# Appendix 1
# Orpington Town Centre: Stage 1 (Evidence Base)

PREPARED FOR

**LONDON BOROUGH OF BROMLEY**

Table of Contents

# Appendices:

# Disclaimer

*In light of the 2016 Referendum concerning the UK's membership of the EU, we are now in a period of uncertainty in relation to many factors that impact the property investment and letting markets. At this time organisations involved in the industry are reflecting on the potential implications of the UK leaving the EU. Since the Referendum date it has not been possible to gauge the effect of the impact on rental and capital values, along with other elements affecting property appraisal.*

*Cushman & Wakefield continues to closely monitor market developments and trends in order that we can provide clients with the most up to date advice. The views contained in this document are provided in the context of this market uncertainty and as such our estimates and opinions are susceptible to change. Accordingly we advise that clients have regard to this risk and may need to commission further advice before acting on the opinions expressed.*

# 1. Introduction

## Purpose & Objectives

This report assesses the current performance of Orpington town centre to provide the London Borough of Bromley ("the Council") and other stakeholders with a comprehensive evidence base from which to inform decisions about future investment and development.

Like all town centres across the UK, Orpington operates in a dynamic market context presenting both challenges and opportunities. To plot a successful course for the future, the Council and stakeholders in the town centre should be proactive and work together to influence, rather than react to, future drivers of change.

Now is the right time to build a coherent strategy for Orpington town centre. Rockspring (long leaseholder of the Walnuts shopping centre) is considering options for the redevelopment of the centre and/or adjacent land owned by the Council, while the Orpington 1st BID has established a strong membership with a re-ballot taking place in Autumn 2017.

In response to this position our work will consider, in stages, three simple questions:

1. Where is Orpington town centre now?
2. Where do we want Orpington town centre to be?
3. How do we get there?

This report focuses on Stage 1 – the first of the above three questions – providing a foundation for the Council and its partners to consider future direction and delivery strategy during the next stages of the process. This includes an initial review of potential town centre development opportunities, as identified and agreed with the Council, to help identify priorities for future action.

## Report Structure

This report is styled as a concise Executive Report. It is accompanied by a series of Technical Papers as appendices, setting out further detail on the analysis informing the conclusions and recommendations reached.

To answer the question "*where is Orpington town centre now?"* it comprises the following tasks:

a) Overview of the key market trends affecting town centres and the implications for Orpington

b) Evidence on the current health and performance of Orpington

c) Benchmarking analysis to compare Orpington with other centres in London and across the UK

Our key findings and conclusions are presented in the form of a SWOT analysis, and inform our assessment of 8 potential development opportunities in the town centre.

Finally, our Stage 1 report outlines recommendations for workstreams to follow (i.e. Stages 2 and 3).

# 2. Market Trends

In this section we provide an overview of the national market context, where we highlight trends within specific market sectors. Such trends will be a driver of change in the town centre and are therefore an important factor in determining a coherent strategy for the future.

A brief overview of the national occupier markets, focusing on the retail and leisure sectors in particular, is provided in ***Technical Paper 1***. It highlights trends within specific market sectors and helps to identify some of the main factors that are influencing the scale and type of future space in town centres. We summarise the key points below.

The importance of the retail sector to town centres should not be understated. It is the key driver of activity and is vital in creating the environment for other main town centre uses (and residential uses) to be successful. In recent years, retail development in general has been relatively limited, as in other commercial property sectors, but the market overall still has an excess of space.

A driver behind this situation has been changing patterns of consumer and retailer demand. The key implications of trends in the retail and leisure sectors for future town centre development in Orpington can be summarised as follows:

- The continued growth of internet shopping, as well as other channels such as mobile and tablet, is likely to impact on footfall and squeeze retailers' profitability (this is a UK-wide issue). The town centre will need to embrace such technologies and **offer a high quality, all round experience** to consumers.
- Orpington town centre will continue to be affected by the polarisation and downsizing of national multiple retailers, so the challenge will be retaining and attracting new such retailers. Relocations to Nugent Shopping Park, amongst other factors, have left the town centre with **very few high street fashion retailers and void of any major variety stores** (e.g. Marks & Spencer).
- The importance of providing a range of store sizes, particularly larger and more flexible space, in order to respond to the needs of major retailers. However **there is a limit to which smaller centres such as Orpington can (re)attract major retailers** as they focus their activity in prime locations and/or on strengthening their online presence.
- Key to attracting new modern retailers will be creating the right conditions for investment, such as **high quality public realm**. The improvement of the shopping circuit including the square to the south of Walnuts shopping centre (and its connectivity with High Street) should therefore be prioritised.
- The increasing **importance of good quality leisure (including F&B) uses** in order to maximise the consumer's experience and dwell time in the town centre. Retail space is no longer enough to attract consumers to a centre. The new Odeon and F&B at Walnuts shopping centre provides a platform to enhance the family-friendly and/or evening F&B offer.
- New representation in the grocery sector is likely to be focused on smaller formats, with growing requirements from the **hard discounters** (e.g. Aldi and Lidl), in response to changing shopping habits.

Other factors affecting future space in town centres, of significance to Orpington, include:

- Strong **housing growth** in well connected, outer London boroughs such as Bromley. Orpington town centre has a good pipeline, including the Berkeley Homes' Brunswick Square scheme (83 one and two bedroom apartments[1] plus a health and well-being centre) and Pure Lake's

[1] For sale at £404,000-£419,000.

redevelopment of the Former Dairy Crest Depot site to the north of Walnuts shopping centre (20 flats and 8 family townhouses).

- The role of the **Private Rental Sector (PRS)** in the light of high house prices, curtailed access to mortgage finance and strong rental growth.
- The increasing use of **permitted development rights** to convert offices into residential use (e.g. Berwick House in Orpington town centre), following the Government's decision in April 2016 to make these rights permanent. Whilst clearly intended to contribute towards much-needed housing supply – which in town centre locations has the benefit of supporting mixed and more vibrant high streets – the conversions threaten the supply of office stock, often in under-supplied locations.
- **New forms of workspace** have been fuelled by flexible working strategies such as homeworking, shared space 'co-working' and serviced offices. Flexible space requirements amount to a small proportion of overall office stock but are spreading from Central London to the outer/ regional markets.
- **Further education** and their space requirements, including non-FE space (e.g. Orpington's London South East College has retail/ hospitality functions).
- The **public sector's space requirements** including the rationalisation and consolidation of their estate.

# 3. Orpington Healthcheck

This section provides an overview of the current health and performance of Orpington. Our more detailed analysis based closely on the healthcheck indicators set out in the national Planning Practice Guidance (PPG)[2] is provided in ***Technical Paper 2***.

To support our analysis, we have liaised with Orpington 1st and taken into account the research they have commissioned and shared with us[3]. The implications of this research (insofar as it relates to the town centre's current health) include:

- Orpington has declining vacancy rates;
- The town has a strong service-based retail offer but an under-supply of clothing and footwear retailers in particular;
- Leisure provision is improved but the F&B offer currently lacks choice; and
- Pedestrian flows have been broadly constant in recent months and are highest near Walnuts shopping centre.

Overall, it is our view that Orpington is a relatively healthy town centre and performs an important role serving largely the convenience-based needs of the local community. The town centre also has some leisure attractions. However, it has some weaknesses and areas for improvement (i.e. qualitative needs) as determined in our analysis below.

## Market Position

A key indicator of the status and performance of a centre is its retail ranking over time. *Figure 1* below shows the current position of Orpington town centre relative to surrounding/ competing centres. Each centre is assessed (by CACI Retail Footprint) having regard for all factors affecting performance, including the quality and quantity of retail provision, centre function and level of competition. This methodology allows each centre to be scored relative to one another and provides a useful barometer of a centre's status and performance.

*Figure 1 – Retail rankings*

| Centre | 2015 Rank | 2012 Rank | Change (2012-2015) |
|---|---|---|---|
| Orpington | 735 | 605 | -130 |
| Nugent Shopping Park | 426 | 517 | +91 |
| Bromley | 45 | 38 | -7 |
| Croydon | 33 | 30 | -3 |
| Sidcup | 1,685 | 1,395 | -290 |
| Sevenoaks | 776 | 654 | -122 |
| Bluewater | 9 | 10 | +1 |
| Dartford | 389 | 289 | -100 |

*Source: CACI Retail Footprint (2012 and 2015)*

The retail rankings show a substantial decline in Orpington town centre's status and performance since 2012 – from 605 to 735. This reflects both a lack of inward investment (i.e. new retail development and/or retailer representation) over this period and the relative improvement of similarly-ranked centres across the UK and, importantly, centres that compete with Orpington for retailers and shoppers. To this end, Nugent Shopping Park has risen in the retail ranking since 2012 – from 517 to

[2] 'Ensuring the vitality of town centres' section.
[3] Namely the LDC Gap Analysis (January 2017) and Footfall Counts.

426. Most other surrounding/ competing centres, including Bromley, have seen a fall in their relative status and performance.

Characteristic of Orpington town centre's market position is its value (64% of total floorspace) and mainstream (32%) retail offer, the former underlined by recent openings in the town (e.g. B&M, Poundland) as identified by LDC. There are little or no premium/ higher end retailers. This, however, is perhaps unsurprising for a centre of its size and nature; and given the extent of competition from nearby Bluewater and Bromley for example.

## Retail Composition

Orpington town centre has 276 units. Over half of these are occupied by services. Leisure Services (i.e. cafes, restaurants) are particularly dominant, while the high proportion of other services reflects the centre's role serving the day-to-day needs of local residents and passers-by.

Just over a third of retailers in Orpington town centre are national multiples, with some 65% being independents. The national multiples include just 9 of the 29 'major' retailers defined by Experian Goad, as shown in *Figure 2* below, which are key attractors and therefore most likely to improve the attraction of a centre for consumers. These are predominantly focused within Walnuts shopping centre, or along High Street close to the Walnuts – in larger units – while Tesco Extra is located at the southern end of the town centre.

*Figure 2 – Major retailers*

| Mixed goods retailers | Food retailers | Clothing retailers | Other retailers |
|---|---|---|---|
| Argos<br>Boots<br>WH Smith<br>Wilkinson | Tesco (Extra)<br>Sainsbury's | New Look | O2<br>Superdrug |

*Source: Experian Goad Category Report (March 2016)*

There is a notable lack of major comparison goods retailers and no real 'anchor' in this regard. Furthermore, several comparison retail categories (including menswear, womenswear, footwear, sports goods and florists) are currently under-represented.

The town centre has two main foodstores. Beyond these, the convenience retail offer is relatively modest for a centre of its size and nature.

Despite a high number of units being occupied by F&B uses, and the introduction of new such uses alongside the Odeon cinema (e.g. Bella Italia), there is a lack of choice; especially in terms of good quality, family-friendly and evening F&B provision.

## Office Market

Orpington town centre has limited office stock (under 400,000 sq ft). This is a consequence of no new developments for a number of years, in addition to the loss of space under the office to residential permitted development rights (e.g. Berwick House). Despite supply-side pressures, rental levels are low at between £17.50 and £22.50 psf.

Supply is generally restricted to small office space above retail premises. Although there is some availability (including just 10,743 sq ft in Central Court) there have been very few letting transactions in Orpington, indicating that there is low demand.

Given the above, investor demand would likely be for conversion or redevelopment into residential use. The speculative development of substantial office space in Orpington town centre would be

reasonably high risk. It is likely that pre-lettings would be required before schemes are brought forward, and these are likely to be difficult to secure.

The most likely prospects for the delivery of new office space in Orpington would be where such space is ancillary to a principal (e.g. residential) use. As well as boosting supply, this would have the potential to create more vibrant, attractive town centre schemes.

## Accessibility

Orpington has good transport connections, including bus and rail services (PTAL 4) into Central London and surrounding towns. The town centre appears to have ample car parking including on-street (short stay) provision. The main car parks include the Walnuts, Homefield Rise and Tesco Extra.

High Street is very long and linear, and there is currently a lack of clear integration with Walnuts shopping centre. The foregoing results in a weak shopping circuit.

## Qualitative Needs

Based on the healthcheck assessment and our site inspections, and having regard for the market trends highlighted previously, we identify Orpington town centre's main qualitative needs for improvement as follows:

- It generally has a reasonable quality pedestrian environment; however, we consider that the shopping circuit is somewhat incoherent and could be improved in and around the Walnuts.
- There is room for improvement in the town centre's F&B offer; this being increasingly important in terms of enhancing a centre's attractiveness to consumers. We consider that good quality family-friendly and evening F&B provision would help to increase dwell time and support retail within the town centre. There is an opportunity to focus these improvements in and around the square, close to the Odeon cinema.
- There is a qualitative need for modern, larger units to provide attractive space for retailers looking to locate to or re-locate within the town centre.
- There is clear evidence that Orpington town centre is under-represented by certain comparison retail categories. Providing the right conditions for investment – such as high quality public realm, a strong F&B offer and modern, flexible space – will help to address these deficiencies.
- There is scope for a better choice of convenience goods retailers. The strong competition for major comparison goods retailers (as considered below), together with retailers' increasingly selective demand for space, underlines the importance of improving this element of the retail offer.
- The achievement of a distinct, good quality retail and leisure offer is important to help retain and attract as many consumers as possible.

# 4. Benchmarking Orpington

Having provided an overview of the town centre's offer, and its current health and performance, in this section we look to better understand its relative strengths and weaknesses. This is informed by benchmarking Orpington against other centres having regard to Key Performance Indicators (KPIs). These focus on measures that are most relevant in terms of understanding Orpington's competitive position.

The benchmark centres selected can be categorised as shown in *Figure 3* below.

*Figure 3 – Benchmark centres*

| Surrounding/ competing centres | Comparable centres |
|---|---|
| Nugent Shopping Park<br>Bromley<br>Croydon<br>Sidcup<br>Sevenoaks<br>Bluewater<br>Dartford | Eltham, London<br>Altrincham, Greater Manchester |

The surrounding/ competing centres, to varying degrees, operate in the same market as Orpington and compete for the same retailers and thus shoppers.

The comparable centres share similar characteristics in terms of their size, demographic, public transport accessibility and competition; and will assist when identifying realistic opportunities for Orpington town centre. These are:

- Eltham – is classified as a 'Major' centre in the London Plan (like Orpington). It also has similar locational characteristics southeast of Central London and therefore shares many of Orpington's main competitors including Bluewater, Bromley and Nugent Shopping Park.

- Altrincham – has an affluent population, a similar scale of retail floorspace and declining vacancy rates (from 30% in 2010 to just 11.6%) following substantial investment in the town centre's public realm. Like Orpington, Altrincham faces significant competition from nearby centres (e.g. intu Trafford Centre, Manchester city centre).

Our proforma-based analysis of Orpington and the benchmark centres is provided in ***Technical Paper 3***. Given that retail is the main driver of town centre activity, we focus particularly on this sector but also consider other socio-economic factors where relevant.

Our key findings can be summarised as follows:

- Orpington's zero Anchor Store Score corresponds with and contributes to its declining retail ranking. Given that 'anchor stores' help to drive footfall and sustain smaller stores, this is likely to have implications for the town centre's vacancy rate (12%), which is broadly in line with the UK average and higher than many of the benchmark centres.

- Orpington is currently ranked lower than the comparable centres of Eltham and Altrincham, despite the former having substantially less retail floorspace and fewer commercial leisure attractions. Both centres have a stronger comparison retail offer and higher Anchor Store Scores.

- The principal surrounding/ competing centres with a relatively strong and diverse comparison retail offer, together with an attractive commercial leisure offer, include Bluewater and Bromley.

- Orpington benefits from a high proportion of relatively affluent, AB and C1 social grades. However, this population has substantial and growing choice in terms of where to shop. The challenge will be retaining their retail expenditure within the town centre.

- Orpington has a high proportion of home owners (74%). On the face of it, this is a positive. However the town has a particularly high proportion of the retired aged 65 and over, while young adults (aged 15-24) and adults (aged 25-44) are under-represented, pointing to an aging population.

# 5. Orpington SWOT

This section concludes our Stage 1 report with a summary of Orpington town centre's strengths, weaknesses, opportunities and threats in a SWOT framework. This draws on previous analysis and considers the aspects which promote and limit Orpington as a successful centre, along with how it can be more prosperous and competitive in the future.

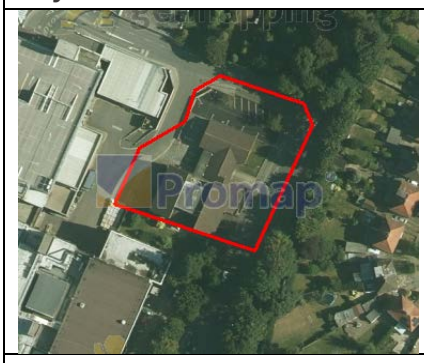
| **Strengths** | **Weaknesses** |
|---|---|
| • The current retail offer meets the day-to-day, convenience-based needs of local residents<br>• The town benefits from the presence of facilities such as the College and the leisure centre that can support retail and other commercial uses<br>• Beneficial recent investment (Odeon, Premier Inn, Berkeley) which has expanded the range of leisure and F&B uses in the town and improved the quality of the environment<br>• A proactive BID with strong membership<br>• Good accessibility and car parking<br>• Improving public realm, helping to set the right conditions for further investment<br>• Affluent and growing catchment population (high proportion of AB and C1 social grades) | • Fall in the retail rankings a sign of under-investment while other centres have improved<br>• Value driven retail offer fails to 'tap into' the affluent population<br>• Lack of larger floorplates to suit modern retailer requirements<br>• Few major retailers to 'anchor' the retail and other commercial uses<br>• Under-represented comparison retail categories with poor choice in (for example) shops selling clothing and footwear<br>• Limited evening economy to the detriment of town centre activity and safety 'after dark'<br>• The long retail pitch (i.e. High Street) contributes towards a weak shopping circuit<br>• The public square is somewhat hidden from and poorly integrated with High Street<br>• Multiple land ownerships in parts of the town centre making development sites challenging to assemble<br>• Weak linkages between the main retail pitch and the leisure centre<br>• Relatively low office rents and demand limiting the prospects for new space |
| **Opportunities** | **Threats** |
| • Potential development sites (leisure centre & day centre) under public sector ownership<br>• Increase the residential population (PRS?) to generate activity and support local businesses<br>• Improve the quality of retail / F&B to help enhance the consumer experience and the town's overall attractiveness<br>• Environmental improvements between public square and High Street to promote a more coherent shopping circuit<br>• BID reballot (if successful)<br>• Improved prospects for office space as part of mixed use developments | • Market uncertainty and the effect on investment decisions<br>• Continued trend of retailer downsizing making it difficult to attract / retain major retailers<br>• The relative improvement of Nugent Shopping Park and other competing centres<br>• BID reballot (if unsuccessful)<br>• Aging population and under-representation of high spending young adults / adults<br>• Office to residential permitted development rights further limiting supply |

# 6. Opportunity Sites

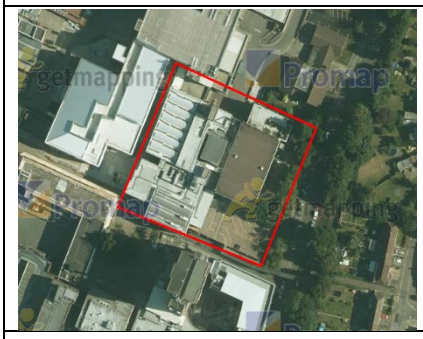
We have identified and agreed with the Council a total of 8 potential development opportunities in Orpington town centre. These are considered in ***Technical Paper 4*** and include:

- Day Centre
- Leisure Centre
- College
- Land rear of Bancroft House
- Royal Mail site and adjacent units
- Units between The Walnuts entrances
- Walnuts Shopping Centre (indoor)
- Library

We have undertaken a proforma-based assessment of each of these sites, considering (inter alia) ownership, planning policy, constraints, potential opportunities and Council action. In summary, the headlines from our research on the opportunity sites are as follows:

| **Day Centre** |
|---|
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>The site is situated close to the town centre's main attractions including Walnuts shopping centre. We consider that the site is most suitable for medium to high density residential uses with associated car parking, a use that would help to increase the catchment population and spend in the town centre. Future redevelopment of the site should not just be considered in isolation but should also take into account Rockspring's emerging thinking for the wider area including the Walnuts Centre and the leisure centre. |
| ***Council Action***<br>Assess relocation options for existing use.<br>Engage with Rockspring regarding potential broader development envelope.<br>Test viability of development options and confirm delivery plan and timing. |

## Leisure Centre



***Potential Use(s) / Improvement Opportunities***

The site represents an opportunity to re-provide the leisure centre (unless an off-site location is preferred) and/or introduce new retail/ F&B uses as part of a comprehensive residential-based scheme (as currently being considered by Rockspring). The additional resident population would serve to increase expenditure and activity in the town centre. It is considered that the site has the potential to accommodate high density development.

***Council Action***

Conclude assessment of options for leisure centre reprovision on or off-site. Whilst this will need to test alternative options against a wide range of criteria, these should include consideration of the potential benefits that a re-provided and improved leisure centre on-site could bring to the regeneration of the town centre as an activity generator and the consequential impact of reproviding the leisure centre off-site.

Test viability of different development options for the site, including as part of a broader redevelopment of this part of the town centre.

Engage with Rockspring regarding the potential development options.

Confirm delivery strategy and timing.

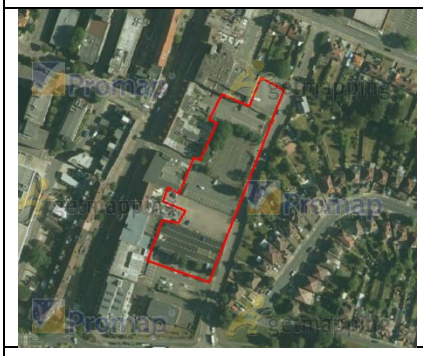
## College

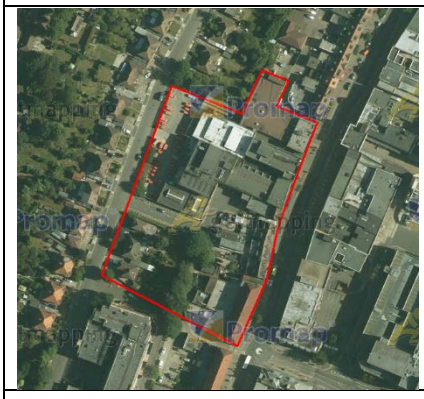
***Potential Use(s) / Improvement Opportunities***

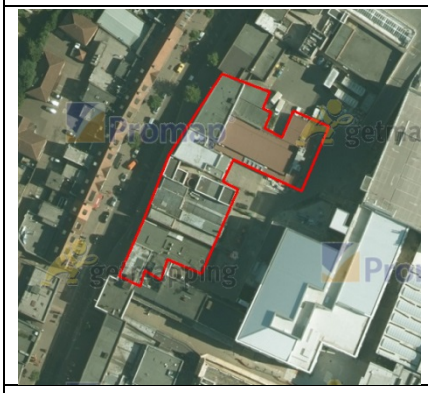
It is understood that the College has an appetite for expansion and there is scope to extend the College into the adjacent car park, creating opportunities for a larger campus and/or complementary uses. These could include flexible enterprise-type office premises or ground floor F&B uses (fronting the public square). The issue of car parking would need to be addressed as part of any redevelopment.

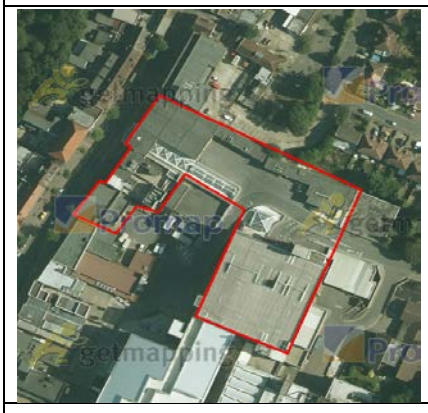
***Council Action***

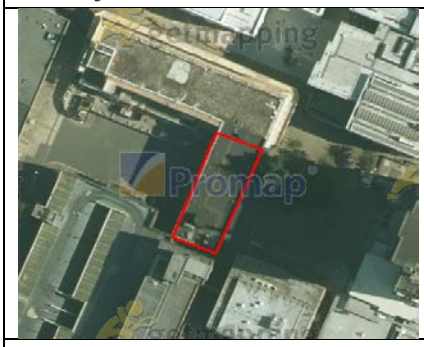
It is understood that the College's lease expires in March 2018 (on the basis that they signed a 25-year lease on 1 April 1993 according to Land Registry). The Council should engage with the College to understand their position and future space requirements in the town centre.

| Land rear of Bancroft House |
|---|
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>A residential-led scheme would be most appropriate, if the site becomes a feasible development opportunity. |
| ***Council Action***<br>Whilst the Council could consider proactive land assembly to deliver a scheme on this site, this could be a time consuming and expensive process. To encourage more effective use of the site the Council could consider developing a planning brief. |

| Royal Mail site and adjacent units |
|---|
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>The site is suitable for retail (and/or F&B) uses fronting High Street, either as existing or as part of a redevelopment scheme.<br>If retained as existing, the upper floors could be better utilised for residential and/or office uses.<br>Residential-based mixed use development, with shop units fronting High Street at ground floor level, would be most appropriate. Given the size of the existing Royal Mail service yard, there is potentially scope to increase the density of development.<br>A more substantial retail scheme could potentially be achieved (most likely) following redevelopment in and around Walnuts. |
| ***Council Action***<br>Monitor the situation with the Post Office lease.<br>Support in principle any change of use (to A3) application at the former Post Office to help strengthen the town centre's F&B offer, whilst also recognising that the premises lack suitability for modern retailer requirements (owing to its 'hard' frontage and internal levels/ configuration).<br>Engage with Royal Mail subject to the outcome of C&W investigations regarding their appetite/ future options for relocation.<br>The redevelopment of the site is considered a longer term option but if sooner, the Council should support in principle a residential-based mixed use scheme (retaining the ground floor for retail purposes). |

| Units between The Walnuts entrances |
|---|
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>The optimum use of this site at ground floor level is clearly for retail purposes; however, there is potentially scope for residential uses at upper floors (if redeveloped) assuming a three storey scheme.<br>If retained as existing, there is scope to improve the frontage in terms of its appearance/ general maintenance (not least to strengthen pedestrian linkages between the north and south entrances to Walnuts shopping centre). |
| ***Council Action***<br>The redevelopment of the site is considered a longer term option but if sooner, the Council should support in principle a retail-led scheme. |

| Walnuts Shopping Centre (indoor) |
|---|
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>Asset management options could include general refurbishment and the diversification of the shopping centre's offer, in order to improve occupancy and activity, whilst maintaining its main shopping function. There may also be scope to amalgamate shop units to provide larger floorplates suitable for modern retailers.<br>If the site does become a feasible development option, it is considered that the site represents an opportunity to re-provide and strengthen the shopping circuit (and its linkages with High Street) as part of a residential-led scheme. This could potentially form part of a more comprehensive redevelopment including the Day Centre and/or Leisure Centre sites. |
| ***Council Action***<br>Engage with Rockspring regarding the comprehensive redevelopment of the site (plus adjacent sites owned by the Council).<br>Identify and test potential development options and financial implications for the Council.<br>Confirm delivery strategy and programme. |

| **Library** |
| --- |
|  |
| ***Potential Use(s) / Improvement Opportunities***<br>The library building appears in good condition. It provides an important civic service and is a destination in its own right, close to the College and the town centre's main retail/ commercial leisure attractions.<br>If the site does become a feasible conversion and/or redevelopment opportunity, it is considered most suitable for ground floor F&B (A3) uses with residential uses above to complement the existing and emerging mix of uses in this part of the town centre. |
| ***Council Action***<br>No action considered necessary, at least until the library use of the building becomes unviable and/or a suitable alternative building is identified elsewhere within the town centre. |

# 7. Next Steps

This report and the supporting Technical Papers provide a baseline position statement of Orpington's current performance and future prospects. To proactively influence future drives of change, we recommend that the Council should work with its partners to develop a comprehensive forward strategy for the town centre, comprising a shared vision, SMART objectives and a prioritised and costed action plan to achieve the objectives, with responsibilities allocated to parties to deliver.

Whilst it will be for the strategy to identify the full range of activities that need to take place, we consider that there are likely to be three key areas within the strategy for the Council to take a lead on. These comprise:

- **Planning strategy** – the Council should develop a clear area-based policy framework to guide future investment and development. For example, this could take the form of an Area Action Plan for the town centre as a whole or development briefs for key opportunity sites (such as those we have considered as part of this report).

- Development opportunities – the Council has a major influence as landowner on two areas that could make significant contributions to improving Orpington's future performance and should take a proactive approach to implementing change:

    - **Leisure Centre and Day Centre sites** – the Council should test alternative locations for the existing uses on these sites and identify potential replacement uses for the sites in terms of their financial viability, return to the Council as landowner and regeneration impact on the town centre. Once a preferred development option has been identified, a preferred delivery route and programme can be designed and implemented.

    - **Walnuts shopping centre** – the Council should continue to liaise with Rockspring regarding the future of the centre and use the findings of this report to inform the optimal future scale and mix of uses. Design options should be tested in terms of financial viability and returns as well as regeneration impact, to inform a future delivery strategy and programme.

    - As part of the further consideration of the above development opportunities, it should be assessed whether it would be practical and beneficial to bring forward the two sites as a single scheme or as separate opportunities.

# Next steps

## Priority actions