500,000, they are now down at around 400,000.

Figure 53: Monthly Footfall Graph, November 2018 – November 2024, Greenwich Church Street



Source: Datscha

Accessibility

189. A central point within Greenwich provides a PTAL output of 6a, indicating that public transport accessibility within the area is excellent.

190. Cutty Sark station, located in the centre of the town, and Greenwich Station South of the centre, have regular DLR trains running north to Bank and south to Lewisham. Greenwich station is also served by Thameslink and Southeastern rail with trains to Woolwich, London Cannon Street, Luton and Kent.

191. Bus services can be picked up throughout the centre, and along roads A200 and A206 providing connections to places across Central London, North Greenwich, Thamesmead, Orpington, Sidcup, Peckham, Blackheath, Woolwich, and Lewisham.

192. At Greenwich pier, Uber boat and Thames Clippers lines, RB1, RB2 and RB6 can be taken to locations like Embankment, Battersea and Putney.

193. There is a lack of cycling zones on roads and at traffic light signals within the centre. There are a few cycle racks scattered around the centre to store bikes, occasionally bikes are chained onto metal railings outside Cutty Sark.

194. There are high number of lime bikes around Greenwich, with a concentration of them around Cutty Sark and Greenwich station.

195. At the centre square connecting A200 and A206 and college approach, due to the traffic and nature of the road splitting, it can be challenging for pedestrians to navigate, there are crossings to help navigate this.

196. There are 5 car parks within Greenwich town centre, Cutty Sark Gardens, Burney Street, 259 Greenwich High Road, Greenwich Maritime, Park Row.

Environmental Quality

197. The environmental quality of Greenwich is generally strong, with access to nearby green space, characterful and well-kept shop frontages, historic buildings with architectural significance and ample provision of street furniture.

Figure 54: Examples of Stronger Environmental Quality



Source: LSH Site Visit

Evening and Night Time Economy

198. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Greenwich have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

Figure 55: Greenwich Picturehouse



Source: LSH Site Visit

199. Greenwich has a diverse range of nighttime provision as outlined below. Greenwich is more leisure and experience activities based rather than traditional late-night clubbing, featuring venues such as a jazz club, comedy club and an escape room.

200. As can be seen, there is a particularly strong provision of historical sites (Cutty Sark, National Maritime Museum, Old Royal Naval College and Greenwich Market). These venues primarily operate during daytime hours; however, many host dedicated evening events that extend their use into the evening and night, contributing to the centre's economy. These range from live music and exclusive film screenings to immersive projection shows and educational programmes, offering visitors a unique way to engage with cultural and historical significance in the centre.

201. A range of pubs are open until late into the night and a variety of restaurants available across different cuisine.

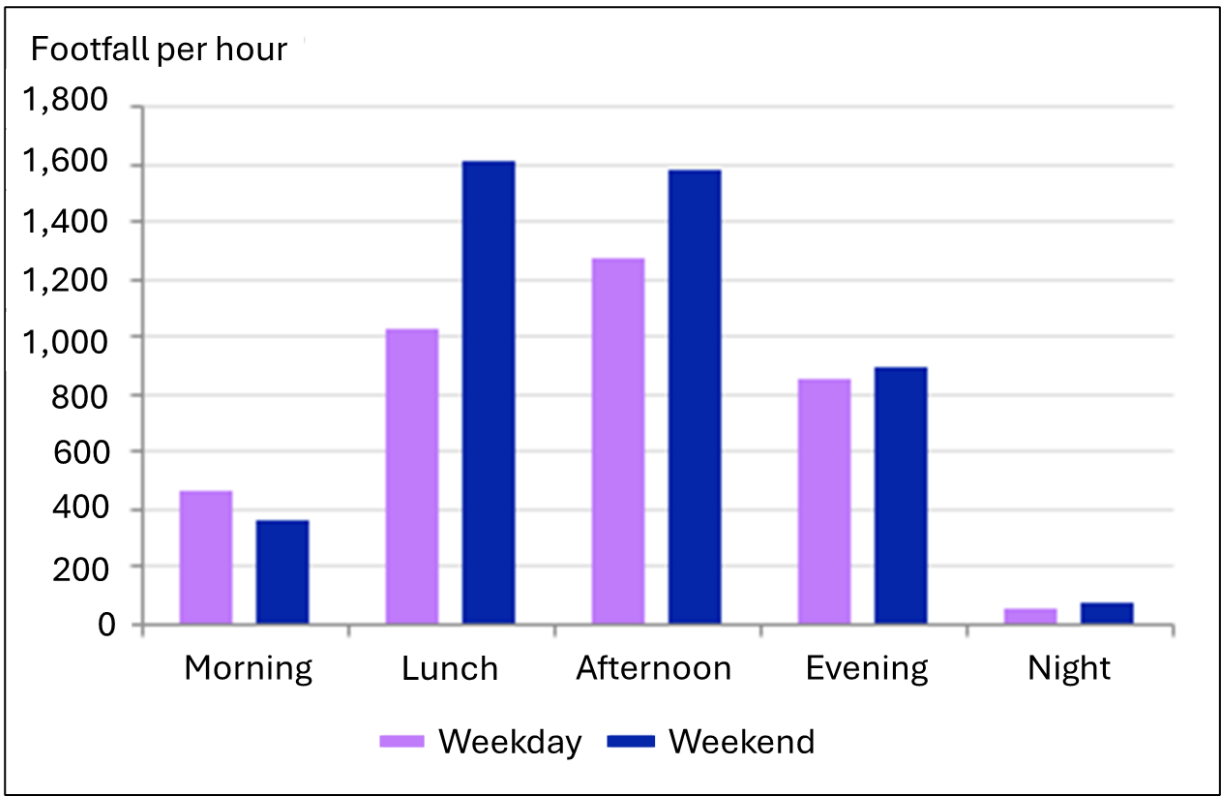
Table 17: Leisure Operator Sample

Retailer Name	Type	Open	Close
Picturehouse Greenwich	Cinema	All Day Screenings	
Oliver's Jazz & Piano Bar	Jazz Club	2pm	12-2am
Houdini's	Escape room	10am	10pm
Greenwich Theatre	Theatre	1pm	Evening shows
Old Royal Naval College	Heritage Site	10am	5pm
National Maritime Museum	Museum	10am	5pm
Cutty Sark	Ship	10am	5pm
The Queen's House Art Gallery	Art Gallery	10am	5pm
Up The Creek	Comedy Club	6:30-7pm	10-2am
Spanish Galleon	Pub	10-10:30am	11-2am
Trafalgar Tavern	Pub	11pm	11-12am
Sticks and Sushi	Restaurant	12pm	10-11pm

Source: LSH Research

202. The figure below shows how footfall levels differ across different parts of the day. This relates to footfall in November 2024 at a central point within the centre, along Greenwich Church Street. As can be seen, footfall in an evening (5pm – 9pm) remains relatively strong. Whilst there is a drop-off from the figures seen at lunch and in the afternoon, hourly numbers are still high, and significantly above what is recorded in the morning. Weekday and weekend evening footfall is similar.

Figure 56: Footfall by Time of Day, Greenwich Church Street, November 2024



Source: MSCI

Conclusion

203. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Strong public transport links
- Low vacancy rate
- Market as key attraction destination and footfall driver
- Good blend of national multiples and independent operators
- Strong food and beverage outlets – 29.4% compared to London average of 24.0%
- Strong leisure outlets – 35.5% compared to London average of 26.4%.
- Good environment quality – good access to green space, historical buildings and street furniture
- Strong mix of cafes, pubs and other leisure appealing to locals and tourists
- Good evening offer (cinema, theatre, comedy clubs and more), which is leading to strong footfall activity.

Weaknesses

- Footfall has not reached pre-Pandemic levels
- Lack of comparison retail (particularly floorspace coverage).

Opportunities

- Increase comparison retail provision to increase dwell times within the centre
- Cutty Sark shopping centre environmental quality could be increased
- Capitalise on retailers who are interested in gaining representation within the centre.

Threats

- High/ increasing business operating costs
- Further loss of physical presence of national multiples following difficulties for the likes of WHSmith, Wilko and Body Shop.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.

7. Lee Green District Centre Health Check

Overview

204. Lee Green is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary area wraps around Sainsbury's and Leegate Shopping Centre (including the associated multi-storey car park) to the south of Lee High Road/ Eltham Road and leads north up to Meadowcourt Road.

205. Lee Green is situated on the western edge of Royal Borough of Greenwich, with a significant portion of retail outlets located outside the borough boundary, including Leegate Shopping Centre and Sainsbury's, falling into London Borough of Lewisham.

206. For the purposes of this health check, the district centre in its entirety will be assessed. Eltham Major Town Centre is located approximately 2.9km east of the centre, accessible via the A20 and A210.

207. A neighbourhood plan for Lee (plan period of 2021 - 2031) was adopted in April 2024 and acknowledges the opportunity that the proposed redevelopment of Leegate Shopping Centre presents in relation to the mix of uses, the quality of the public realm and the connectivity within Lee Green District Centre.

208. The Leegate Shopping Centre is primed for redevelopment, with plans to deliver 562 homes, a public square, a supermarket, a medical centre, and other community facilities. Plans were approved by LB Lewisham in July 2023 and the site has been readied for demolition, with all units now vacant. While the development falls within LB Lewisham's boundary the regeneration of the site will economic benefits to the wider centre through linked shopping trips.

Figure 57: Lee Green District Centre Boundary Map

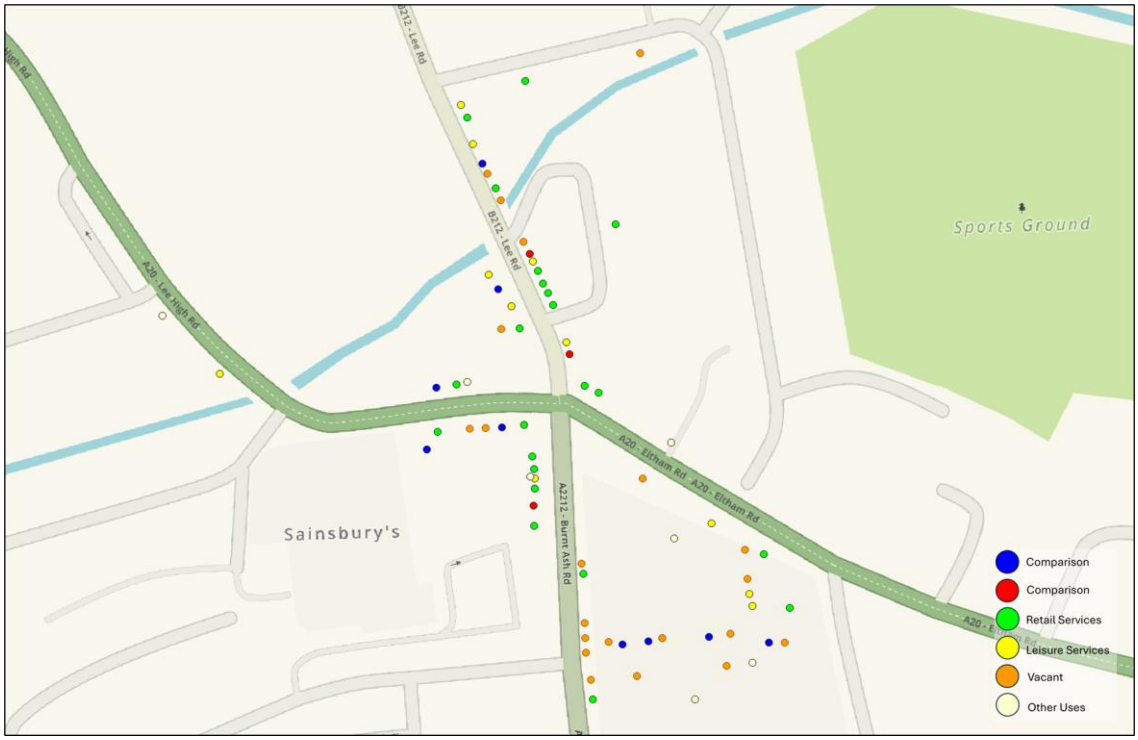


The adopted Lee Neighbourhood Plan promotes the regeneration of the centre through a number of objectives including improving streetscapes and cycling/walking routes, especially along identified "Street Improvement Zones" such as parts of Lee High Road. The plan also aims to encourage the creation of new jobs, affordable homes, and community hubs, while supporting high-quality, well-designed local developments.

Diversity of Uses

209. Data from Green Street, via the GLA High Streets Data Service from November 2024, has been used to assess Lee Green's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 58: Diversity of Uses Map, Lee Green



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

210. The table below shows that Lee Green has a total of 77 units and an overall quantum of 15,810 sqm in floorspace.

Table 18: No. of Units in Lee Green

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lee Green	London Average		Lee Green	London Average
Comparison	10	13.0%	23.0%	1,610	10.2%	23.7%
Convenience	4	5.2%	12.1%	4,760	30.1%	21.8%
Leisure	11	14.3%	26.4%	1,830	11.6%	25.5%
Service	23	29.9%	24.1%	2,250	14.2%	16.6%
Miscellaneous	7	9.1%	6.4%	500	3.2%	3.7%
Vacant	22	28.6%	8.8%	4,860	30.7%	9.6%
Total	77	100.0%	100.0%	15,810	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

211. In terms of outlets, convenience occupies a significantly smaller percentage of outlets than the London average, however it has a larger floorspace take up than the average. This is influenced by Sainsbury's that is located within the centre, occupying 4,420 sqm of floorspace.

212. Comparison and leisure both in terms of outlets and floorspace are lower than the average. Within leisure units, there is one entertainment-based operator which is Museum of Neoliberalism.

Table 19: No. of Food & Beverage Units in Lee Green

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lee Green	London Average		Lee Green	London Average
Bars, Pubs & Clubs	1	1.3%	2.9%	450	2.8%	6.8%
Cafes & Fast Food	6	7.8%	13.1%	450	2.8%	7.9%
Restaurants	2	2.6%	7.9%	220	1.4%	6.7%
Total	9	11.7%	24.0%	1,120	7.1%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

213. Food & beverage operators in Lee Green occupy only 11.7% of outlets (compared to London average of 24%) and 7.1% of floorspace (compared to London average of 21.5%).

214. Café & fast food is the largest category with six units occupying 7.8% but only taking 2.8% of the floorspace. This is aligned with the bar, pubs and clubs with one location (Duke of Edinburgh) that also occupies the same total of floorspace.

Vacancies

215. There are a total of 22 vacant outlets in Lee Green which represents 28.6% of the overall outlets, significantly higher than the London average of 8.8%. 30.7% of the floorspace in Lee Green is vacant.

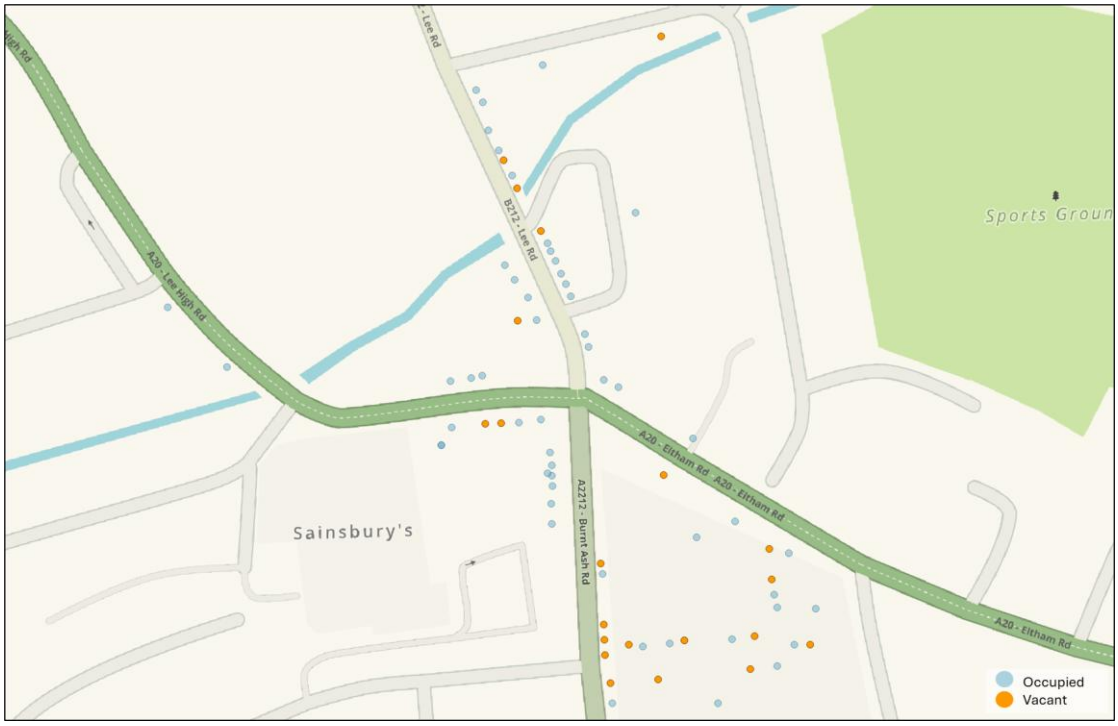
Figure 59: Vacant Units at Leegate Shopping Centre



Source: LSH Site Visit

216. The image below illustrates where vacant units are located in Lee Green as of November 2024. As can be seen the vacancies are spread across the retail centre, with a higher number of vacancies in the south than the north. Vacancies are concentrated along Burnt Ash Road and at the former Leegate shopping centre. At the time of the site visit, Leegate shopping centre was completely vacant, this is due to redevelopment plans. Whilst this is significantly impacting vacancy levels now, residential-led and mixed-use developments will change these figures.

Figure 60: Vacancies Map, Lee Green



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

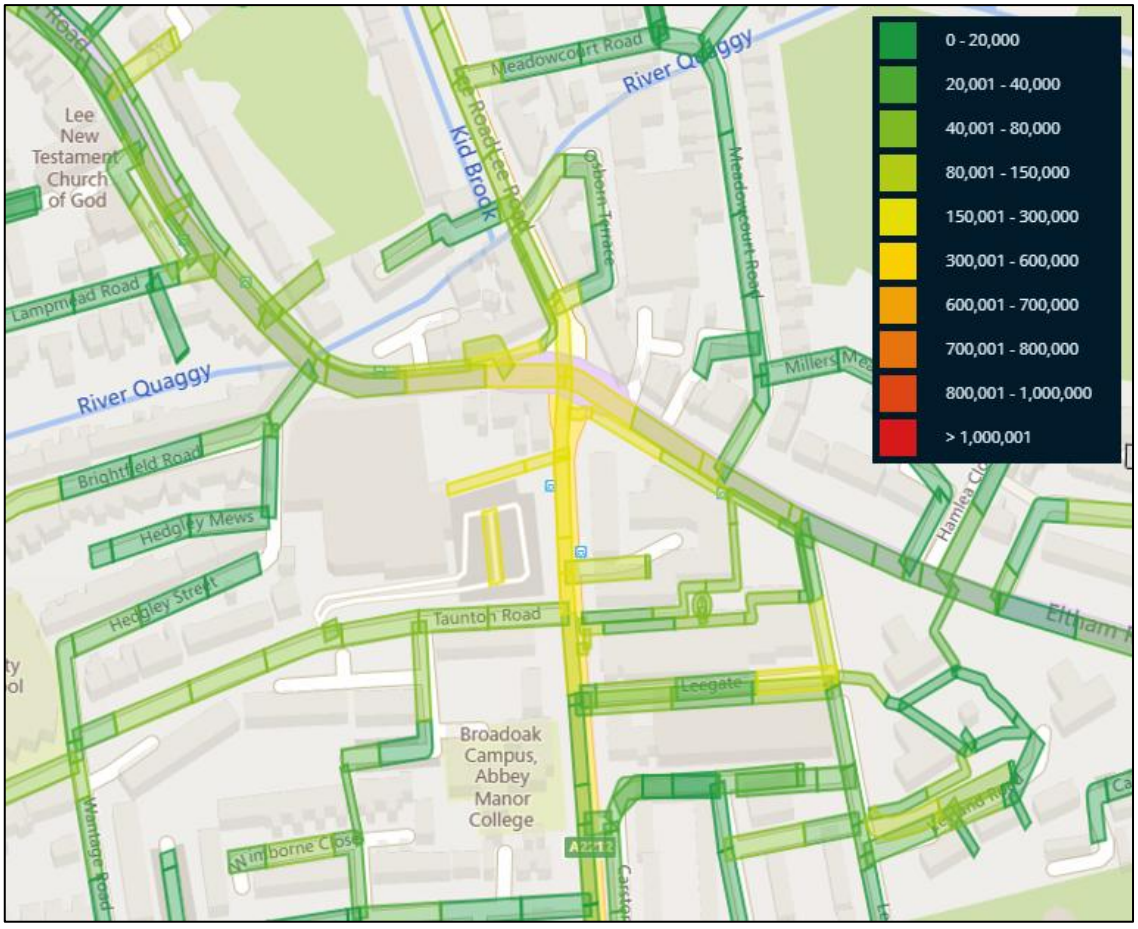
217. There is a low representation of multiple retailers within Lee Green centre. Sainsbury is located on Burnt Ash Road, providing for the immediate catchment.

218. Lee Green has a range of independent outlets, including Blackheath Flooring & Interior, Village Wines, OneTwoFive, At Home SE3. F&B outlets include Carola, Blueberry's and The Vintage Fish.

Pedestrian Flows

219. The figure below illustrates the pedestrian flows for Lee Green in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall levels are highest around the central junction, as well as along Burnt Ash Road.

Figure 61: Lee Green Footfall Heat Map, November 2024

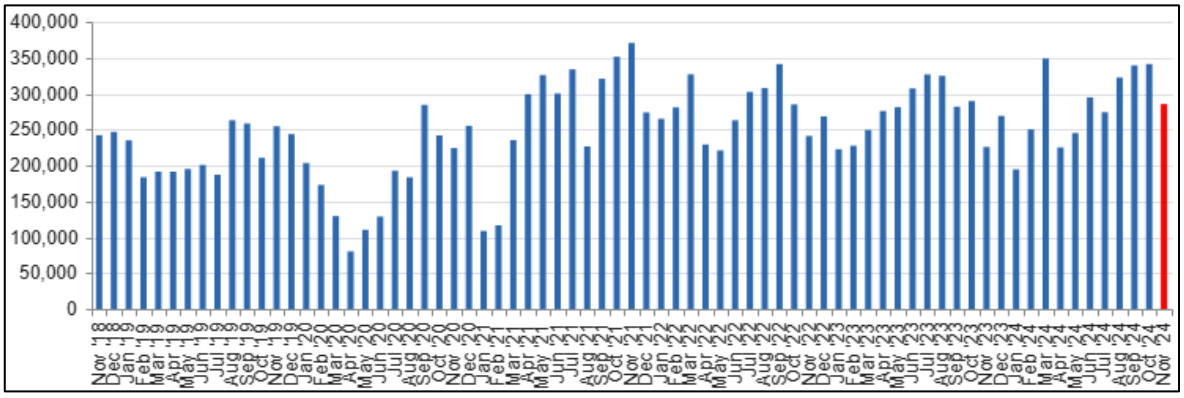


Source: Datscha

220. A section of Lee Green, located along Burnt Ash Road (by the Sainsbury's entrance), was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

221. As can be seen in the figure below, footfall levels from mid-2021 onwards have regularly surpassed what was recorded pre-Pandemic (late 2018 and throughout 2019).

Figure 62: Monthly Footfall Graph, November 2018 - November 2024, Burnt Ash Road



Source: Datscha

Accessibility

222. A central point within Lee Green provides a PTAL output of 3, indicating that public transport accessibility in the area is average and has significant room for improvement.

223. There are no tube or train station in Lee Green centre. Lee rail station is a 10-minute walk from the town centre providing Southeastern trains to Waterloo East, London Cannon Street, Slade Green, Dartford via Lewisham and Sidcup.

224. Bus stops are limited within the centre, there is two stops on A20 and A2212, with seven lines (1 night bus, N21) in each direction. Lines go to Trafalgar Square, Crystal Palace, New Cross Gate, Lewisham Station, Blackheath, Foots Cray, Locksbottom - Princess Royal Hospital, Plumstead and Woolwich.

225. The A20 runs through the centre and can be used to travel north towards central and south towards the M25.

226. Lee Green town centre had a car park located on Burnt Ash Road, which has now closed and is set to be redeveloped into a residential site. Sainsbury's car park also serves the town centre; this is for Sainsbury's customers only.

227. Cycling zones can be found at traffic lights, but there is a lack of cycle lanes within the centre. Additionally, as part of the town centre is partially located on A road, this limits safe travel for cyclists. Cycle racks can be located across the centre, there could be further cycle racks where there is a lack of on some roads like B212.

228. Traffic light crossings are located at the junction where the A20, A2212 and B212 meet. Further designated crossings are down these roads, supporting pedestrians navigating the busy roads.

Environmental Quality

229. The environmental quality of Lee Green is mixed. Whilst there are examples of well-kept buildings and attractive shop-frontages (particularly to the north of the centre), the shopping centre, which is primed for demolition, and neighbouring sites are currently acting a major detractor from the centre's offer.

Figure 63: Examples of Weaker Environmental Quality



Source: LSH Site Visit

Conclusion

230. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Strong convenience retail offer – led by a large Sainsbury's store
- Growth in footfall recorded when comparing pre-Pandemic to post-Pandemic
- Good bus routes and connections from the centre.

Weaknesses

- High vacancy rate (largely due to preparation for demolition of Leegate shopping centre, albeit located in London Borough of Lewisham)
- Limited food and beverage offer
- Centre is dominated by traffic, making it challenging for pedestrians and cyclists to navigate in parts
- The current nature of Leegate shopping centre (vacant and primed for demolition) is significantly detracting from the environmental quality of the centre.

Opportunities

- The redevelopment of Leegate shopping centre and neighbouring sites has the potential to:
  - Boost catchment population and expenditure
  - Supply new, high-quality retail and leisure units
  - Improve the mix of uses in the centre (medical centre proposed)
  - Improve the public realm offer
  - Boost Lee Green's image and draw, increasing the likelihood of visits from those beyond its immediate catchment.

Threats

- High/ increasing business operating costs
- High/ increasing infrastructure/ development costs pose a risk to the successful delivery of the Leegate shopping centre redevelopment
- Support to regenerate the centre via the adopted Lee Neighbourhood Plan.

8. North Greenwich Health Check

Overview

231. North Greenwich is designated as a proposed District Centre within The Royal Greenwich Local Plan: Core Strategy (2014), although it should be noted that the centre was not developed at the time the Core Strategy was being prepared. The London Plan 2021 identifies it within the list of 'Centres with Future Potential Network classification only'.

232. This study considers the potential to formally designate the centre as District Centre within the new Local Plan.

233. The centre boundary encompasses The O2 Arena to the north and stretches south to the associated car parks and IFS Cloud Greenwich Peninsula station (gondola lift).

234. North Greenwich is located at the northern edge of the Borough. The nearest centres are East Greenwich District Centre (approximately 1.5km south) and Greenwich District Centre (approximately 2.3km south-west). Woolwich Major Town Centre is circa 4km south-east, whilst Eltham Major Town Centre is around 6.4km south-east.

235. Whilst the centre is dominated by The O2 Arena and its associated retail and commercial leisure offer, significant development opportunities in the centre come in the form of residential. Plans have been approved for a 36-storey student accommodation block adjacent to the O2 whilst as well as a 38-storey residential tower on the site of the bus station.

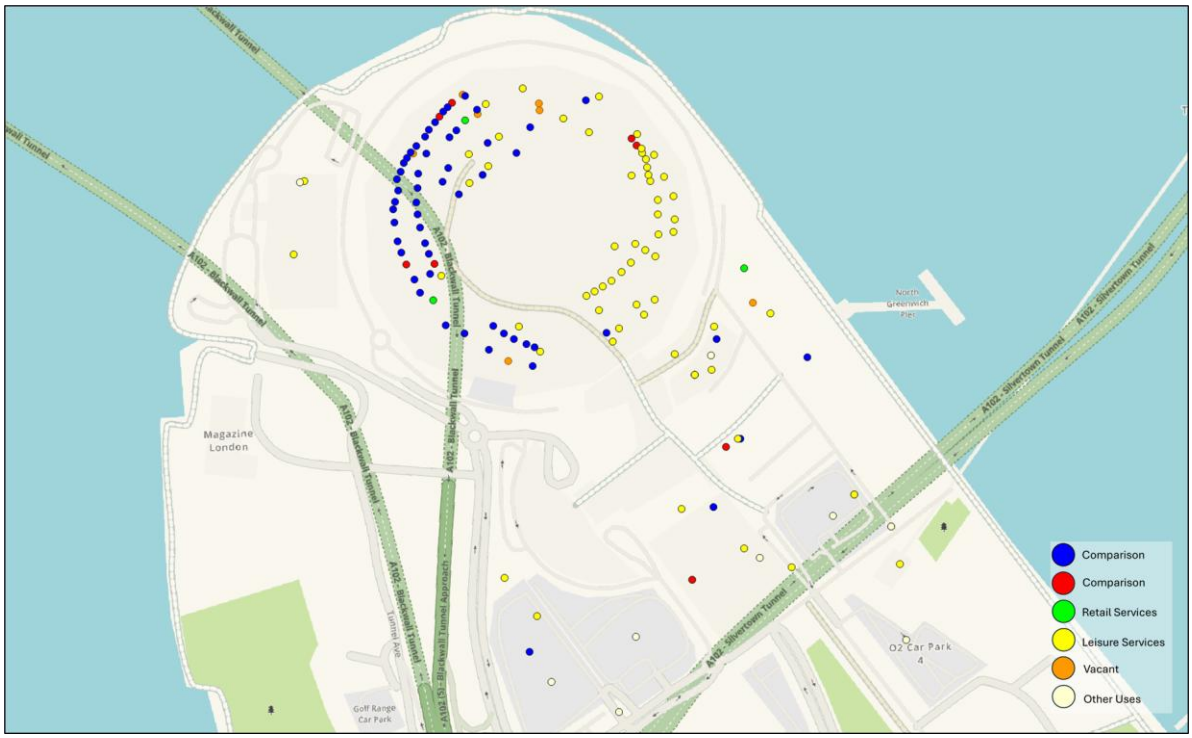
Figure 64: North Greenwich District Centre Boundary Map



Diversity of Uses

236. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess North Greenwich's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 65: Diversity of Uses Map, North Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

237. The table below shows that North Greenwich has a total of 153 units and an overall quantum of 42,180 sqm in floorspace.

Table 20: No. of Units in North Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		North Greenwich	London Average		North Greenwich	London Average
Comparison	60	39.2%	23.0%	13,390	31.7%	23.7%
Convenience	9	5.9%	12.1%	1,300	3.1%	21.8%
Leisure	62	40.5%	26.4%	26,010	61.7%	25.5%
Service	5	3.3%	24.1%	720	1.7%	16.6%
Miscellaneous	9	5.9%	6.4%	450	1.1%	3.7%
Vacant	8	5.2%	8.8%	310	0.7%	9.6%
Total	153	100.0%	100.0%	42,180	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

238. North Greenwich has a strong leisure and comparison retail offer. Service and convenience retail is significantly smaller in number of outlets and total floorspace taken. Comparison retail includes operators such as Moss Bros, French Connection and Castore within the Icon Outlet.

239. Leisure outlets make up 40.3% of total outlets, which is much higher than the London average of 26.4%. This is also reflected in the floorspace, where leisure takes more than half of the total floorspace at 61%. This is over double the London average of 25.5%. These outlets include IndigO2, Hollywood Bowl and Gordon Ramsey Street Burger.

Table 21: No. of Food & Beverage Units in North Greenwich

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		North Greenwich	London Average		North Greenwich	London Average
Bars, Pubs & Clubs	8	5.2%	2.9%	3,920	9.2%	6.8%
Cafes & Fast Food	18	11.7%	13.1%	2,350	5.5%	7.9%
Restaurants	25	16.2%	7.9%	11,810	27.7%	6.7%
Total	51	33.1%	24.0%	18,080	42.4%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

240. Food and beverage accounts for one-third of outlets in North Greenwich, higher than the overall F&B London average.

241. In terms of outlet numbers and floorspace, restaurants are the most common offer. It is greatly over the London averages for number of outlets and floorspace.

242. Bars, pubs & clubs are slightly above London averages while cafes & fast-food are slightly below.

Vacancies

243. There are a total of eight vacant outlets in North Greenwich which represents 5.2% of the overall outlets, lower than the UK average of 8.8%. The proportion of vacant floorspace of 0.7% at North Greenwich is significantly lower than the London average of 9.6%

244. The image below illustrates where vacant units are located in North Greenwich as of November 2024. As can be seen, six vacancies are in The O2 and two vacancies outside The O2. Since the O2 has a higher number of units, a proportionally greater share of vacancies is located there.

Figure 66: Vacancies Map, North Greenwich



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

245. North Greenwich has a strong presence of multiple representatives. For comparison goods, this is led by the Icon Outlet at The O2, where there are multiple fashion outlets such as Kurt Geiger, Reiss, and Jack Wills. Competitive socialising outlets like Boom Battle Bar and Toca Social and food and beverage outlets like Nando's, ASK Italian and Haute Dolci enhance the leisure offer of the centre.

Figure 67: Boom Battle Bar



Source: LSH Site Visit

246. There are a very limited number of independent representations at North Greenwich. A notable outlet is Mamma Mia! The Party, a unique entertainment venue. Other independent retailers are galleries like Now Gallery, Firepit Art Gallery and Studios CIC. There is also Bureau Restaurant, Mint Café, Villa Valentina and Outrivals.

Markets

247. There are no markets in North Greenwich, however a food hall is present. The Canteen Food Hall & Bar is located in the Design District, a few minutes' walk away from North Greenwich station. There are six vendors offering a range of street food and drinks. The food hall, built in 2021, is a modern structure made from metal support and a transparent shell, resembling a green house.

Retailer Requirements

248. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 22: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

249. As of February 2025, a review of published operator requirements identified 1 retail, leisure and service operator requirement, seeking a maximum floorspace of up to 2,323 sqm. This retailer is M&S Food. For a comprehensive list relating to all centres, please refer to Appendix C1.

250. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

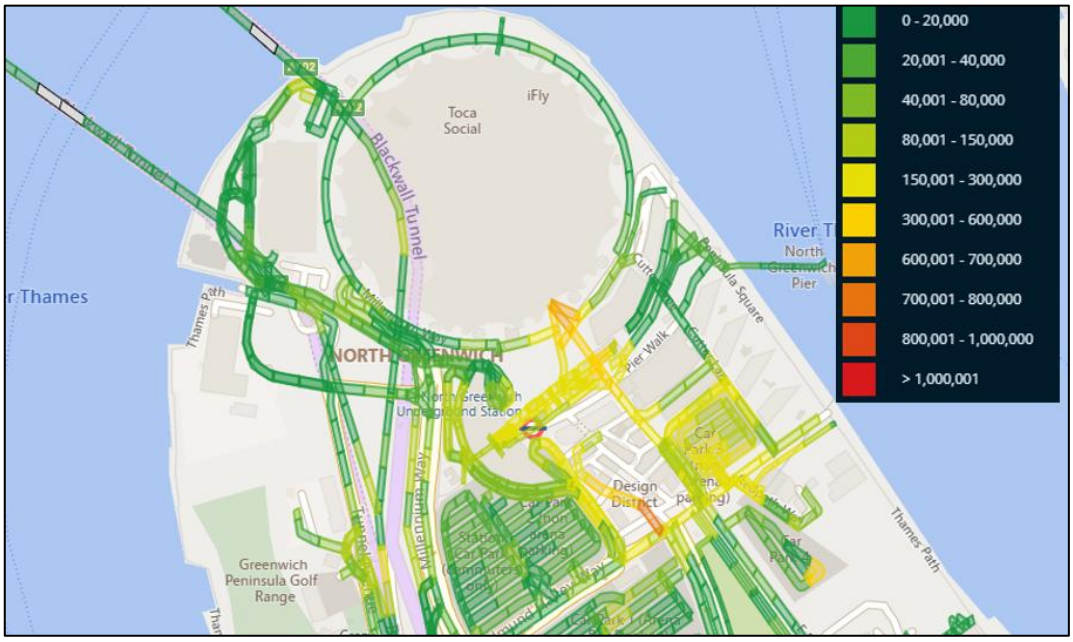
251. It is also possible that these operators are not looking for opportunities in North Greenwich specifically, rather they are looking for opportunities in areas similar to and including North Greenwich.

252. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Pedestrian Flows

253. The figure below illustrates the pedestrian flows for North Greenwich in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall levels are highest within Peninsula Square (particularly by the entrance to the O2) and the Design District.

Figure 68: North Greenwich Footfall Heat Map, November 2024

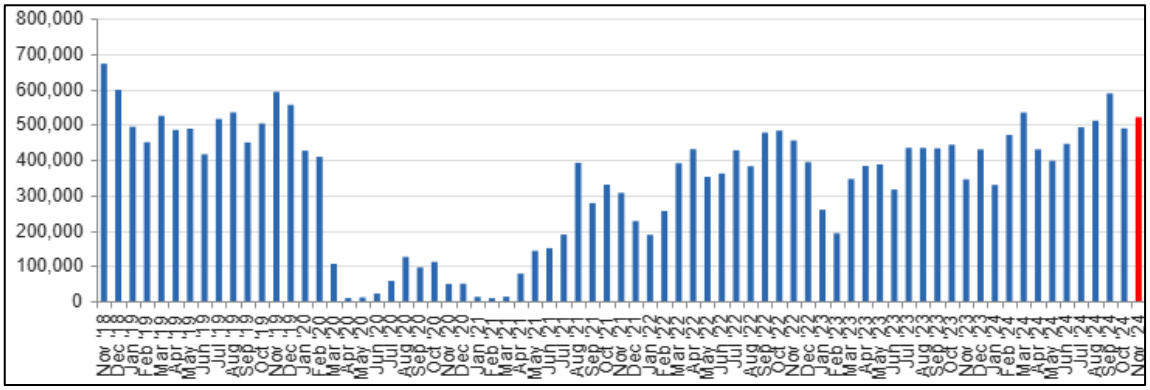


Source: Datscha

254. A section of North Greenwich, located in Peninsula Square, was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

255. As can be seen in the figure below, footfall levels dropped dramatically in line with the Pandemic and related restrictions on travel and activities. From late 2021, there has been positive general growth, with figures recorded in 2024 (March and September) suggesting an almost complete post-Pandemic recovery.

Figure 69: Monthly Footfall Graph, November 2018 - November 2024, Peninsula Square



Source: Datscha

Accessibility

256. A central point within North Greenwich provides a PTAL of 5, indicating that public transport accessibility in the area is good.

257. North Greenwich Underground Station is a located next to The O2, within a few minutes walking distance. Regular services to Stanmore and Stratford are available on the Jubilee Line.

258. Bus services can be picked up at the North Greenwich Station, providing connections to Bexleyheath, Lewisham Shopping Centre, Stratford International, Kidbrooke, Abbey Wood, Erith and Chislehurst.

259. There is good car parking provision at the centre. The car parks are split into four areas towards the south of the centre, with over 2,500 bays available. O2 car parks are split by reason, car park 1 is for event parking & drop off while car parks 2-4 are for non-event parking. Even with the large number of bays available, parking does get busy occasionally due to events.

260. Thames Clipper, a 3-minute walk from The O2, is available on the north pier, with services to Battersea Power Station, Barking and Putney Pier in the RB1, RB2 and RB6.

261. IFS Cloud Cable Car also allows for transport to and from Royal Docks. For the month ending 23 November 2024, there were 107,674 passengers.

Figure 70: IFS Cloud Cable Car



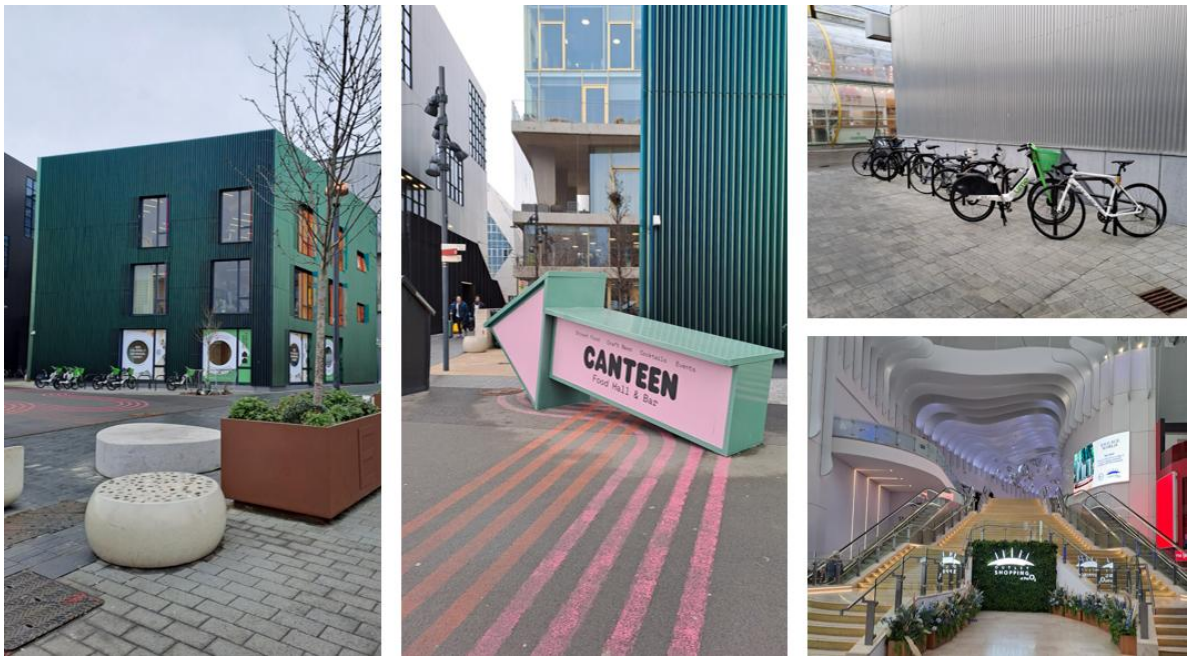
Source: LSH Site Visit

262. The central area is largely pedestrianised, providing safe accessibility for cyclists and pedestrians. Olympian way, running along the Thames, is a restricted access road allowing easy access for cyclists to North Greenwich from the east and west. Surrounding roads around North Greenwich do have cycle lanes available, yet these roads can get busy with traffic. Cycle racks can be found around the centre with over 400 provided for convenient storage. Lime bikes can be seen scattered around, with a concentration outside North Greenwich station.

Environmental Quality

263. The environmental quality of North Greenwich is generally good, with a blend of modern architecture, attempts to soften the environment with the use of planters and ample provision of street furniture including seating and cycle racks. The indoor centre at the O2 offers a modern, clean, bright and spacious environment to shop and dine. The largely pedestrianised centre creates a safe and enjoyable space for those navigating by foot. Peninsula Square, whilst a safe environment for pedestrians, is a hard space that lacks greenery and vibrancy.

Figure 71: Examples of Stronger Environmental Quality



Source: LSH Site Visit

Evening and Night Time Economy

264. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within North Greenwich have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

265. The main destination of North Greenwich is The O2, attracting international and national tourists and visitors. This has modelled the retail positioning of the centre to have a strong provision of leisure and comparison retail, as outlined within the Diversity of Uses chapter. Leisure retail makes up over half of the total retail and leisure offer and food and beverage makes up over a quarter of the total floorspace.

266. There is a wide array of music venues, competitive socialising venues, activity operators, restaurants, pubs and bars at North Greenwich, making it an ideal hotspot for a range of entertainment for all visitors.

267. Competitive socialising venues play a key role in the leisure provision, with notable operators such as Boom Battle Bar and Mamma Mia! The Party. These venues offer entertainment till late hours into the evening, making it an ideal destination for entertainment and activities. North Greenwich also has operators that provides to all ages and interests with Oxygen Activeplay and Hollywood bowl.

268. The bars remain open till late however only a couple are open past 12am. Therefore, North Greenwich is not considered a late-night offering, coupled with restricted late-night transport. Instead, the centre provides an excellent setting for evening entertainment to moderate hours.

269. Peninsula Golf Range and Crazy Putt mini golf, served with a bar and restaurant is a short walk away from North Greenwich station.

Table 23: Leisure Operator Sample

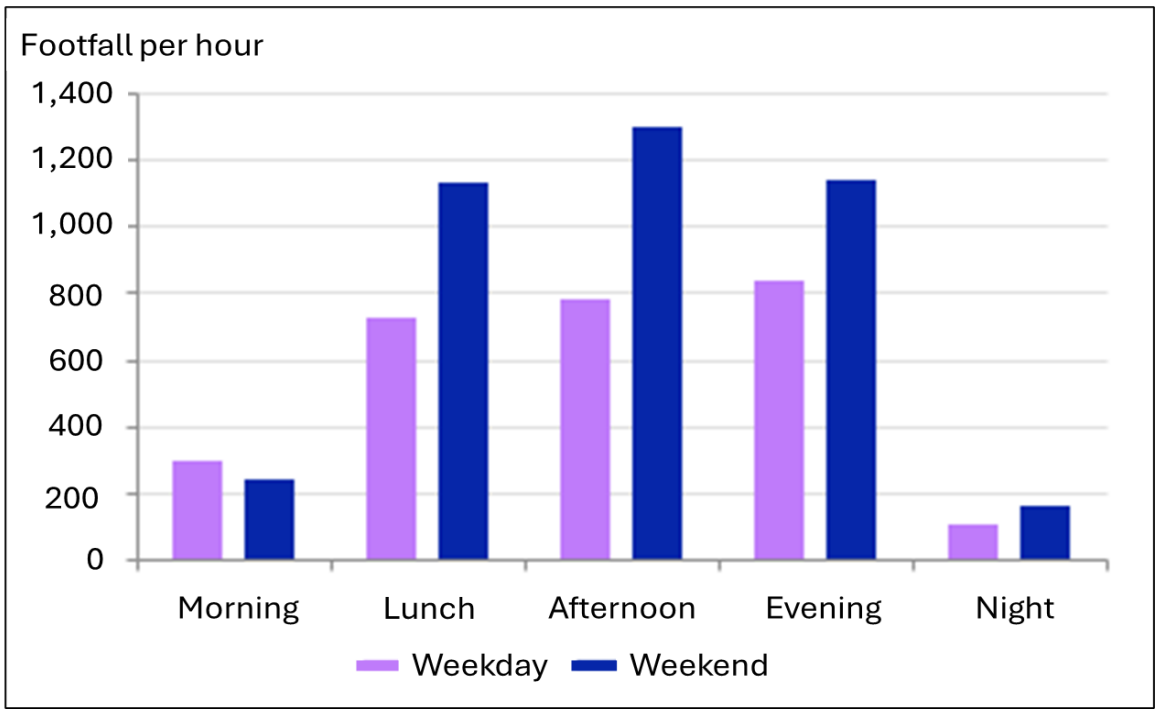
Retailer Name	Type	Open	Close
The O2	Music Venue	All day shows	-
Indigo at the 02	Music Venue	All day shows	-
Hollywood Bowl	Bowling	10-12pm	11-12am
Cineworld	Cinema	All day screenings	-
iFly	Skydiving	10am	10pm
Oxygen Activeplay	Trampoline Park	9-9:30am	7pm
Mamma Mia! The Party	Immersive show and restaurant	12-6:30pm	11pm
Thrill Coaster	VR Arcade	11-12pm	7-8pm
02 Blueroom	Bar	9-10am	5-6pm
American Express lounge	Lounge	5:30pm	-
Toca Social	Bar	9-3pm	11-1am
Boom Battle Bar	Games bar	10-12pm	12-1am
Slug & Lettuce	Bar	11:30-12pm	10-12am
All Bar One	Bar	10am	10:30-12am
Busaba Eathai	Restaurant	12pm	9-11pm
Gordon Ramsay	Restaurant	11:30am	10-11pm
Canteen Food hall & Bar	Food hall & Bar	8-10am	10:30-11pm

Source: LSH Research

270. The figure below shows how footfall levels differ across different parts of the day. It relates to footfall for November 2024 in Peninsula Square. As can be seen,

pedestrian activity in an evening (5pm – 9pm) is high and similar to the levels seen at lunch and in the afternoon. Weekend evening footfall levels are markedly higher than weekday, which is a theme seen from lunch time onwards.

Figure 72: Footfall by Time of Day, Peninsula Square, November 2024



Source: MSCI

Conclusion

271. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Vacancy rate is below the London average – particularly vacant floorspace (0.7% in North Greenwich compared to London average of 9.6%)
- High footfall throughout lunch, afternoon and evening
- Strong provision of leisure and comparison retail uses (very strong lunch to evening offer and decent night offer)
- Very strong multiple representation
- The O2 as a major entertainment venue generating high volumes of footfall
- Regeneration projects (Design District) attracting businesses and increasing building use types
- Good public transport links
- Footfall is stabilising to pre-Pandemic levels
- Good pedestrian accessibility due to limited presence of road networks.

Weaknesses

- Lack of community feel, with majority of outlets being multiple representation

- Lack of greenery and access to nature within the centre.

Opportunities

- Residential development opportunities can boost catchment population and expenditure, and potentially provide green space within the centre as part of the developments
- Build on the successes of having a strong entertainment offer, making the centre a hub of other activities
- Opportunity to make more of Peninsula Square, with the potential for a softening of the environment through green space and vibrancy.

Threats

- High/ increasing business operating costs
- Further loss of physical presence of national multiples following difficulties for the likes of WHSmith, Wilko and Body Shop.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.

9. Plumstead District Centre Health Check

Overview

272. Plumstead is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary stretches along Plumstead High Street from the station to the west to Barth Road to the east, as well as south along Lakedale Road.

273. Plumstead is located to the east of the Borough, approximately 1km east of Woolwich major town centre.

274. A £5.2 million investment, funded by the Mayor of London's Good Growth Fund and matched by the Royal Borough of Greenwich, aims to rejuvenate Plumstead High Street, Lakedale Road and White Hart Road. The project focuses on enhancing public spaces, improving shopfronts and improving safety in the area. Investment has also gone into Plumstead train station, with £4.6 million from Transport for London's 'Access for All' scheme going into the installation of two lifts to allow for step free access to the station. These were delivered in November 2024.

Figure 73: Plumstead District Centre Boundary Map



Diversity of Uses

275. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Plumstead's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 74: Diversity of Uses Map, Plumstead

276. 

Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

277. The table below shows that Plumstead has a total of 138 units and an overall quantum of 14,820 sqm in floorspace.

Table 24: No. of units in Plumstead

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Plumstead	London Average		Plumstead	London Average
Comparison	18	13.0%	23.0%	2,570	17.3%	23.7%
Convenience	25	18.1%	12.1%	3,380	22.8%	21.8%
Leisure	35	25.4%	26.4%	3,150	21.3%	25.5%
Service	43	31.2%	24.1%	4,030	27.2%	16.6%
Miscellaneous	12	8.7%	6.4%	890	6.0%	3.7%
Vacant	5	3.6%	8.8%	800	5.4%	9.6%
Total	138	100.0%	100.0%	14,820	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

278. In terms of number of outlets and floorspace, service retail occupies the highest proportion in Plumstead, higher than the London average. Comparison retail is underrepresented compared to the London average, while leisure retail is slightly behind the average. Comparison retailers include Poundland, House of Scents London, Winter Windows and Temple Pharmacy.

279. Miscellaneous outlets slightly over perform the London average, however the floorspace occupies a higher percentage of space, compared to the London average. Solicitors are the majority type of the miscellaneous outlets such as Success Legal Practice, other outlets include accountants and doctor's surgery.

Table 25: No. of Food & Beverage Units in Plumstead

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Plumstead	London Average		Plumstead	London Average
Bars, Pubs & Clubs	2	1.4%	2.9%	500	3.4%	6.8%
Cafes & Fast Food	22	15.9%	13.1%	1,550	10.5%	7.9%
Restaurants	8	5.8%	7.9%	770	5.2%	6.7%
Total	32	23.2%	24.0%	2,820	19.0%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

280. Bars, pubs & clubs and restaurant outlets and floorspace are below the London averages. Bars, pubs & clubs are occupying the least amount of retail outlets, with only 2 units, accounting for 1.4% of units and 3.4% of floorspace. This proportion of floorspace is half the London average of 6.8%. These outlets are Craft Union Pub and Gurkha Club.

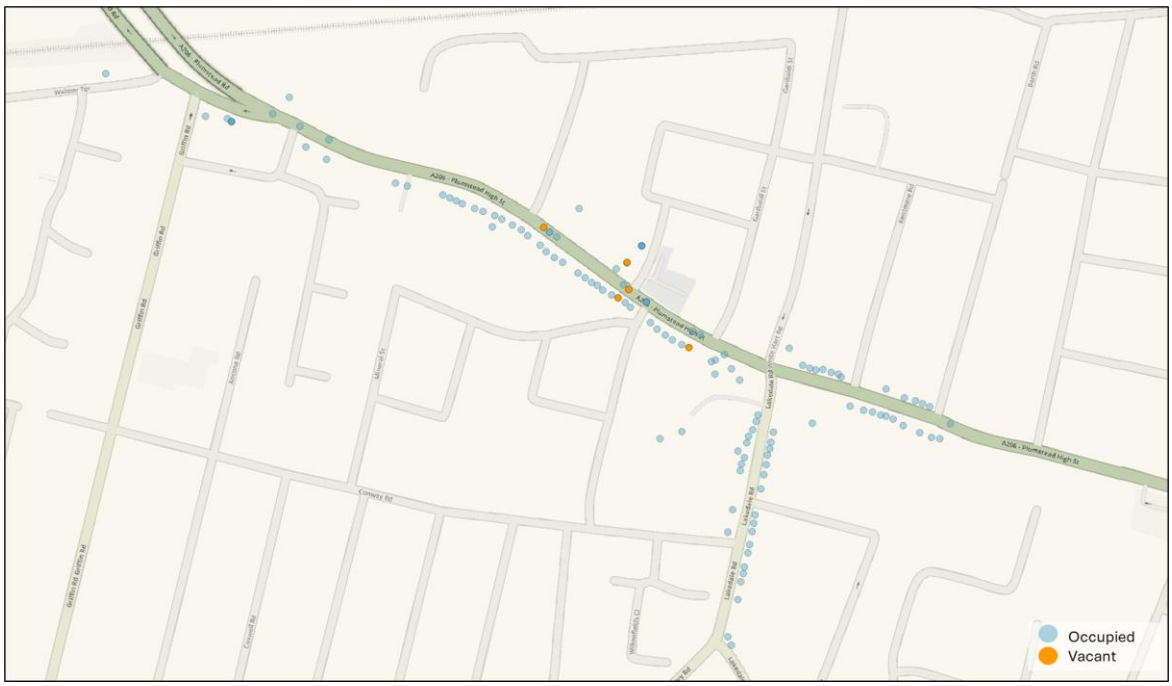
281. The majority of food & beverage outlets in Plumstead are cafes & fast-food, accounting for almost 70% within food and beverage. In Plumstead this accounts for 15.9% of total retail outlets and 10.5% of floorspace - overrepresented compared to the London average. Key outlets are The Cakery, Kingsmeat Smokehouse and KFC.

Vacancies

282. There are a total of 5 vacant outlets in Plumstead which represents 3.6% of the overall outlets, lower than the UK average of 8.8%. 5.4% of the floorspace in Plumstead is vacant, lower than the UK average of 9.6%. This is a sign of a strong local economy and healthy high street as most storefronts are occupied.

283. The image below illustrates where vacant units are located in Plumstead as of November 2024. As can be seen, the vacancies are focused around the centre of Plumstead.

Figure 75: Vacancies Map, Plumstead



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

Multiple and Independent Retail Representation

284. Plumstead has a limited number of national multiples. Those present include Tesco Express, Greggs, KFC, Iceland and Poundland.

Figure 76: Iceland Store



Source: LSH Site Visit

285. There is a large presence of independent grocery store outlets such as Dadoo's Foodstore, Milsha Store, and Lumbini. Other outlets include Mira Barbers, Temple Pharmacy, Eden Estates and Anugraha Jewellers.

Retailer Requirements

286. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 26: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

287. As of February 2025, a review of published operator requirements identified 1 retail, leisure and service operator requirement, seeking a maximum floorspace of up to 2,462 sqm. The retailer is Lidl. For a comprehensive list relating to all centres, please refer to Appendix C1.

288. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

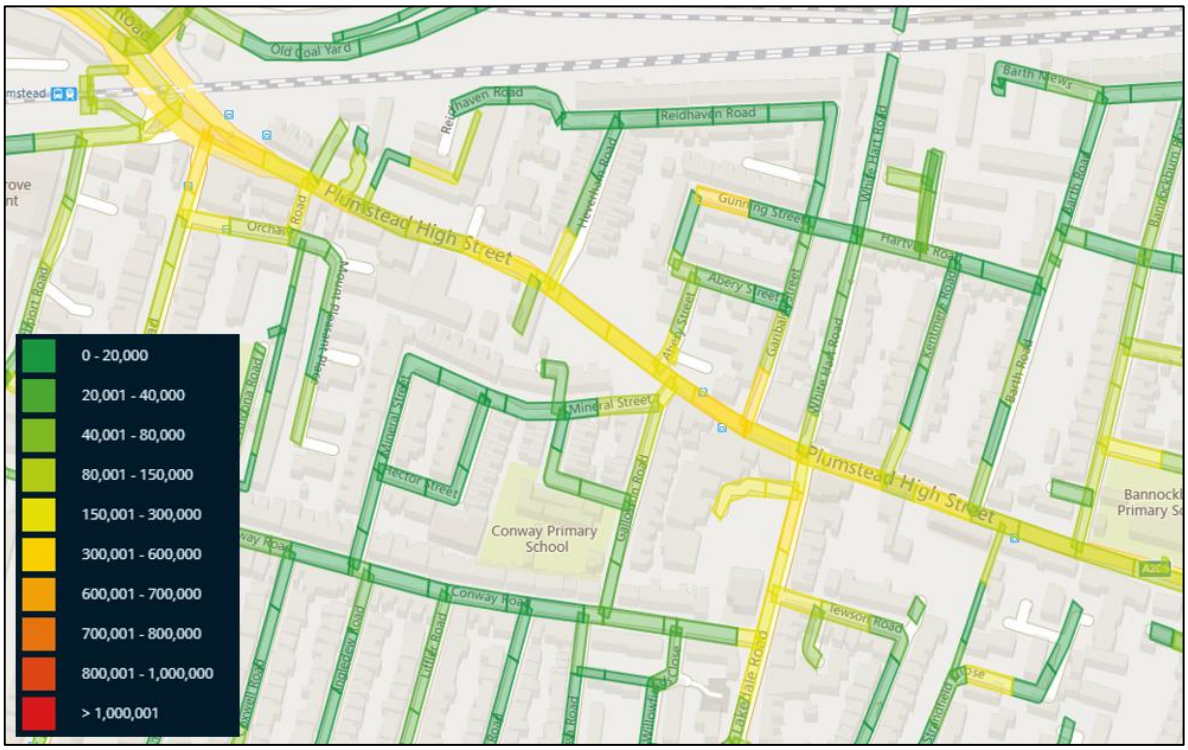
289. It is also possible that these operators are not looking for opportunities in Plumstead specifically, rather they are looking for opportunities in areas similar to and including Plumstead.

290. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Pedestrian Flows

291. The figure below illustrates the pedestrian flows for Plumstead in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, footfall levels are relatively spread out along Plumstead High Street and Lakedale Road, with no particular hot spots.

Figure 77: Plumstead Footfall Heat Map, November 2024

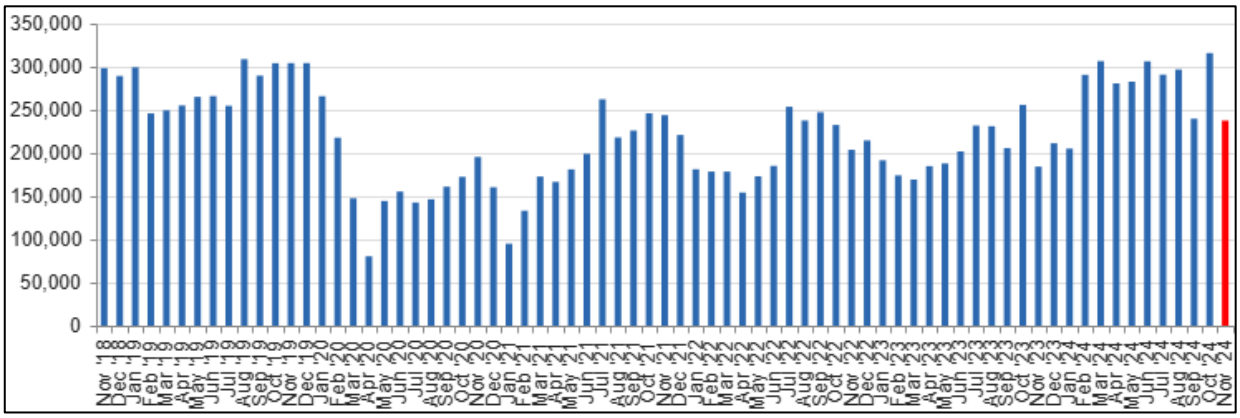


Source: Datscha

292. A section of Plumstead, at the Plumstead High Street/ Lakedale Road junction, was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

293. As can be seen in the figure below, footfall levels have bounced back following the Pandemic period. Monthly figures in 2024 surpassed 300,000 on three occasions (March, June and October) – a feat last seen in December 2019.

Figure 78: Monthly Footfall Graph, November 2018 - November 2024, Plumstead High Street/ Lakedale Road junction



Source: Datscha

Accessibility

294. Central points within Plumstead provide a PTAL output of 6a and 5, indicating that public transport accessibility within the area is good.

295. Plumstead Station is located to the west of Plumstead High Street, making it easily accessible for those travelling by train. The station supports Thameslink and Southeastern rail, with trains to London Cannon Street, Greenwich, Lewisham, Bexleyheath, Dartford, Rainham and Luton airport.

296. Bus services can be picked up throughout the high street, supporting routes to Crystal Palace, Peckham, Woolwich, Woolwich Common Queen Elizbeth Hospital, North Greenwich, Bluewater, Bexleyheath, Erith and Thamesmead.

297. Traffic flow is active in both directions along the high street, with roads converging onto it, resulting in a busy road with cars and buses. There are traffic light crossings strategically located to support with safe pedestrian access.

298. The roads are narrow, and don't allow much room for cycle lanes, creating a hazardous environment for cyclists. There are a few cycle racks provided throughout the centre, providing a convenient facility to store their bikes whilst in the area.

299. Car parks are limited at Plumstead. Abery Street Car park located in a central point of the high street, offers 24 bays and 2 disabled bays. Side roads that converge onto the high street are controlled zones from 9am to 5:30pm and are therefore limited during the day.

Environmental Quality

300. The environmental quality of Plumstead is fair, with generally well-kept buildings and shop-frontages (partly due to the limited number of vacant units), bold signage in the form of artwork and small pockets of greenery. Provision of benches and cycle storage is limited but is present along Lakedale Road and to the east of the centre. Bins can be found across the centre, helping to prevent litter within Plumstead.

Figure 79: Plumstead High Street Artwork Signage



Source: LSH Site Visit

Conclusion

301. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Good presence of independent representation
- Good public transport accessibility
- Low vacancy rate, which boosts activity and environmental quality
- Footfall has bounced back from the Pandemic period.

Weaknesses

- Low level of retail requirements
- Weak anchor stores
- Lack of parking
- Challenging environment in parts for cyclists and pedestrians.

Opportunities

- Increase pedestrian and cycling safety
- Increase public space environmental quality.

Threats

- Competition from nearby retail centres that offer a larger mix of uses (Woolwich)
- High/ increasing business operating costs.

10. Thamesmead District Centre Health Check

Overview

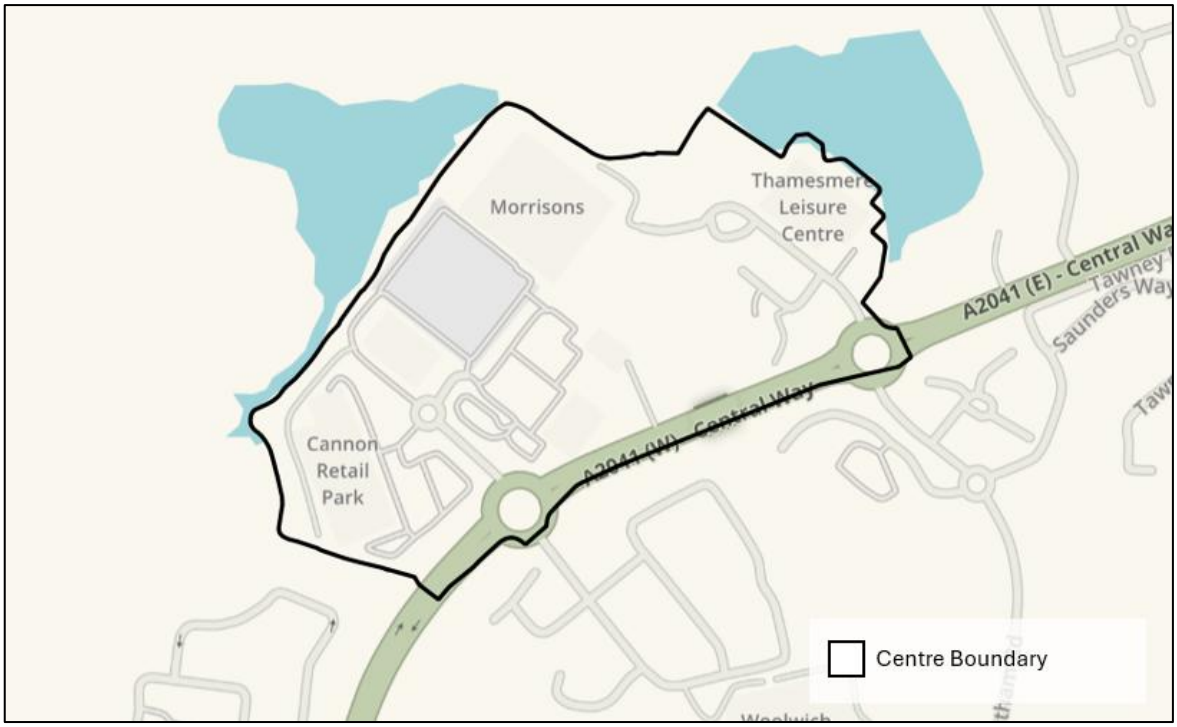
302. Thamesmead is designated as a District Centre within The Royal Greenwich Local Plan: Core Strategy (2014). The centre boundary encompasses Cannon Retail Park, Morrisons and its associated petrol filling station and Thamesmead Leisure Centre. The centre is also designed in the London Plan as an Opportunity Area which promotes the delivery of new homes as part of the redevelopment of the entire centre.

303. Thamesmead is located towards the north-eastern edge of the Borough, with its nearest neighbouring centres being Woolwich Major Town Centre (2.8km south-west) and Plumstead District Centre (2.2km south-west).

304. Thamesmead is earmarked for major residential-led regeneration which would be unlocked through proposals by Transport for London (TFL) to extend the Docklands Light Rail (DLR) system to the area. This would include a DLR station within the town centre. The proposals are reviewed in **Section 7, Volume 1**.

305. A proposed bus rapid transit (BRT) project, if delivered, will connect the centre with more communities

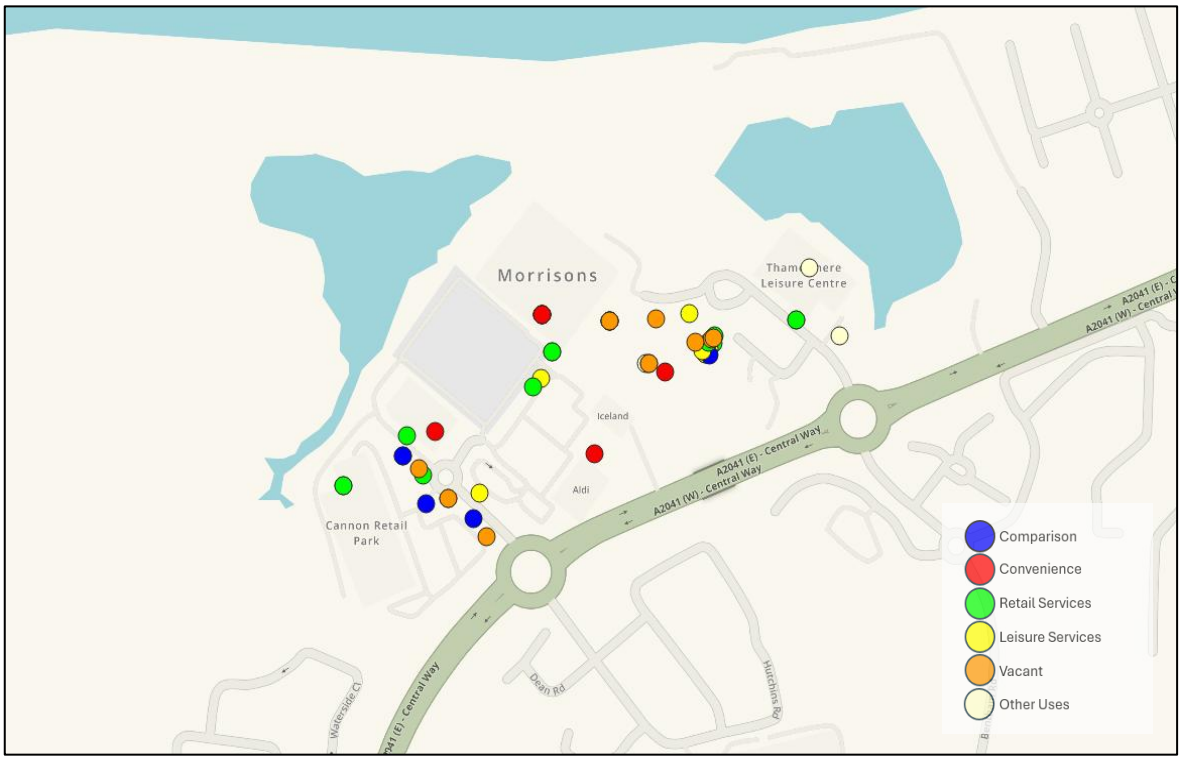
Figure 80: Thamesmead District Centre Boundary Map



Diversity of Uses

306. Data from Green Street, via the GLA High Streets Data Service from November 2024 has been used to assess Thamesmead's mix of uses. The figure below shows the area that the data relates to, as well as the mix of uses present within the centre.

Figure 81: Diversity of Uses Map, Thamesmead



Source: Data from Green Street, via the GLA High Streets Data Service and mapped by LSH

307. The table below shows that Thamesmead has a total of 42 units and an overall quantum of 21,480 sqm in floorspace. Thamesmead has the fewest number of outlets compared to the other centre in this study.

Table 27: No. of units in Thamesmead

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Thamesmead	London Average		Thamesmead	London Average
Comparison	6	14.3%	23.0%	3,910	18.2%	23.7%
Convenience	5	11.9%	12.1%	10,330	48.1%	21.8%
Leisure	7	16.7%	26.4%	1,360	6.3%	25.5%
Service	9	21.4%	24.1%	1,380	6.4%	16.6%
Miscellaneous	4	9.5%	6.4%	190	0.9%	3.7%
Vacant	11	26.2%	8.8%	4,310	20.1%	9.6%
Total	42	100.0%	100.0%	21,480	100.0%	100.0%

Source: Data from Green Street, via the GLA High Streets Data Service

308. The number of convenience outlets is aligned with the London average, however convenience floorspace occupies more than half of the floorspace used at 47.9%, which is over double the London average of 21.8%. There are number of large stores: Morrisons, Iceland and Aldi.

309. Comparison stores cover 14.3% of Thamesmead, this is below the London average of 23.0%. Key comparisons stores include B&M Bargains, Pets At Home, Poundland and Superdrug.

Figure 82: Aldi Store



Source: LSH Site Visit

310. Services outlets are the most common use found within the centre – accounting for 20.9% with 9 units in Thamesmead, yet this is slightly below the London average. Floorspace taken is 10.2 percentage points lower than the London average. Key operators are Better Leisure Centres, Goddard Veterinary group and Jamie Nails.

311. The proportion of miscellaneous outlets is slighting above the London Average, but below the floorspace London average, occupying only 0.9% of floorspace in Thamesmead. This floorspace is created by car park take up and a community centre.

Table 28: No. of Food & Beverage units in Thamesmead

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Thamesmead	London Average		Thamesmead	London Average
Bars, Pubs & Clubs	1	2.4%	2.9%	450	2.1%	6.8%
Cafes & Fast Food	5	11.9%	13.1%	810	3.8%	7.9%
Restaurants	0	0.0%	7.9%	0	0.0%	6.7%
Total	6	14.3%	24.0%	1,260	5.9%	21.5%

Source: Data from Green Street, via the GLA High Streets Data Service

312. Food & beverage provision in Thamesmead is low, with no restaurant and just one outlet in the 'bars, pubs & clubs' category. Therefore, the number of units and floorspace is lower than the London averages.

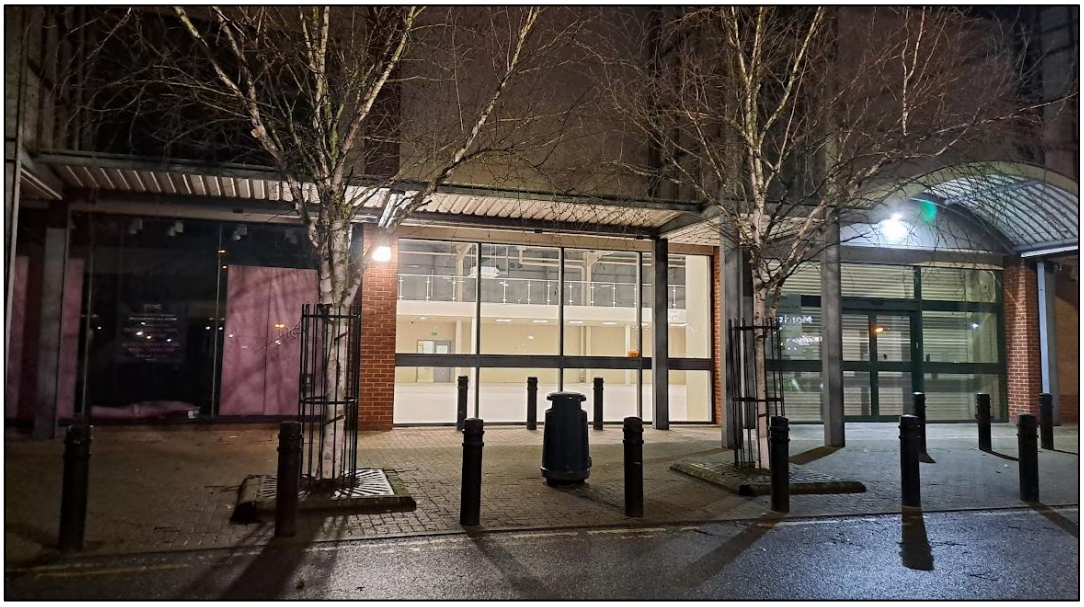
313. Cafes & fast food in Thamesmead is the largest offer with 5 outlets occupying 11.6% (below the London average of 13.1%). This accounts for only 3.8% of the floorspace. These include Pizza Hut Delivery, McDonald's, KFC, Food Angels and Britanna Fish bar.

Vacancies

314. There are a total of 11 vacant outlets in Thamesmead which represents 25.6% of the overall outlets, which is higher than the London average of 8.8%. 20.0% of the floorspace is vacant, higher than the London average of 9.6%.

315. Vacant units take the majority of the retail outlet space - over a quarter of total retail units.

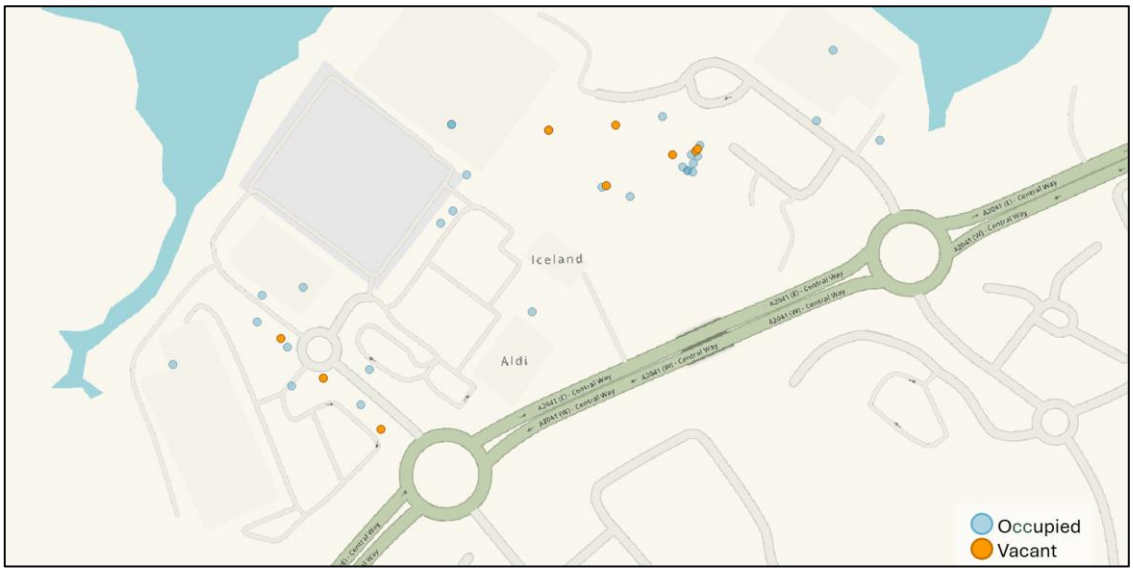
Figure 83: Vacant Unit on Cannon Retail Park



Source: LSH Site Visit

316. The image below illustrates where vacant units are located in Thamesmead as of November 2024. As can be seen vacant units are scattered, with four vacant units found at Cannon retail park and seven at Joyce Dawson Way.

Figure 84: Vacancies Map, Thamesmead



Source: Data from Green Street, via the GLA High Streets Data Service

Multiple and Independent Retail Representation

317. Thamesmead is a relatively small centre, featuring a retail park, which makes it a likely home of national multiples. National multiples present include large multi-good retailers like B&M Bargains, Poundland and Pets At Home, and supermarkets Aldi and Morrisons. As well as food & beverage brands like McDonald's and KFC, which both have standalone units with associated drive-thrus.

318. Independent outlets are mainly services-based covering nail salons and healthcare, there are a couple of food & beverage outlets (Food Angels and Britanna Fish Bar), an independent grocery (John & Bilo Foods) and a crafts store (Craft Jones).

Retailer Requirements

319. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. A summary of the latest published market demand information is set out in the figure below.

Table 29: Retailer Requirements Overview

		Woolwich	Eltham	Blackheath	Greenwich	Kidbrooke	North Greenwich	Plumstead	Thamesmead	Abbey Wood	Shooters Hill
No. of Outlets	Comparison	2	5	10	2	0	0	0	2	1	0
	Convenience	1	2	3	1	2	1	1	1	0	2
	Leisure	4	5	7	18	1	0	0	0	0	0
	Service	0	1	0	0	0	0	0	0	0	0
	Total	**7**	**13**	**20**	**21**	**3**	**1**	**1**	**3**	**1**	**2**
Max Floorspace (sqm)	Comparison	465	4,227	4,645	446	0	0	0	1,672	372	0
	Convenience	2,787	269	2,611	139	4,784	2,323	2,462	2,462	0	4,784
	Leisure	4,208	4,710	6,578	5,710	Unknown	0	0	0	0	0
	Service	0	186	0	0	0	0	0	0	0	0
	Total	**7,460**	**9,392**	**13,834**	**6,295**	**4,784**	**2,323**	**2,462**	**4,134**	**372**	**4,784**

Source: The Requirement List

320. As of February 2025, a review of published operator requirements identified three retail, leisure and service operator requirements, seeking a combined maximum floorspace of up to 4,134 sqm. These retailers include Topps Tiles and Lidl. For a comprehensive list, please refer to Appendix C1.

321. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

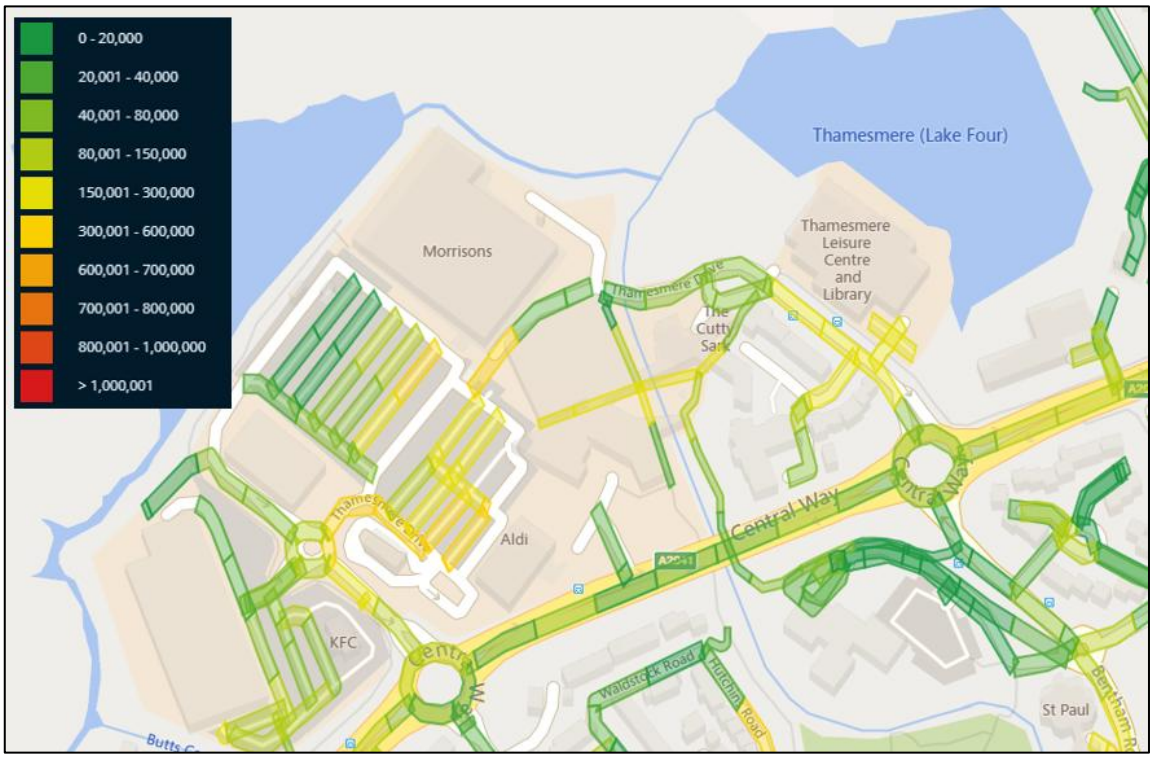
322. It is also possible that these operators are not looking for opportunities in Thamesmead specifically, rather they are looking for opportunities in areas similar to and including Thamesmead.

323. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Pedestrian Flows

324. The figure below illustrates the pedestrian flows for Thamesmead in the form of a heat map showing total pedestrian movements for November 2024.

Figure 85: Thamesmead Footfall Heat Map, November 2024

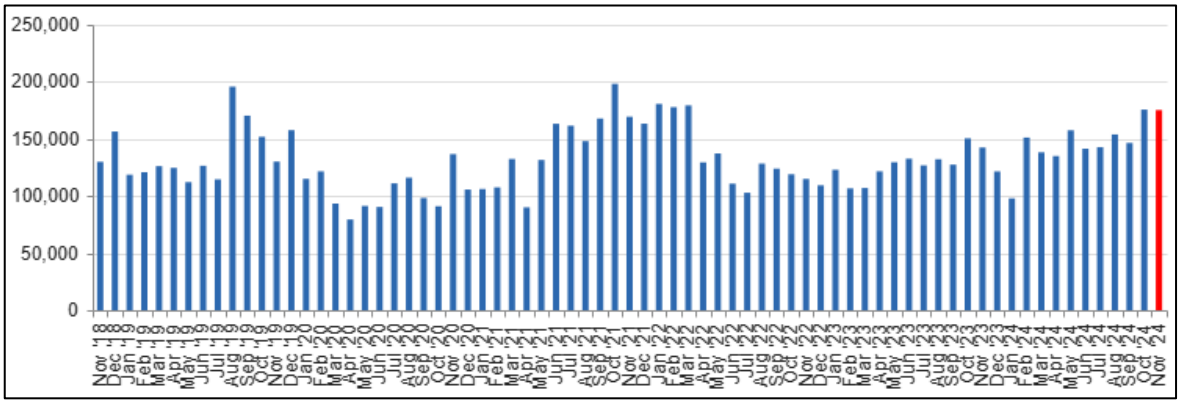


Source: Datscha

325. A section of Thamesmead, along Joyce Dawson Way (western entrance) was sampled to obtain information on how footfall levels have changed between November 2018 and November 2024.

326. As can be seen in the figure below, footfall levels have remained relatively consistent throughout this period. The Pandemic impact seen clearly across other centres is not as evident here. Late 2021 and early 2022 represents the height of pedestrian activity for this period, with the two most recent months recorded (October and November 2024) showing positive signs as the busiest months since March 2022.

Figure 86: Monthly Footfall Graph, November 2018 - November 2024, Joyce Dawson Way (western entrance)



Source: Datscha

Accessibility

327. Central points within Thamesmead provide a PTAL output of 2 and 3, indicating that public transport accessibility within the area is low and difficult to reach.

328. There are no tube or rail stations within a short walking distance of Thamesmead. The closest station is Abbey wood, which is a 30-minute walk.

329. There are many buses running to Greenwich, Bexleyheath, Abbey Wood, Woolwich, Queen Elizbeth Hospital, Bromley, Central London, Peckham and a night bus, N1 to Tottenham Court Road.

330. There are no cycle lanes. In the absence of these, accessibility by bike can become unsafe due to volume of traffic and roundabouts. Cycle racks can be found within the centre, providing cyclists a convenient facility to safely store their bikes whilst in the area.

331. There is an abundance of car parking at Thamesmead, each retail spot; Cannon Retail Park, McDonalds, Morrisons and Joyce Dawson Way have a car park providing a combined 880 spots.

332. The retail centre is located off the A2041 with roundabouts allowing access to Cannon Retail Park and Joyce Dawson Way. Wide payments and designated pedestrian lights and zebra crossings can assist pedestrians cross between retail spots and bus stops.

Environmental Quality

333. Thamesmead comprises of two distinct elements – Cannon Retail Park to the west and Joyce Dawnson Way Shopping Centre and Morrisons to the east. Across both areas, units are generally well-kept, walkways are wide and clear and street furniture is strategically placed. Vacancies detract from the quality of the centre and there is a general lack of vibrancy, greenery and colour.

Conclusion

334. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) can be summarised as follows:

Strengths

- Retail is led by f national multiples, with good foodstore provision
- Good mix of national multiples and independent retailers
- Strong convenience offer (particularly relating to floorspace coverage)
- Consistent footfall activity over recent years – limited Pandemic impact
- Vast amounts of parking available.

Weaknesses

- Low comparison and leisure units, below London average
- Very high vacancy rates (outlets and floorspace)
- Low public transport and cycle accessibility

- Retail park format of the centre that does not offer the customer experience of a traditional high stree
- Lack of vibrancy and greenery.

Opportunities

- Improve the mix/ diversity of uses within the area (e.g., healthcare in the form of community diagnostics centres which are commonly being located within retail park units)
- Increase environmental quality by softening the centre through greenery and vibrancy
- Capitalise on the retailers who are interested in gaining representation within the centre.
- Leverage the proposed Bus Rapid Transit and DLR extension, which will connect the centre to more communities
- Major opportunities to regenerate the centre and deliver new homes and reconfigure the centre as part of the Opportunity Area designation

Threats

- High / increasing business operating costs
- Lack of public transport accessibility, increasing attractiveness for better connected centres
- High vacancy rate makes it likelier for shoppers to be drawn to alternative destinations with a stronger offer
- Further loss of physical presence of national multiples following difficulties for the likes of WHSmith, Wilko and Body Shop
- The growth in online shopping and its impact on brick-and-mortar retail outlets.

Lambert Smith Hampton

11. Summary

335. **Woolwich Major Town Centre** is a vital and viable centre that is generally performing well - serving its immediate catchment whilst also drawing visitors from beyond, in part due to its substantial retail and leisure offer. Further opportunities, such as Woolwich Lates to capitalise on evening draw and Woolwich Exchange have the potential to strengthen the centre again, with additional population, further diversification of uses, as well as improvements to the public realm.

336. **Eltham Major Town Centre** is a vital and viable centre that is generally performing well as a retail and leisure hub for the Borough, limited to a moderate evening and night time economy. However, opportunities such as the development at the Orangery Lane site provide a chance for Eltham to continue to develop and evolve, making it even more resilient to external pressures.

337. **Blackheath District Centre** is currently performing well as a District Centre, providing local residents with a good mix of day-to-day uses, whilst having the ability to draw visitors from further afield due to its high environmental quality and strong independent offer. There are improvements that need to be made to secure the long-term success of the centre, potentially through the introduction of new uses into the centre, the delivery of development opportunities or by working to accommodate retailers that have interest in gaining presence in Blackheath.

338. **East Greenwich District Centre** serves the day-to-day needs of its local residents, particularly through its provision of leisure and services uses. East Greenwich will need to look to diversify its uses in an effort to reduce vacancy rates and increase its resilience going forward.

339. **Greenwich (West Greenwich) District Centre** is currently a successful centre that serves its immediate catchment with day-to-day retail, leisure and services, whilst also attracting and satisfying the needs of those who travel from beyond to visit attractions and destinations such as the market and nearby park. There is significant interest from retailers in gaining presence within the area, and so efforts should be made to satisfy these requirements, thus strengthening the centre's offer going forward.

340. **Lee Green District Centre** is a vital and viable one, that serves the day-to-day needs of its immediate catchment. The Leegate Shopping centre redevelopment poses a huge opportunity for the centre to boost its catchment population, strengthen its diversity of uses and improve the public realm within the centre.

341. **North Greenwich District Centre** is currently performing well as a leisure and comparison day and evening retail destination, not just for the Borough, but for the broader City of London. The impact of the Pandemic did however highlight a potential over-reliance on these uses, and so ongoing opportunities for residential developments pose a chance for the centre to diversify slightly and improve its resilience.

342. **Plumstead District Centre** is vital and viable, serving the day-to-day needs of its immediate catchment. The centre has very limited evening and night time

economy. Investment into the high street and train station further strengthen Plumstead's role within the Borough.

343. **Thamesmead District Centre** provides a unique offer when compared to the rest of the centres within the Borough. The retail park's high vacancy rates, poses a risk to the centre's overall vitality. While Morrisons and Aldi continue to anchor regular footfall, the supporting retail offer needs improvement. There is potential to diversify uses, such as introducing healthcare facilities, to strengthen the centre's long-term appeal.