Tower Hamlets
Town Centre Strategy
2017 to 2022

March 2017

Contents

1. Town Centre Strategy Executive Summary

This Town Centre Strategy starts to set out a vision for Town Centres in the borough. The emerging vision for the management of town centres is as follows:

> "By 2022 Tower Hamlets will have coordinated, targeted and robust approach to improve the competitiveness and vitality of our town centres as places at the heart of the community, which celebrates our East End heritage, supports local economic growth and enhance the health and well-being of people who live in, work near and visit our borough".

The focus of the Strategy is to attract investment into the borough, to exploit the success of the borough's street markets, supporting enterprise, managing the night time economy, reducing vacant units and impacting on the make-up of the Town Centre in order to improve competitiveness and create healthy, vibrant and sustainable places.

It has been developed by bringing different directorates within the Council together with local residents and businesses to create tailored and focused action plans for each Town Centre that speaks to them and articulates the unique characteristics and qualities of each area. It has been aligned with the work already underway within the Council to develop the new Local Plan (and particularly the work undertaken in the Retail Capacity Study), the emerging Growth Strategy (building on the Enterprise and Employment Strategies), as well as the Health and Well-being Strategy. There is a particular need to ensure that there is a good balance of retail space and to safeguard business space in town centres.

There are major changes underway in Town Centres including comparison shopping leading to changing shopping habits, with more people doing their shopping on-line, which are impacting on the high street. Various reports, including the Portas Review and the Grimsey Review have picked up and made recommendations to support town centres as the heart of local communities and identifying investment aimed at creating vibrant and dynamic places. We have the opportunity to design spaces that are attractive to shoppers as well as health promoting.

The other key change impacting on our high streets is the growing and changing demographics in the borough and the potential for local businesses to diversify to meet these new market needs. Vacancy rates in some town centres are currently at a rate that is lower than the national average, however, attracting new businesses in to fill any empty units will help to improve local economies.

Tower Hamlets is unique in the composition of its retail offer. It contains a large number of independent retailers and relatively fewer high street chains in a number of Town Centres. The independent retail market has been shown to have greater resistance to the major shifts in shopping habits – buying a pint of milk or a loaf of bread on the way home keeps a number of smaller convenience stores in business. However, there is some leakage in areas around the edge of the borough for shopping, e.g. to Westfield Centre in Stratford. Comparison shopping habits are responsible for a reduction in local shopping. New approaches need to be tested to attract local residents to buy local.

The Strategy needs to ensure that while new business is attracted into the borough, the existing business base is supported to develop and grow.

It also houses the key international business location of Canary Wharf. This contains many large and mid-range retailers in its 3 shopping centres. This important and growing centre attracts mainly a weekday working population and is quieter at weekends. There is potential for more arts and cultural events to be organised to draw increased visitor numbers (from the borough, London, nation-wide and tourists into the borough at the weekend and in the evening.

The street markets in the borough attract many visitors, including local, national and international, and enhance the local footfall in many parts of the borough. Many provide an excellent place to purchase healthy and affordable food. There is room for improvement in markets, offering a more diverse offer, exploring new market opportunities, investing in new stalls and attracting new traders.

Key issues for local residents and customers who currently use Town Centres (when they were surveyed as part of developing the evidence base for the Strategy) included cleanliness and refuse collection, anti-social behaviour, accessibility and way-finding. These need to be addressed as we prioritise and identify the funding required delivering the priority areas identified in this Strategy.

The key focus is on 'Major' and 'District Centres' as these are defined in the Local Plan, which is generally referred to as 'Town Centres' in the Strategy.

Brick Lane
Bethnal Green
Bromley-by-Bow
Canary Wharf
Chrisp Street
Crossharbour
Roman Road East
Roman Road West
Whitechapel
Watney Market

Each area has been analysed, working in partnership with the Association of Town and City Management (ATCM) and the Retail Group. This has provided some recommendations around short and medium term milestones to improve the performance and health of the Town Centres. A ranking has been undertaken of the current state of health of District Centres and this current benchmark is included in the strategy. It is intended that funded proposals will be rolled out as part of bespoke, locally agreed Action Plans in 7 of the 10 areas identified.

Work will continue in areas such as Crossharbour (as the new development proposals take shape there), Chrisp Street (around consideration of the planning application from Poplar HARCA), Bromley-by-Bow (with the development of the East London Fashion Cluster and on Fish Island) and Canary Wharf around the newly emerging developments e.g. Wood Wharf. The Aldgate area is starting to emerge as a potential new Town Centre and it, in turn, will be encompassed by the Strategy as priorities start to come forward e.g. around Petticoat Lane and way-finding from Tower of London into the borough.

This Strategy aims to provide a framework for bespoke and tailored activities designed to work around the unique characteristics of the borough's current and emerging Town Centres.

2. Proposed Strategy for Town Centres

Introduction

This section of the Town Centre Strategy draws on findings and research carried out by consultants, the Association of Town and City Management (ATCM) and the Retail Group and by a range of teams across the Council, to identify priorities and inform the approach to managing town centres.

Each town centre is distinct in its makeup, offer, characteristics and role in the local community and the wider area. Despite the differences between centres, there are a number of themes, issues and improvement opportunities shared by centres.

The work undertaken to date has identified a number of key actions that could be carried out. However, it is worth emphasising that, at this point, it is not anticipated that the Council will be able to implement all of the actions identified. With the current financial constraints placed on Local Authorities, it requires the support and participation of a variety of stakeholders to prioritise and oversee delivery of a range of activities and actions in each town centre. Where there are existing local partnerships these will be tasked with undertaking this work. For areas without such partnerships, work will be undertaken to create new partnerships or bring existing ones together by working with Neighbourhood Forums, Area Panels and other existing groups.

Individual Action Plans have been developed setting out tailored actions by working with local stakeholders and businesses, aimed at improving the performance and competitiveness of each town centre.

The role of the Council in delivering the Town Centre Strategy is seen as:

- To activate
- To facilitate
- To stimulate
- To educate

There are actions in the strategy that the Council could **activate** through existing approved funding streams including the Thriving High Streets programme, Regenerating Brick Lane project and collaboratively across the Council's approved funded programmes of activity.

There are actions the Council could **facilitate**, by helping stakeholders to implement, assisting in planning or supporting delivery. The creation of local partnerships will aid in the identification of prioritised, joint working activities.

There are actions where the Council could **stimulate** third parties to act, invest and participate, including stimulating inward investment into the borough.

Finally, the Council has a role to **educate**, making sure that people understand what works across a range of areas including health and well-being, and in developing its evidence base for other objectives eg. improving footfall

The Town Centre Strategy has key thematic strands including:

- Improve the management of Town Centre;
- Attract investment;
- Exploit the success of street markets;
- Support enterprise;
- Manage the evening economy
- Improving health and well-being

Strategic Mission

1. To create places that are at the heart of the community, celebrate local heritage and improve health and well- being. We will improve the attractiveness, appeal and ease of use to make each of our Town Centres more in tune with the shopping and leisure needs of local residents and other visiting consumers. Our aim is to maximise the potential performance and competitiveness of our business operators and create economic growth in Tower Hamlets.

2. To achieve this Strategic Mission, the following work-streams will be taken forward:

   (I) Improve the existing retail offer;
   (ii) Develop management and leadership opportunities;
   (iii) Implement place marketing and promotion to generate footfall; and support inward investment;
   (iv) Improve facilities, public realm and litter management;
   (v) Improve operation and sustainability of street markets;
   (vi) Reduce anti-social behaviour in the Town Centre;
   (vii) Review performance of town centres and track performance.

(I) Improve the existing retail offer

Vacancies in Town Centres are low, shop units are small and, generally, would not meet the needs of some national multiple operator and most businesses that were surveyed have indicated that they are ‘doing OK’. This suggests that, unless there are major redevelopment proposals under development (such as those anticipated at Crossharbour and Chrisp Street) there is limited scope to implement large-scale changes in the offer and mix. This is particularly relevant where the Council is not the landlord and property owner.

There is an existing commitment in the Local Plan to promote a diverse offer and to decline applications for additional hot food takeaways in areas close to schools. It is proposed that work should be undertaken to attract new businesses into the Town Centres to enhance the offer where needed.

There are examples of good retailers across the borough offering high standards of retail display and customer service across town centres. This category would also include health promoting with a range of healthy choices and supporting the local community.

However, this is not always the case. Many retailers and market traders would benefit from improving standards in areas such as:

- presentation;
- shop window displays;
- layout and merchandising;
- customer service;
- social media;
- marketing skills;
- understanding the local market and changing demographics;
- diversifying the offer to promote healthy eating.

There is potential for retailers to be encouraged to participate in Council sponsored campaigns such as Buy well, Food for Health Awards, Best Bar None.

This would apply to retailers including catering, service, convenience and comparison shops.

There are opportunities to improve and manage the existing and emerging night time economy in Brick Lane, Whitechapel and Bethnal Green and work with local business and residential communities to develop and grow it in Roman Road East and Chrisp Street.

With the number of vacant units and the natural churn in the business offer in Town Centres, it is possible to attract new businesses in to achieve diversification ambitions. The majority of centres currently appeal to a local resident and/or worker customer base and some benefit from visitors based on their reputation or their anchor offers. In most cases the business growth opportunity in the town centres is to offer more choice and range in the offer in e.g. convenience, service.

There is potential to undertake more inward investment activity – aimed at encouraging new businesses into the borough. At the current time, new businesses taking on vacant units in Town Centres are the result of the work of property agents or the operator’s own initiative. Marketing and promotions campaigns alongside offers such as business rate relief or introductory rent reductions would help to attract new business in.

The Council currently holds a range of information about each town centre. It is proposed that these could be used to create 'Key Fact Packs' to help attract new operators and investment. These could be shared with local landlords, developers, agents and local businesses looking to invest in centres.

(ii) Develop Management and Leadership Opportunities

Chrisp Street, Bethnal Green and Roman Road East are town centres with local partnerships and organisations leading engagement with retailers, market traders and residents. The Council will work with PoplarHARCA in Chrisp Street, Oxford House in Bethnal Green and Roman Road Trust in Roman Road to improve local town centre management practices, enhance local employment opportunities and support delivery of regeneration initiatives.

The Council has been delivering a Town Centre management role in Roman Road for the last 3 years. It recently appointed a Town Centre Manager for Brick Lane who will lead the development of a town centre partnership to support delivery of a regeneration programme in the area.

Working with these partner organisations can provide support with implementing: place marketing and promoting and events to help generate footfall, wider business and community engagement activities to supporting consultation on public realm and other regeneration proposals and promoting participation among businesses and market traders in business support programmes.

The Council will develop a town centre partnership in Roman Road East, Whitechapel and Watney Market and will work with PoplarHARCA to support the development engagement activities linked to the regeneration of the Chrisp Street town centre.

(iii) Drive additional footfall by stimulating innovative promotions, events and use of social media

Where events and promotions have been delivered in town centres, footfall has increased and consumers, retailers and market traders have reacted positively e.g. Roman Road Festival, Brick Lane Festival, Mela.

The Council will work with stakeholders with an interest in town centres to plan events and place promotion activities to generate footfall on high streets.
Local partnerships and stakeholders will be encouraged to lead these place promotion activities.

The Council will develop and deliver social media, retail marketing, events and promotion training to enable local groups and partnerships to gain skills in these areas.

(iv) Improve facilities, public realm, litter management and cleanliness

All town centres, with the exception of Crossharbour and Canary Wharf, appear to be experiencing litter management issues and standards of cleanliness could be improved. They may benefit from a review of collection times, particularly when markets are trading and around fruit and vegetable traders. These conditions could result in poor initial impressions among visitors to these centres.

There are opportunities to improve the public realm in town centres including: better facilities, road surfaces, clean pavements, up to date information boards, way-findings and seating. This could include providing shade and shelter, access to drinking water, public toilets or community toilet schemes.

Improvements to way-finding and signage highlight key components of the centre, retail and non-retail anchors, public facilities and community spaces could provide a simple way of creating a stronger local feel. These are physical signs in centre and link to online place promotion activity. There are also considerations around how people travel to town centres. Linkages need to be made to the Council's strategies on air quality, physical activity and health and well-being. This would suggest that people should be encouraged to travel to town centres by walking, cycling or public transport. Way finding making use of green grid routes and providing 'time in minutes to' on the signage would be useful. Consideration is also needed around cycle storage in and around town centres.

These improvements will require support from cross borough services areas including Street Markets, Public Realm, Highways that can incorporate them in future works and maintenance plans.

(v) Improve operation and sustainability of street markets

There is a significant opportunity to improve the management of the borough's markets, particularly in attracting new traders and improving operating standards.

A more proactive and targeted approach to improving and developing markets in needed including: a campaign to generate new traders, improved market layout, and trader standards, better stalls and facilities and visiting markets and events.

Some of these actions are detailed in the Market Business Plan and Business Improvement and Investment Plans (BIIPs).

The Markets Team will use the town centre ‘Key Fact Packs’ to promote available market stalls. In Brick Lane and Whitechapel there is potential to extend the markets and with additional traders provide better choice and variety of goods
.
Improved markets will benefit each town centre and add to the overall offer and help create a stronger sense of place. Extending some of the markets could generate additional revenue and lead to increased enterprise activity and create employment.

Street markets offer a clear benefit to health by providing access to fresh fruit and vegetables and the Council is keen to encourage the continuation of markets in the borough. Some Market traders accept ‘Healthy Start Vouchers’ which parents on low income receive to buy fruit and vegetables with, however further promotion of this sort of activity could bring additional customers to the markets

(vi) Reduce Anti-Social Behaviour in the Town Centre

All centres, excluding Crossharbour and Canary Wharf, suffer from varying degrees of anti-social behaviour (ASB).

This anti-social behaviour includes incidences of street drinking, low level drug taking and tagging and graffiti and an under reporting of crime across all centres.

There is a need to promote responsible alcohol consumption, (both for health and anti-social behaviour reasons) particularly in areas where there is a lively night time economy. This is linked to the issue of alcohol licencing and cumulative impact zones. If there was an appetite in local town centres it would be possible to consider smoke-free town centres.

ASB issues are being discussed at a local level in response to local concerns about local problems. Police and street management should review the installation and monitoring of CCTV facilities. Late night cleaning and additional cleaning should be considered as part of managing the night time economy and funding identified to help to raise perceptions of the local area.

Improved litter and waste management would have an impact on the perceived levels of anti-social behaviour even if litter is not, by itself, considered ASB. The management and policing of school pupils and groups of youths gathering in town centres is one aspect to consider in certain locations.

(vii) Review performance of town centres and track performance.

Area Profiles have been produced that provide a ranking of all town centres against the 20 performance indicators used by the Association of Town Centre Management (ATCM) have been prepared for Tower Hamlets 9 town centres.

Action Plans which have now been drafted would address any weaknesses identified in the performance indicators in each town centre.

The High Street and Town Centres Team will review the performance indicators each year and provide evidence to track and monitoring improvements between 2017 and 2022.

3. Why are Town Centres important?

In 2012, the Council's Enterprise Strategy proposed that:

- *Enterprise creates opportunities for employment*
  ***Our research suggests**: Many people are employed locally in Town Centres in the borough, but the numbers could be higher*

- *Enterprise is a means for residents to create wealth*
  ***Our research suggests:** Retailers and market traders look to the Town Centres for their incomes, but many are struggling currently to stay in profit*

- *Enterprise fuels local economic activity*
  ***Our research suggests**: Vibrant Town Centres, as can be seen at Canary Wharf or Brick Lane on a Sunday, attract business and footfall*

- *Enterprise improves the local economy*
  ***Our research suggests**: Capturing local spending power will enhance local economies across the borough*

The enterprise economy is, therefore, in many ways, the borough's most significant strength and its growth has brought rapid and permanent change to the face of the borough, physically, economically and socially.

In addition to this enterprise focus, Town Centres offer much more – they are an opportunity for people to come together, feel part of a community, reduce loneliness and isolation plus provide the opportunity for people to access resources locally which they can do by walking / cycling thereby preventing the need to travel by car which has negative health impacts on physical activity and air quality

The Town Centre Strategy aims to build on these strengths and opportunities and enhance its effect in order to create a framework for managing Town Centres in the borough to:

- Attract investment
- Exploit the success of street markets
- Support enterprise
- Manage the night time economy
- Reduce vacant units
- Impact on the make-up of Town Centre
- Improves health and well-being

Tower Hamlets has experienced rapid economic growth in recent decades and there are over 200,000 jobs within the borough (5% of London's employment).

While Tower Hamlets' population has expanded rapidly, by 45,000 since 2001, employment growth has outpaced that of this growing population. There are almost

3 jobs for every 2 working age residents in the borough, although a lot of these jobs are taken by people who live outside the borough. People living in Tower Hamlets are starting businesses. The borough has the seventh highest number of business births within London and the tenth highest number of business deaths (which is consistent with the London average). Despite this entrepreneurial spirit, the levels of self-employment are lower than the London average and it tends to be those with higher level skills that move into self-employment. This suggests that opportunities should be exploited in local town centres to encourage entrepreneurs to set up business locally – in a vacant unit or on a market stall – and help to revitalise the local offer.

The majority of town centres e.g. Watney Market, Bethnal Green, Roman Road East and West, Chrisp Street and Whitechapel, currently serve the needs of their local communities. This needs to be maintained, while also identifying and servicing the needs of new communities.

Brick Lane attracts a large number of visitors, so is seen as a national and international destination. It is continuing to prosper and many of the incoming businesses are independent retailers rather than chains. The changes are impacting on the traditional offer of Brick Lane (it is no longer Curry Mile). Offering support to traditional businesses, alongside working with the new businesses is the key to maintaining a diverse offer. Finding tailor-made and locally determined solutions to these new issues and challenges is the key focus of this Strategy.

Town Centres in the borough, therefore, perform an important economic role within the borough. They support those around them by providing a significant level of employment (21,000 jobs according to the Local Economic Assessment), including entry level jobs. They are home to many long-standing and well-loved street markets, which attract people into the area. However, they rely on the economic spending power of their local communities to maintain their vibrancy and competitiveness. As the current and future demographic changes take place, the requirements of the new communities need to be encompassed if this new spending power is to be retained in the local economy.

Evidence in the Local Economic Assessment refresh (2016) demonstrates that there is a variation in performance between the borough's town centres. Further evidence of this has now been gathered as the ranking of the performance of town centres shows. This has been developed applying the Association of Town and City Management's indicators of a successful town centre to the Council's 9 District Centres (see Appendix 2).

Town centres are vital in making opportunities in the local enterprise economy accessible to local people. But while Canary Wharf is home to the UK's second largest business district as well as a major shopping centre other town centres in the borough face particular challenges. Improving the performance of the borough's town centres has the potential to retain more spending locally, support a more diverse economy in Tower Hamlets and increase the number and range of jobs available to local residents.

4. Strategic and local context

The Town Centre Strategy fits within the context of the vision for 'A Prosperous Community' as set out in the Council's Community Plan 2015 to 2020.

'Tower Hamlets will be a place where everyone regardless of their background and circumstances has the aspiration and opportunity to achieve their full potential through education and vibrant local enterprise'.

The Plan recognises that Tower Hamlets is a 'community of communities' and that a 'one size fits all' approach is not one that works in the borough. It does, however, reflect the aspiration of 'One Tower Hamlets' which is about reducing inequality and poverty, strengthening cohesion, ensuring that communities live well together and recognises that the whole community has a part to play in making this a reality. The Town Centre Strategy aims to embed these key principles in its approach to developing a framework that is tailored to the needs of the 9 District Centres in the borough, which have been identified as the key 'Town Centres' for this Strategy. However, it is an approach that would be equally applicable to Neighbourhood Centres and any newly emerging District Centres in the borough.

The Community Plan highlights vibrant Town Centre as a key priority raising concerns regarding access to Town Centre, service provision and issues of social cohesion. The Council in its Scrutiny review of Town Centre undertaken in 2015 looked at the challenges facing Town Centre to understand how to ensure that they retained their vibrancy, competitiveness and strengths, while respecting their different roles. While most areas appear to be in reasonable health, they are facing a range of complex challenges, including competition from the growth of on-line shopping, changes in the local population profile and the need to adapt to the changing needs and expectations of their customers.

The Vision for Tower Hamlets Town Centres in the Community Plan has been identified as:

'By 2025 Tower Hamlets will be refocusing on its Town Centres, ensuring they are places at the heart of civic life, which are vibrant, inclusive and accessible. The role of each town centre will differ, in order to serve all members of the community, according to character and function. Each of the Town Centre will form part of a rejuvenated, interconnected network of hubs for shopping, leisure, civic and associated housing uses'.

This Town Centre Strategy has been written to complement other Council strategies including the Enterprise Strategy 2012, the emerging Local Plan scheduled for adoption in 2018, the emerging Growth Strategy, the Tower Hamlets Spatial Strategy 2016 and the Health and Well-being Strategy. It uses as an evidence base the Retail Capacity Study 2016, undertaken by Carter Jonas, the Area Profiles developed for the borough's District Centres and footfall counts, resident and business surveys undertaken by the Town Centre team.

The purpose of the Town Centre Strategy is to assist in achieving the Council's vision. The strategy will set out the overall approach to managing the Town Centre to reduce vacancies, attract investment, exploit success of street markets, support enterprise, enhance the makeup of the high street and effectively manage the evening economy.

With this in mind, the London Borough of Tower Hamlets contracted with the Association of Town and City Management (ATCM) and its' partners, The Retail Group, to produce a Town Centre Strategy and make recommendations for The Council's District Centres as part of the overall Town Centre Strategy. The aim is for the Strategy to be a framework for the type of activity required to achieve the objectives set, which is also applicable to Neighbourhood Centres.

The aim is for the Strategy and its' recommendations is to propose how town centres could be improved to unlock their retail potential and remain competitive, as well as to satisfy more of the retail needs and requirements of existing and new local consumers. These recommendations will be specific, measurable, achievable, realistic and time-framed and they will also be funded via an approved funding stream.

5. Local Planning Policy Context

The emerging draft Tower Hamlets Local Plan due to be adopted in 2018 contains a number of key local and evidence documents that are relevant to the Town Centre Strategy. The Core Strategy 2010 proposes the concept of 'reinventing the hamlets'. The places which make Tower Hamlets unique would be strengthened and enhance the borough's importance as a unique part of inner London, assisting London to become a successful and sustainable city. The following aims are included in the Local Plan and incorporated into the proposals of the Town Centre Strategy:

- maintaining and increasing the supply of town centre activity;
- increasing the availability of larger retail floor space;
- keeping existing levels of local retail provision providing basic goods and services;,
- encouraging street markets and promoting their role as 'drivers of local enterprise and character';
- promoting active lifestyles.

Our Borough, Our Plan – A New Local Plan First Steps (2015) indicated that betting shops, payday loan shops and hot food takeaways might be restricted and diversity increased in Town Centre.

Tackling the Takeaways: A New Policy to Address Fast-Food Outlets in Tower Hamlets (2011) sought to support opportunities for healthy lifestyles through planning. Tower Hamlets was awarded 'Healthy Town' status in 2008 and received associated government funding until early 2011 to enable the borough to tackle health inequalities. The report identified that there were around 200 hot food takeaways across the borough with a particularly high concentration of this use along the main thoroughfares including Bethnal Green Road, Whitechapel Road and Roman Road.

The Town Centre Spatial Strategy to 2025 set out an overall vision for Tower Hamlets that refocuses on Town Centre. It establishes 4 overarching aims to consider:

- Planning Town Centre
- Designing Town Centre
- Managing Town Centre
- Connecting Town Centre

A spatial vision alongside strategic aims and a delivery framework were developed for the main centres in the borough.

The planning policy context is to maintain and enhance the vitality and viability of Town Centre. It promotes new sustainable development and economic growth. The

Strategy builds off this policy context, aiming to enhance footfall, increase competitiveness and develop a local partnership focus within each town centre in the borough.

6. Our Changing Town Centres

5.1 Maintaining the vitality and viability of town centres

A number of high profile research reports have been commissioned over recent years that set out recommendations and guidance on how to maintain and enhance the future vitality and viability of the UK's Town Centres. These include:

The **Portas Review** (2011) reported on the findings and recommendations of research led by Mary Portas into the future of the High Streets. The report presented 28 key recommendations for government, local authorities and businesses to help high streets respond to the current challenges facing them and to prevent further decline. The Council received £100,000 of funding and participated as a 'Portas pilot'. This included healthy eating pilot in Chrisp Street and development of the Roman Road Trust model.

The **Grimsey Review** (2013) addressed the continuing decline of many local high streets. The review highlighted the dramatic impact that recent technological changes have had on consumer behaviour and the knock-on effects for high streets. It suggests that the Portas recommendations failed to adequately account for this.

The **Distressed Town Centre Property Taskforce** (DTCP) report (November 2013) was produced by an industry-led cross sector taskforce. This was assembled in response to the Portas Review. The report focuses on the role that property ownership, investment, development and occupation have on town centre viability, and provides recommendations on how the property sector can act to attract inward investment for Town Centre support their ongoing viability.

Key recommendations from these studies identify:

1. **Need to reform the management of Town Centre** and develop strategies to deliver change that respects their particular strengths. Suggestions included developing town teams and Business Improvement Districts (BID's).

2. **Support for local (street) markets** is also increasing, as a way to increase footfall, provide access to healthy food and enhance the vibrancy of local centres.

3. **Making use of the planning system** to protect and enhance Town Centre, which is reflected in the Council's Local Plan.

4. **LPAs are also being encouraged to make use of CPOs** in order to address issues of fragmented ownership and to facilitate comprehensive development across a centre.

5. **Engaging communities** to encourage them to support their local high streets and Town Centre. This is really key in terms of maintaining local facilities and improving health and well-being. It also applies conversely to engaging businesses with their communities so that they can 'give back' to the

community as well. Local partnerships will be developed to enable this 2 way communication to take place.

Recent strategies to promote community participation in the development of local centres have included government support for communities wishing to take on the responsibility for ownership and management of assets of community value, such as their local pub or shop. A £19 million fund has been set up and more than 300 assets have already been listed under the Community Right to Bid.

6. **Leveraging investment and funding.** There are a number of new sources of public sector investment now available to facilitate improvements to local centres. These include £3.6m of funding via the Town Teams, a High Street Innovation Fund worth £10m and High Street renewal awards to date worth £1m.

7. **Adapting to take on the threat from increasing internet sales.** Recent research has highlighted the importance of recognising the threat from increasing internet retailing as an important trend that will continue over the short term. Some centres are adapting better than others for example, the incorporation of Click and Collect (delivery and returns) points into centres.

8. **Air quality, physical activity and health and well-being considerations.** Cycling, public transport and walking will be encouraged. Disabled parking will always need to be provided but, in accordance with the Council's strategic direction, car parking will not be prioritised in this Strategy.

9. **Town Centre focusing on their role as community hubs** is a recommendation of the Grimsey Review, where retail is just one element, creating a diverse offer which will help local centres to compete more effectively with online retailers.

One of the greatest challenges facing Tower Hamlets will be how to revitalise the fortunes of its small and medium sized centres without a critical mass of retail, leisure and other uses in order for them to compete for more limited investment and development potential.

5.2 Changing shopping habits

From the mid-1990's there was an unprecedented period of growth in consumer spending, which came to a dramatic end with the downturn in the economy in 2007. Business and consumer confidence was weakened by cuts in public sector funding, rising VAT, unemployment increasing, control of consumer credit and the cost of living increases. This resulted in people spending less and retailers seeing their profits reducing.

Forecasts for 2016 on, however, are starting to show small levels of growth and some positive signs of improvement in consumer confidence. These levels are still slower than previously experienced. The UK economy is affected by fluctuations in Eurozone and global economies and the longer term effects of leaving the European Union ('Brexit') are still unknown.

There has been an increase in the use of internet, mail order, telephone and door-to-door selling. These forms of selling equate to around 13.4% in 2015 of the market share (up from 5.6% in 2006) and equate to sales of £50bn. The significant growth has been in internet shopping. This is adversely affecting the high street particularly in terms of electrical goods, books, music and travel. Other areas that may be affected include clothing and footwear. Forecasts suggest that the non-store retailing activity will continue to grow rapidly outpacing traditional forms of spending. This will be sustained by new technology e.g. smart phones and the development of inactive TV shopping. There are predictions that this may slow after 2020. However, 70% of all convenience goods are still sourced through local shops and distribution warehouses. The drive for internet sales is also fuelling the growth of collection points for these goods e.g. click and collect facilities in accessible places or showrooms where customers can view and test items. This may help to support the demand for retail space over time.

5.3 Changing needs

The population of the borough has been changing rapidly, spurred on by the dynamic growth of Canary Wharf, with the current population estimated to be around 272,000 people. Population growth from 2001 to 2010 has averaged around 4,500 additional people per annum, although the borough has generally been a net exporter of population to the rest of the UK, with people coming in from international sources on top of the natural demographic increases driving population growth. The borough's role as one of London's 'receiving areas' for in-migrants from outside the capital continue. The borough has the fourth highest level of population turnover – after the City, Newham and Brent. It particularly draws in under 30's and exports those aged 30 to 45, mainly due to the lack of family accommodation in the borough.

The borough is still a deprived borough, but one with an oasis of wealth within it. It has proportionately more people earning less than £20,000 per annum that the Greater London or Inner London averages, lower proportions of those earning £30,000 to £85,000 and significantly more people earning over £85,000 than the Greater London average. A complicated relationship exists between those who live in the newer housing in the borough who tend to look outwards to meet their retail and leisure needs and poorer households with more limited housing choices looking inward. The retail offer in the borough has traditionally serviced the needs of the more local communities in areas such as Whitechapel or Watney Market. They are not established to meet the changing demands and needs of the newcomers.

House prices are higher in the borough than in East London overall. Rents are also increasing rapidly as the demand for rented accommodation rises. The income ratio of the borough is 6.6 to 1, but based on a mean income of £39.000 (skewed by the high wages of a minority). The largest group of residents is in the £15,000 to £20,000 bracket.

Consultation undertaken in developing the Local Plan has suggested some improvements to the management and look of the Council's Town Centres and street markets. The following suggestions have been noted:

- Enhancement of the borough's Town Centres
- The status of Town Centres and shopping parades should be reviewed
- Specific markets in the borough require improvement
- Local shops, markets and public houses should be protected
- Independent shops and restaurants should be prioritised over chains
- A wide range of uses in Town Centres should be encouraged
- Concern about too many hot food takeaways in the borough
- Restriction wanted on new betting offices and pay-day loan shops
- Request that more affordable workspace and retail units are provided
- Concern was raised about proliferations of estate agencies in some locations.

Town centres have seen many changes due to the reasons already identified in this Strategy – changing consumer habits and the growth of internet shopping being just two of them. Town centres are more likely to be used as places for leisure, entertainment and hospitality rather than just for shopping. These complimentary uses need to be protected to make sure that town centres are places that people continue to want to go to and spend their money in.

7. Key objectives

In reviewing the strategic context and the Council's existing and emerging planning framework together with the findings from a number of research studies and the practical application of town management processes in the borough, the following have been identified as the key objectives of the Town Centre Strategy 2017 to 2022:

- Attract inward investment into the borough
- Develop local partnerships
- Establish effective governance and management
- Deliver public realm and shop front improvements
- Improve sustainability of street markets
- Deliver business advice and support
- Deliver place promotion and marketing

The Strategy aims, therefore, to develop proposals and a direction of travel for its town centres that: puts in place the Council's approach to town centre management, in order to:

- Encourage diversity of uses in town centres
- Reduce vacancies
- Exploit the success of street markets
- Support enterprise
- Manage the evening economy.
- Influence the make-up of the high street

The Strategy has reviewed the following in order to achieve the broad scope envisaged for the study:

- Assessing opportunities to attract more customers, as well as improve the experience of existing shoppers;
- Identifying recommendations to improve the customer experience, environment, signage, welcome and civic pride;
- Identifying core strengths of the centres to assist proactive marketing;
- Providing reasons to trade in the centres, in order to attract new retailers and investment, reduce vacancies, increase employment, support enterprise and encourage start-ups;
- Identifying opportunities to improve the Street Markets' offer;
- Assessing opportunities to improve the leisure and evening uses and the Night Time Economy of the centres;
- Identifying how the management of the centres can be improve

8. Methodology used to develop the Strategy

The Strategy provides the context, findings and analysis to set the overall strategy and direction for managing town centres, as well as a range of actions aimed at:

- Improving performance,
- Increasing competitiveness,
- Enhancing customer appeal and
- Developing community engagement for each centre.

The methodology used for gathering data and opinion, key findings and sets out the collective of findings for the district centres is identified below.
The development of the Town Centre Strategy is based on a wide variety of research topics and the following core work streams:

- Desk-based review of relevant key documents;
- Analysis of existing data and information;
- Discussion with a cross-section of officers from different departments;
- Engagement and discussions with local community groups in centres;
- Engagement with Market Services Team and Business Improvement and investment Plans (BIIPs) and the emerging Markets Business Plan;
- Review of available consumer surveys from Council capacity retail studies and other studies where available;
- Review of the emerging and developing Area Profile Reports;
- Review of retail trends information;
- Surveys of businesses and where markets are located market traders
- District centre location reviews / site visits conducted in all centres.

As can be seen from the list of work stream areas completed as part of the project, the Town Centre Strategy is based on a wide and robust range of inputs.

The Council's project team has been able to provide a wealth of information drawn from many other associated projects, this has helped both in the development of the Town Centre Strategy and also ensured that the strategy is aligned with other initiatives where possible and practical. In addition, the ATCM and The Retail Group has completed essential additional work streams to provide a 'complete' basis for the development of the Town Centre Strategy.
The outline methodology for the additional work streams has been set out below.

8.1 Location Reviews

Location reviews were completed for all 9 District Centres. This work included a review of the wider retail offer (including service, convenience, comparison and catering offers) as well as the street markets.
The review looked in detail at 14 different variables and included statistical input and the centre boundary plans contained within the Retail Capacity Study (Carter Jonas research). The review also assessed the markets offer using a further 7 variables.

The aim of the location review is to assess the overall offer, trading appeal, health and vitality, role and function of the local centres from the perspective of experienced town centre consultants and the perspective of the consumer.
The detailed findings of the location reviews are set out in section xx and were instrumental in developing the District Centre Action Plan

8.2 Operator Surveys

In each centre, a survey of local businesses was completed, both those operating in physical premises and as market traders. The survey questionnaire was developed specifically for the study. It covered a variety of topics including customer behaviour, customer usage patterns, current performance indicators, views and issues with the centre and improvement requirements.
Surveys were hand delivered to a cross-section of businesses and market traders and the anonymously completed questionnaires were collected later the same day.
The survey achieved a good response across the centres, although actual response levels varied by centre and by number of available businesses. Across the various centres, the survey achieved the participation of around 400 businesses with over 700 businesses offered the opportunity to take part. The survey questionnaire used is attached to the report in Appendix 3.

8.3 Local Stakeholder Group Discussions

Meetings were held with the following stakeholder groups that engage with businesses in their district centre:

- Oxford House for Bethnal Green;
- PoplarHARCA for Chrisp Street;
- Roman Road Trust for Roman Road East.

The purpose of the local stakeholder group discussions was to include the experience and insight of existing local groups and to also draw on any additional research they may have developed.

8.4 London Borough of Tower Hamlets Officer Engagement

Officers from a range of service areas took part discussions to support the development of the town centre strategy including: Community Cohesion, Environmental Health, Public Health, Infrastructure Development, Enterprise team, Whitechapel Vision team, Safer Neighbourhoods, Licensing, Planning, Housing, Parking, Highways and Market Services.
The aim of the officer engagement was two-fold; on the ‘input’ side it has been essential to identify what initiatives are already underway in Town Centre, we have also been able to identify any specific issues and requirements the various officers and departments would like to see in the Town Centre Strategy.

With regard to the ‘output / deliverables’ side of the engagement with officers, the aim has been to identify how various departments would be able to assist in the implementation of actions to improve town centre performance. This was particularly important in the current period of budget savings and reduced public funding. Through this awareness of the Town Centre Strategy content, different departments have been able to identify opportunities to highlight and support the inclusion and potential implementation of relevant planned expenditure improvement actions.

8.5 Retail and Consumer Trends Review

A summary of recent trends has been completed to provide an overview of the current, dominant trends affecting the retail sector and Town Centre. An extensive review of published research, reports, articles and insight from industry leaders has been undertaken. This broad research approach has enabled us to collate the views of a wide audience from industry leading bodies such as the ATCM, British Council of Shopping Centres and Institute of Place Management; to research and insight specialists including Deloitte and Dunnhumby; to retail property and planning specialists, government bodies and other industry specialists.

8.6 Area Profiles and Other Key Documents Review

The emerging Area Profile Reports have been drawn on for a variety of inputs to the analysis to develop the Town Centre Strategy. Particular areas of information have been catchment area, customer profiles, regeneration activity, food hygiene ratings and other local statistics.

Other documents have also been reviewed including; Market Business Improvement and Investment Plans and the Carter Jonas Retail Capacity Studies. The Council project team has also provided a wealth of documents to be included in the available research database.

9. Outputs and Deliverables

The findings of research work streams were used to develop two core outputs. The first of which is this Town Centre Strategy with its findings and key recommendation for each District Centre (see xxx). This draws on all the findings, research and Action Plan content to develop the Town Centre Strategy Report. The Town Centre Strategy Report provides a summary of the findings and conclusions for each centre, it then identifies the common themes and issues, which have been used to identify the key strategic initiatives that need to be completed in order to help London Borough of Tower Hamlets Council to achieve its strategic vision for London Borough of Tower Hamlets' town centres.

The second is the production of the individual Town Centre Action Plans. These have been produced for the following areas:

- Whitechapel
- Brick Lane
- Bethnal Green
- Roman Road East
- Chrisp Street
- Canary Wharf (in development)
- Watney Market
- Roman Road West
- Crossharbour*
- Bromley-by-Bow*

Bromley-by-Bow and Crossharbour have Retail Opportunity Statements instead of Action Plans as they are too small in terms of offer and overall size to produce a full Action Plan. This will be reviewed as further developments take place in these areas.

The Action Plans for 8 District Centre is available separately to the Town Centre Strategy and will be reviewed with local partnerships. They each contain research sections as follows:

- Location Review; retail and market offers
- Operator Survey
- Consumer Insight
- Consumer Profile / Demographics
- Regeneration Activity
- Retail and Consumer Trends
- Conclusions and Improvement Opportunities.

They conclude with location specific actions, these are grouped under 7 headings:

- Improvements to the Retail Offer
- Improvements to the Market
- Improvements to Consumer Experience
- Improvements to Marketing and Promotion
- Improvements to the Evening Economy
- Improvements to the Management of Area
- Improvements to Business Support

10. Street Markets – Moving Streets Ahead

10.1 Introduction

The markets and street trading strategy sits alongside and works to support the Town Centre Strategy, ensuring we have a joined-up and successful approach for both of these inter-reliant areas of business.

As London has been transformed over the last fifteen years, so have the town centres within it. These centres have changed in the way they look, the purpose they serve, the types of shops they have and the way they are accessed and used. However today's London town centres continue to have a vital role to play in people's quality of life.

The London Borough of Tower Hamlets boasts some of the most iconic and internationally renowned street markets in London. No other borough in London offers year round trading with such a choice of vibrant and contrasting markets.

With a justifiably proud history and tradition on many of the boroughs markets, they contribute significantly to the vitality of local economies, and harvesting a more positive commercial cohesion between retailers and traders will positively impact town centres and establish local enterprise hotspots.

As the city fringe activity area impacts our borough and the population increases and diversifies, both the existing and next generation of market trader have a unique opportunity to embrace this change, harnessing the strong local economy and utilising today's technology to capitalise and flourish.

Tower Hamlets Council is keen to continue its investment and support of its street markets. The purpose of this Markets and Street Trading section is to actively plan for growth and manage change in the borough's street markets.

The Markets and Street Trading section charts the way Tower Hamlets aim to reinvigorate, develop and transform existing street markets within the borough, whilst creating new markets and opportunities to significantly contribute to regeneration, social cohesion and entrepreneurial activity for our community and visitors.

Markets and street trading contribute positively to the economic and social wellbeing of the community providing access to affordable quality goods and compliment mainstream retailing. They provide local employment and support local enterprise and provide a stepping stone for small businesses to enhance and grow their business.

Tower Hamlets contains eight main local-authority managed street markets located in neighbourhood and district centres across the borough.
The performance of the borough's street markets varies. Tower Hamlets contains some of London's most vibrant and successful street markets. However some of the markets have suffered from changes in retail patterns and are in decline with fewer customers and dwindling numbers of traders.

We recognise the important role that our mission, vision and strategy will play in their continued success, and will use a range of key performance indicators to monitor and evaluate their performance. The table below shows current performance as it has been assessed in preparing this Strategy:

Table 1: Summary of street market performance review (prepared by ATCM/ the Retail Group for the purposes of this Strategy)

	Whitechapel	**Brick Lane (including Sclater Street and Cheshire Street**	**Bethnal Green**	**Roman Road East**	**Chrisp Street**	**Watney Market**	**Roman Road West**	**Crossharbour**	**Bromley-by-bow**
Market offer needs to be curated	✓		✓	✓	✓	✓	✓	n/a	n/a
Trader standards are poor	✓	✓	✓	✓		✓	✓	n/a	n/a
Space for additional market stalls		✓	✓	✓	✓	✓	✓	n/a	n/a
Market layout needs improving			✓					n/a	n/a
Opportunity to expand market	✓	✓						n/a	n/a

10.2 The Market Common Action Themes

The table above has identified a number of common issues and findings for markets in the town centres, including:

- There is significant scope to increase and improve the Council run markets.
- Most of the markets would benefit from additional new traders, more variety and higher standards of retail professionalism, improved equipment and stalls.
- Brick Lane and Whitechapel Town Centre could sustain bigger markets.
- Support needs to be provided to Market Services as they implement layout changes.
- Introduce visiting markets and events to expand the offer and to provide additional reasons to visit.

This section seeks to establish a framework for delivering a prosperous network of markets, both supporting successful markets as well as intervening to improve those which are performing less well or where there is an uncertain future.
We will work with traders to ensure they operate effectively so that we can continue to development the markets, modernising trading practices and taking advantage of all new business opportunities. We want our traders to run their businesses to the

highest standards, be more competitive and offer increasing more quality choice so that markets play a bigger part in the regeneration of the borough.

Drawing on the experience of both the private and public sectors, key areas of Market Services will be reviewed in line with the Council's strategic objectives, including financial and management arrangements, governance, regulation and town centre promotion.

10.3 Our Changing Borough

The estimated resident population of Tower Hamlets is 272,000. In recent years, the borough has seen the highest population growth in the country.
Tower Hamlets remains a relatively young borough, with almost half of the recent population rise concentrated in the 25-34 age range.
The profile of local residents is becoming increasing diverse, with 43% of residents born outside the UK, 32% from Bangladeshi and 31% White British communities, and an increasing number from other ethnic groups including Somali community.

The Market Services team manage, licence, develop and support independent street trading locations and opportunities within the borough. By moving away from being just custodians to business curators of street markets, the team will reinvigorate and transform entrepreneurial trading activity. Their approach to market management is as an investment for the future, not solely a regulatory one. This forward thinking strategic direction should progress into activity, delivering enterprising markets for the wider economic benefit to local business and communities.

10.4 Outcomes

The purpose of the Markets Strategy is to deliver the following outcomes:

- Each market will have a resident led vision;
- Each market will be able to assess and champion its contribution to town centre life, safeguarding sustainability;
- Our markets will be an integral part of town centre plans, strategies and vision
- We will establish positive dialogue between retailers and traders;
- We will pro-actively embrace the changing retail environment, utilizing digital technology, identifying new locations and opening times;
- Users of our markets will feel welcomed, safe, accommodated and valued;
- We will ensure that the markets offer is based on the changing needs of our diverse local communities.

10.5 Doing things differently

We will move beyond custodianship of markets by becoming active curators by:

- regularly evaluating commercial business plans for each market, with Key Performance Indicators, including economic, social and environmental;

- develop a comprehensive understanding of the customer base and regularly monitor financial performance of each market;
- develop skills of Market Services to administer, manage and develop markets;
- review licence conditions to support business and economic development.

10.6 Next Generation Market Trader

Mentor and financially enable new start-ups and diversifications on retail markets;

- Regularly evaluate the offer on each market and opportunities for new traders;
- Create a business support package for new entrants and existing traders with: business advice, technology and business planning;
- Work with colleges, universities and Workpath providers to identify and support young entrepreneurs for career options linked to street markets;
- Develop closer co-operative working with local partnerships;
- Undertake skills audits to identify opportunities of development, in order to sustain and grow their business;
- Embrace new technology to future-proof and capitalize on new customers – cashless payment systems, e-commerce, Wi-Fi, social media and marketing.
- Connect with government/other grants for training and business support.

10.7 Governance and Legislation

- Explore trader associations and privately managed market opportunities;
- Implement enforcement policy with a focus on sub-letting breaches;
- Develop culture of partnership working with the Markets Service.

10.8 Business aims and objectives

There are ambitious plans for the future of the service. It is recognized that the service is delivering in a resource constrained world. The market business is adapting to these challenges, nurturing resources and communities they depend on.

10.9 Brand management and marketing:

- ICT upgraded with on-line functionality in 2017;
- New dedicated markets website;
- Establish a clear street market identity and business direction;
- Utilise social media, area Wi-Fi___33, market branding and marketing.

10.10 Iconic location and venue development

- Clear signage between markets to encourage visitor movement between them
- Attractive street-scene and waste management, assess cleaning contract in terms of service and cost;
- Actively promote a recognized retail and market trader relationship;

- Provide entertainment where appropriate, utilizing controlled busker zones and performers for specific festivals.

10.11 Delivering solutions

- To adopt a business-led, proactive care driven management approach to markets management;
- Pro-actively promote new trader and specialist market incentives;
- Actively develop cost reduction programme in conjunction with integration of new business software and systems;
- Improve and expand street markets as funding allows, through customer, trader support and trust consultation;
- Originate new street markets;
- Developing street market infrastructure;
- Consistent approach to enforcing market regulations to improve standards.

10.12 Developing specialist skills

- Develop trader recruitment and trader development programmes;
- Establish clear governance of street markets;
- Provide foundations to establish on-going specialist, seasonal and sponsored festival markets e.g. Farmers, Vintage, Art, Ramadan, Christmas.

10.13 Financial strength

- Investment across all existing markets;
- Individual business investment plans for each street market, creating independent financial cost centres;
- Critically assessing fees and charges of market services, establish mechanisms for annual review and action;
- Identify financial growth opportunities i.e. footway licences, advertising and sponsorship;
- Nurture business and funding partnerships, i.e. town centres, sponsorship, advertising, trusts, City of London;
- Trader arrears to be reduced with IT support system in place. Incentives to be created for early payment systems;
- Deliver revenue generating electric supply for all traders;
- Engage with traders, local businesses, residents, town centre and market visitors to identify business needs, desires and aspirations for street markets;
- Constantly benchmark and compare street markets across the UK for examples of good practice and new business ideas.

10.14 Major goals

The following key targets will be achieved by Market Services over the next 5 years:

- An integrated ICT market management system with mobile working capacity;
- Prepare and cost business investment plans for each street market;
- To establish a unique Market Service identity;
- To develop an active social networking communications tool;
- To have a dedicated website and uniformly branded markets;
- Increase income, generate surplus finance to enable market reinvestment
- To have full occupancy of current markets;
- To establish 3 new markets;
- Create sustainable, on-going seasonal and specialist street market events;
- To brand new regenerated flagship markets offering at Whitechapel.

11. Reviewing Canary Wharf

Canary Wharf is a major town centre situated in the south east of the borough on the Isle of Dogs. It emerged out of the redevelopment of 97 acres of previously derelict dockland. It has now become one of the world's most sought after office and retail space. It is home to a working population of 112,000 people, many of whom travel into the centre on a daily basis. It contains 37 office buildings and, in its 3 shopping centres, houses over 300 shops, cafes, restaurants and bars. Canary Wharf Group (alongside its development and central business services functions) has responsibility for managing the estate, including traffic management, security, health and safety, business continuity, facilities management, public spaces and landscaping, arts and events and the East Wintergarden venue.

Canary Wharf is currently designated as a Major District Centre. There is consideration of a potential re-designation as a Metropolitan Centre. This has been raised in the London Plan and is supported by the emerging evidence base for the Local Plan.

Canary Wharf has a global role as a competitive financial district and is one of the only two financial districts in London. In a Tower Hamlets context, it is, alongside Aldgate and the City Fringe, a centre for business tourism and inward investment. It is the largest town centre in the borough and a key employment location. . It has a large amount of office use, but also provides a varied offer of retail, including high street branded stores, convenience and leisure. This is a modern centre unique to the borough – including a large number of tall buildings.

The residential population of Canary Wharf is small, but is increasing in size with new developments currently underway. This town centre does, however, see the greatest footfall and trade from a weekday working population, rather than the broader Tower Hamlets population.

There are a number of key development opportunities in Canary Wharf including Wood Wharf, Riverside South and Crossrail. Proposals coming forward will provide mixed use developments, large floor plate offices, and residential development.

The Council's Core Strategy indicates that Canary Wharf should retain and enhance the global role as a competitive financial district, but it should also adopt a stronger local function.

Canary Wharf has a higher than average level of restaurants and cafes, a strong representation of High Street retailers and mid-range multi nationals. It currently lacks a department store. It has a low level of convenience stores compared to the national average. It also has below average levels of hair and beauty stores.

Vacancy rates are significantly below the borough average (0.60%), providing the lowest vacancy rates of all district and neighbourhood centres. There is a churn on the occupants of Canary Wharf's retail units, but generally units are not vacant for any significant period of time.

Canary Wharf has excellent transport links and is served by the Jubilee Line, DLR and bus links. The largest concentrations of pedestrians are around the stations and in the 3 major shopping centres contained within Canary Wharf.

The centre has a high environmental quality in its distinct and unique style of modern architecture. The draft Local Plan suggests that way finding is an issue to be addressed to and between Canary Wharf's internal shopping centres, which are mainly underground. There are a number of public open spaces, including Jubilee Park, Cabot Square and the new rooftop garden on Crossrail Place.

Surveys of users of the town centre have identified that those using it like its proximity to home, the good range of non-food shops and the attractiveness of the centre's environment. They would like to see more high street shops and more markets and events.

Key weaknesses that have been identified with regard to Canary Wharf include:

The linkages to surrounding residential areas are poor. Aspen Way acts as a barrier to Poplar. It is proposed that major development proposals should address this issue to encourage pedestrian access into Canary Wharf.

Canary Wharf is mainly an office location so it is busy during the week and quieter at weekends. It performs differently to other town centres in the borough. It is proposed that events and activities should be developed to attract more weekend use.

There are fewer independent retailers in Canary Wharf than in the rest of the borough.

A map showing the extent of Canary Wharf Town Centre is included at Appendix 2.

12. Summary Findings and Common Themes

This section of the Town Centre Strategy sets out findings from a review of the performance of the borough's town centres and highlights opportunities for improvements under the following five topics:

1. Retail Offer
2. The Market
3. Environment and Consumer Experience
4. Marketing and Place Promotion
5. Evening Economy
6. Management and
7. Business Support.

1. Retail Offer - findings and opportunities for improvement

Table 2: Retail offer findings and opportunities
(prepared by ATCM/the Retail Group for the purposes of this report)

	Finding and Issues	Whitechapel	Brick Lane	Bethnal Green	Roman Road East	Chrisp Street	Watney Market	Roman Road West	Crossharbour	Bromley-by-bow
Retail Offer	Poor standards of shop fronts signage/ visual display in shops	✓	✓	✓	✓	✓	✓	✓	✓	
	Dominated by small shop units	✓			✓	✓	✓	✓	✓	
	High % of <3* food hygiene rating	✓	✓	✓	✓	✓	✓	✓		
	Active night time economy	✓	✓	✓	✓		✓	✓		
	High number of vacant units		✓		✓	✓		✓		
	High convenience /service provision	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Dominated by independents	✓	✓		✓	✓	✓	✓		

Review of Whitechapel Retail Offer:

There are 122 businesses in the Whitechapel District Centre, of which 15 (12%) sell convenience goods, 37 (30.33%) comparison goods, 9 (7.38%) general retail, 14 (11.48%) finance and 36 (29.51%) leisure businesses. There were 8 vacant units in June 2016, 6.75% of all units compared to 11.17% UK average.

The percentage of Whitechapel's comparison retail provision in the centre is below the UK average (32.43%), with 40% of the 37 businesses selling women's and men's fashion and accessories and other goods sold including: books, hardware and household goods, sports and camping goods and

electronic goods. The JD Sports shop is the only national clothing retailer in the centre.
Most of these businesses are smaller independents and sell goods that target a mainly Asian customer-base, including from outside the area.

Whitechapel’s convenience provision is 12.30% compares to a UK average of 8.42%, with a Sainsbury’s superstore as the main convenience goods outlet in the centre with about 4,800sqm of floor space.

Sainsbury’s plans for a new store are under consideration with a total of 5,766sqm net, along with smaller ancillary retail units and 600 new residential units above the store, as well as new Town Square.

The centre has some smaller convenience stores with Budgens and specialist independent stores (bakers, confectioners, delicatessen and general convenience stores) providing for the day–to-day needs of the local resident population as well as those working in and visiting the centre.

The 9 retail services providers are dry cleaners, health and beauty outlets, opticians, a post office and travel agents.

Whitechapel’s leisure offer is 29.51% of business units, compared to a UK average of 22.7%, and includes amusement arcades and bookmakers.
There are 41 businesses with <3* Food Hygiene rating, which is a weakness given the scale of the local evening economy and high footfall in the area.

The provision of financial and professional services is just above the UK average with 8 retail banks and estate agent businesses.

Consultation with businesses in 2016 highlighted that 72% of market traders said trading was down on last year compared to 55% of retailers, and 10% of market traders saying trade was up compared to 15% of retailers.

Footfall in Whitechapel is high throughout the day, particularly at peak commuting times, with local footfall generators: Whitechapel Station, Royal London Hospital, Queen Mary University, Whitechapel Market and the IDEA Store with 600,000 visitors per year (2015/16) and Whitechapel Gallery with 450,000 visitors per vear. There are also office blocks nearby and the centres.

Since 2011, 1,383 new housing units were built within 800 metres of Whitechapel District Centre and there is a further 3,614 units being developed on 8 sites. The largest local developments are Bishopsgate Goods Yard with 1,356 units, Raven Row with 625 units and the proposed redevelopment of the Sainsbury store with 559 new units.

Other regeneration programmes include: the Crossrail development which is expected to result in 50-60% increase in passengers, Queen Mary University

expansion plans, the Council's new Civic Centre on Whitechapel Road and new hotels and office space in nearby Aldgate.
These developments will increase footfall in the already busy area and create business opportunities throughout the day for local shop and market traders.

Review of Brick Lane retail offer:

There are 339 businesses in Brick Lane District Centre of which 32 (9.44%) sell convenience goods, 96 (28.32%) comparison goods, 25 (7.37%) are retailers, 77 cafes and restaurants (22.7%), 22 (6.49%) Finance and Professional, 7 (2.06%) Drinking Establishments, 6 (1.77%) hot food takeaway businesses and 40 (11.80%) are other retail businesses and 34 (10.03%) vacant units.

Although the percentage of comparison retailers in Brick Lane is below the UK average of 32.21%, the offer is more varied and distinct compared to other district centres and attracts a wide range of people to Brick Lane.

Most of the comparison retail units sell fashion goods with: 9 retailers selling leather and vintage goods, 7 art galleries, 3 record shops and 4 textile shops. The majority of the comparison uses are located along Brick Lane with some located in secondary streets. There are no national multiples on Brick Lane.

Brick Lane's percentage of convenience retailers compares to a UK average of 8.51%, with most independent convenience stores and confectionary stores, including those targeting Bangladeshi community. Similarly to the comparison goods, there are no national multiples and there is no large supermarket as the unit size is only suitable for top-up shopping.

Retail service provision is lower than the UK average of 14.30%, with 60% health and beauty outlets and travel agents, wedding services and an optician. Brick Lane has 77 café and restaurants, particularly from Hanbury Street to Fashion Street.

Although Brick Lane has been known for its curry houses, the eating out offer is diversifying to include other cuisines, adding variety to this destination. There is a low provision of hot food takeaways and only 2 public houses and 6 bars on Brick Lane. Most licensed premises on Brick Lane are restaurants. There are 40 businesses on Brick Lane with a Food Hygiene rating of <3.

The Old Truman Brewery acts as a hub for indoor and outdoor events in Brick Lane, many of which concentrate on arts, fashion and other creative fields, and has spaces for hire for Exhibitions and Trade Shows. There are development plans in the centre including Old Truman Brewery.

Other uses on Brick Lane include B1 offices, B8 stores, a school, bowling alley, betting office and health centre. These uses suggest that Brick Lane is catering for local residents in terms of civic and community uses.

Brick Lane is a very busy weekend, weekday evenings and Sunday daytime destination, with the highest footfall on the northern half of the street. Within 800metres around the district centre, the 2011 census shows 46,030 people living in 18,440 households, making it the 4th most densely populated of Tower Hamlet's 9 town centres.

Between 2011 and 2015, housing growth figures show 1,193 new units were built in 5 sites within 800 metres of Brick Lane; the largest was a 360 unit development located by Bethnal Green Road, and a further 4,643 housing units are planned in 11 sites.

There are plans for the development of hotels, offices and retail space in the Aldgate area, which together with transport improvements and new residents moving into the area, will grow the potential customer-base and in-turn create business opportunities for local enterprises.

Review of Bethnal Green retail offer:

The Carter Jonas Retail Capacity Study in 2016 identified 156 retail units in Bethnal Green District Centre: 17 (10.9%) selling convenience goods, 46 (29.49%) comparison goods, 22 (14.1%) retailers, 9 (5.77%) cafes and restaurants, 17 (10.90%) finance and Professional, 8 (5.13%) drinking establishments, 8 (5.13%) hot food and takeaway, 26 (16.67%) other and 3 vacant (1.92%).

The percentage of comparison businesses in Bethnal Green compares to a national average of 32.21% with a small number of national multiple within the centre and most of the fashion offer in shops focusing on sari and other fabrics. National multiples in Bethnal Green are: Iceland, Boots, Tesco's, Sainsbury's, Greggs, Nandi's, KFC, McDonalds and Subway.

The percentage of convenience retailers is 10.90% compared to 8.51% UK average. The Retail businesses include health and beauty, optician and dry cleaners, 17 financial and professional services, with 10 units occupied by estate agents.

There are 26 businesses in the category 'other' with 23.08 % D1 (non-residential institutions), a dental surgery, place of worship, community centre and GP surgery and 6 betting shops and a laundrette in the centre.
There are 9 restaurant and cafés, 8 drinking establishments and 8 hot food takeaways. There are 10 businesses with <3* Food Hygiene rating, which is better than other centres.

New housing developments within 800 metres of Bethnal Green in the past 5 years created 912 new units, with a further 2,369 units at planning approval and development phase, which will generate more customers for local businesses.

The district centres proximity to Queen Mary University on Mile End Road and the Children's Museum near Bethnal Green tube station, which has seen increases in visitor numbers from 433,261 in 2012/13 to 462,607 in 2015/16, offers opportunities for attracting more student tenants and visitors to Bethnal Green District Centre.

The Market, local public houses, Bethnal Green Library and national retailers in this shopping street are generators of footfall during the day. Bethnal Green Tube station generates high footfall in the early morning and evening throughout the town centre, however many businesses are closed at these times.

Review of Roman Road East retail offer:

There are 248 businesses located in Roman Road East District Centre, 29 (11.69%) sell convenience goods, 54 (21.77%) comparison goods, 32 (12.9%) retailers services, 22 (8.87%) cafes and restaurants, 15 (6.05%) hot food and takeaway, 3 (1.21%) drinking establishments, 23 (9.27%) finance and professional services and 40 (16.13%) are other businesses. There were 14 vacant units (5.6%) in late 2016.

The percentage of comparison business in Roman Road East District Centre is below the UK average of 32.21% and is mainly independent businesses. The percentage of convenience retailers is higher than the UK average of 8.51% and includes national multiples: Percy Ingle, Iceland, Greggs, Spar, Tesco Metro, Pound land and Superdrug.

Over half of the retail services businesses are in health and beauty. There is also a dry cleaners and photography studio. The financial and professional service businesses compare to 10.74% UK average, with 10 units occupied by estate agents.

The businesses in the category 'other' include: a dental surgery, place of worship, community centre, a GP surgery, 4 betting shops and a laundrette, a Post Office and the Idea Store.

The Idea Store Bow, which had 265,427 visitors per year (2015/16), along with the Council's John Onslow House and the Market attract people into the town centre.

There are 14 businesses with a Food Hygiene rating of <3 stars with: 8 retail businesses, 2 distributions (wholesale) businesses and 4 cafes and restaurants.

Many of the shops, particularly independents, have poor quality window and interior displays and shop signs that appear to be too big for the size of facia.

Shop unit sizes are typically small i.e. under 100 square metres, while multiple retailers typically target a minimum of 150 to 200 square metres of trading area for new stores. The offer is dominated by independents with man shop fronts in poor condition.

The 2011 census shows that, within 800 metres around the district centre, 44,977 people living in 17,000 households. Since 2011 there have been 1,462 new housing units completed in 7 sites within the 800 metre catchment of Roman Road District Centre, with 208 units completed on the Tesco Metro site in the town centre. There are a further 252 new housing sites in St Clements Hospital and 2 further sites due for development in the next few years.

Review of Chrisp Street retail offer:

There are149 businesses in Chrisp Street comprising: 21 (14.09%) selling convenience goods, 27 (18.12%) comparison goods, 24 (16.11%) retailer services, 12 (8.05%) cafes and restaurants, 7 (4.70%) finance and professional services, 3 (2.01%) drinking establishments, 31 (20.81%) other and 14 (9.40%) hot food and takeaway businesses. In July 2016 there were 10 (6.7%) vacant units in Chrisp Street, compared with a UK average of 11.17%.

The comparison retailer provision is significantly below the UK average of 32.21%, with comparison businesses in Chrisp Street includes: a florists, household goods, clothing, furniture, chemists and jewellers. The centre has an above average provision of convenience goods at 14.1% compared to 8.51% as the UK average, with national multiple retailers including: the Co-op, Boots, Shoe Zone, Percy Ingle and Greggs.

Retail service businesses include: health and beauty, an opticians and dry cleaners. Financial and professional service is significantly below the 10.74% UK average.

The category of 'other' includes D1 (non-residential institutions) with a dental surgery, place of worship, community centre and GP surgery.

There are 12 restaurants and cafés in the centre is close to the UK average of 8.70%. The provision of hot food takeaways is higher than the 5.66% UK average. There are 14 businesses have <3* Food Hygiene Rating.

Chrisp Street Exchange was set-up in 2016, which is run by London Small Business Centre to support businesses start up and growth

Chrisp Street centre appeals to a local consumer base that walk to the centre on a frequent basis to buy day-to-day retail goods and services. Chrisp Street Idea Store had 370,883 per year in 2015/16 and the Market is generators of footfall into the centre.

In a survey carried out by consultants in October 2016 46% of businesses reported turnover was down, 38% said it was the same and 16% said it was up compared to the previous trading year.

Since 2011 there have been 3,231 new housing units within the 800 metre catchment of Chrisp Street District Centre, with the largest completing 570 new housing units, with a further 11,188 new housing units within this area including 3,200 in the Isle of Dogs.

PoplarHARCA in partnership with the London College of Fashion secured £1,779,250 from the LEP, adding to £2,130,456 match funding, to convert 81 underused garages and surrounding land into a new fashion hub and help provide skills and training in the local community. PoplarHARCA has submitted its major redevelopment proposals for consideration. If approved, the proposed redevelopment over the next 8 years will transform this centre and address weaknesses in its offer. Consideration will need to be given to supporting the existing businesses and market traders in the lead up to and during the redevelopment, to ensure that they are able to continue to trade.

Review of Watney Market retail offer:

Watney Market District Centre has 115 businesses: 36 (31.30%) comparison, 26 (22.61%) convenience businesses, 8 (6.96%) retail services, 7 (6.09%) cafes and restaurants and 2 (1.74%) finance and professional, 2 drinking establishments, 10 (8.70%) hot food and takeaway businesses and 15 (13.34%)) other businesses. In July 2016 there were 9 vacant units, 8% compared to a UK average of 11.17%.

Businesses on the Commercial Road side of Watney Market include: retailers selling day-to-day goods and clothing targeting local customers. The units at the southern end on Chapman Street (in the 'Arches') are typically large semi-wholesale food and convenience operators.

Anchor stores include: Iceland and Peacocks, located on the central pedestrianized area of Watney Market, with two rows of shops face each other and the market runs along the centre.

Businesses sell: school wear, hardware, convenience goods including Asian supermarket, bakery, pharmacy and a variety of service providers.
The quality and prices are low and mainly target a local low income customer base.

In the market about 60% of stalls sell: clothing followed by fruit and vegetables, household, jewellery, rugs and luggage.

The southern-side of the District Centre takes in a stretch of Chapman Street from and includes units in the railway archways with wholesale and convenience goods.

There are mainly independent retailers in the shops around the market, with products sold in both shops and market stalls aimed at mainly Bangladeshi customers including traditional clothing, food stuffs and some household goods. While Peacocks is the only multiple comparison retailer and Iceland, Tesco Metro and Sainsbury Local are the only multiple convenience stores. There is a Santander bank on Watney Street and a Lloyds bank on Commercial Road.

Restaurants in the area include: Efes and Lahore Kebab on Commercial Street and a Wimpy franchise in the market and other hot food and takeaway businesses.

In Watney Market there are 33 businesses with <3* Food Hygiene rating: 16 are cafes and restaurants, 10 are retailers and 4 in distribution/transport.

The Watney Market Idea Store had 348,723 visitors in 2015/16 and along with local Shadwell DLR and Overland Stations; the market and anchor convenience stores attract visitors to the centre.

The area around Watney Market saw 786 new housing units completed between 2011-2015, with a further 4,934 new units planned, including 1,800 in the London Dock development.

The London Dock development includes plans to open-up the dock wall and make connections to Watney Market District Centre and could generate potential customers for Watney Market.

Two thirds of businesses surveyed in late 2016 reported declining turnover trends, with 25% reporting an increase on their last financial year.

Review of Roman Road West retail offer:

There are 121 businesses located on Roman Road West, 12 (9.92%) sell convenience goods, 24 (19.83%) comparison goods, 13 (10.74%) retailers, 9 (7.44%) are cafes and restaurants, 12 (9.92%) finance and 2 (1.65%) drinking establishments, 8 (6.61%) hot food and takeaway and 21 (17.36%) are other businesses. In July 2016 there were 20 (16.53%) vacant units in the town centre, which is higher than the national average of 11.17%.

Roman Road West has an above average provision of convenience goods at 9.92% compared to 8.51% as the UK average, and includes four national multiple retailers: Simply Fresh, Nisa Local and Greggs located around Roman Road Market Square, and a Co-op store located on the corner of Globe Road to the west of the centre.

Nisa Local has the largest floor space with 220 square metres of all the convenience stores. There also independent convenience specialists: 2 butchers and other shops that attract customers from outside the area with a grocers, delicatessen and bakery. There are no national multiple food or beverage operators located in the town centre.

Roman Road West's comparison retail offer at 19.83% is significantly below the national average of 32.21%. There are no comparison multiples within the centre. Although the high number of specialist independent retailers reflects the traditional nature of the centre, attracting high street brands to the centre would help to complement the independent offer and compete with neighbouring centres.

There is a range of comparison goods stores located in the centre including a florists, household goods, clothing, furniture, chemists and jewellers.
On the western side of the district centre there are independent retail and services units along only the northern side of the road with residential properties opposite.

Along with convenience and comparison provision, Roman Road West's retail service offer is at 10.74% compared to the UK average of 14.30% UK average. Over 60% of units are health and beauty businesses and an optician and dry cleaner. There are 12 financial and professional service businesses, 9.92% compared to a UK average of 10.74%. There are also 10 units occupied by estate agents.

There are 21 businesses in the category of 'other' with 28.10% having D1 (non-residential institutions) classification, including a dental surgery, place of worship, community centre and GP surgery.
There are also two betting offices and a laundrette situated in the centre.

Restaurant and cafés are 7.44% of units compared to UK average of 8.70% and hot food takeaways at 6.61% compared to a UK average of 5.66%, with 7 businesses have <3* Food Hygiene Rating. There are only two drinking establishments in the centre.

Roman Road West District Centre is located to the east of Bethnal Green Underground Station, and as such is only a short walk from Bethnal Green District.

Over half of the businesses in the town centre that completed a survey reported that trade is level or up on their previous financial year; whilst 40% report it is down on their previous year. Average daily transactions are either high or very low.

There is a good selection of convenience stores, service providers and daytime catering operators, which would indicate reasonable footfall levels, although footfall was visibly low during the visit outside of school exit time

Since 2011 there have been new housing sites within the 800 metre catchment of Roman Road West District Centre, with the largest completing 450 new housing units by 2015 at Suttons Wharf North to the east of Meath Gardens and overlooking Regents Canal and 106 units on Parmiter Street north of the centre. There are other sites which are potential housing sites including the London Chest Hospital

Review of Crossharbour retail offer:

There are 17 businesses in Crossharbour District Centre with: 3 (17.65%) Comparison, 2 (11.76%) convenience, 3 (17.65%) retail services, 1 (5.88%) financial and professional services, 2 (11.76%) restaurants and cafes, 1 (5.88%) drinking establishments 2 (11.76%) hot food takeaways and 3 (17.65%) other businesses. There is one vacant unit in Crossharbour District Centre.

The main part of the centre is located between Crossharbour DLR Station and Millwall Inner Dock with a parade of mainly small shops located under residential housing blocks and including: 2 restaurants, 2 cafes and 2 pizza outlets, a hairdresser, florist and a tanning booth and convenience goods, including a Tesco Express small food store and a pub and dry cleaning outlet. This part of the centre targets mainly local residents and workers for their day to day basic food and catering needs and tends to be busiest during lunchtimes.

On the south east of the parade is a large Asda supermarket, with a petrol filling station and a pharmacy. This is clearly a popular supermarket with a large busy car park that attracts customers from outside the area and Isle of Dogs.

A footfall study carried out in October 2016 on a weekday and a Saturday showed the number of pedestrians using the centre was 68.8% lower passing the DLR station and 11.1% lower at Seldon Way compared to the same locations on the weekday. The numbers exclude those parking in the Asda car park.

Since 2011 there have been 119 new units new housing completed within the 800 metre of Crossharbour District Centre. There are also 16 development sites around Crossharbour centre which will create an additional 10,906 housing units.

In addition the owners of the Asda store are proposing to develop the site and have indicated that this will include housing, a larger store with car parking and a range of additional facilities and services that could support a larger resident population in the area.

A review of Crossharbour's future development is needed given its population growth as the current town centre offer is unlikely to meet its future requirements. This will be considered during consideration of the planning application and a local partnership will be brought together to shape up future priorities for the area.

Review of Bromley-by-Bow retail offer:

There are 5 businesses in Bromley-by-Bow District Centre including: a large Tesco Superstore to the east of the A12 and a small Sainsbury Local convenience store to the west by the Underground station.

The Tesco store has a large car park and offers additional in-store facilities with: a filling station, café, pharmacy and deli, fish and butchery counters, with customers drawn from both the local community and a wider area as a result of its location, access via the A12 and parking capacity. The J. Sainsbury Local store has a local customer base.

Given the lack of typical town centre uses and components, Bromley by Bow does not currently fulfil the role of a District Centre.

2. Review of Street Markets in Town Centres:

Table 3: Review of Street Markets
(prepared by ATCM/the Retail Group for the purposes of this Strategy)

	Finding and Issues	**Whitechapel**	**Brick Lane**	**Bethnal Green**	**Roman Road East**	**Chrisp Street**	**Watney Market**	**Roman Road West**	**Crossharbour**	**Bromley-by-bow**
Markets	High vacancies rates in market		✓	✓	✓	✓	✓	✓	n/a	n/a
	View of retail offer blocked by market	✓	✓	✓	✓		✓		n/a	n/a
	Need to curate the market offer	✓	✓	✓	✓	✓	✓	✓	n/a	n/a
	Poor quality canopies/frames	✓	✓	✓	✓	✓	✓	✓	n/a	n/a

Review of Whitechapel Market

Whitechapel Market has capacity for 116 stalls operating Monday-Wednesday and Saturdays from 07.00 to 18.00, has an occupancy rate of close to 100%, the highest of 9 street markets managed by Tower Hamlets Council.
Whitechapel market traders sell: fruit and vegetables, Asian clothing and accessories and household goods, with repetition in the range of products and a lack of anchor or attractive stalls.
There are 9 traders on the market that have a food hygiene rating of <3*.

Despite high footfall from residents, workers and visitors throughout the day, most people walk past the market as it does not offer products they want.

The market stalls are owned by market traders, have dated canopies and frames and the backs of the stalls face Whitechapel Road, creating a visual and physical barrier that block sightlines from the road of shops and make it difficult for pedestrians to get through the market to the bus stop.

The market traders generate boxes and packaging waste that is often not flattened before it is put in the waste containers, resulting in overflowing bins. Market traders also generate food waste that creates hazards for pedestrians and unpleasant smell when left overnight for collection.

Review of Brick Lane Market

Brick Lane Market has capacity for 248 stalls and operates every Sunday between the hours of 08.00-15.00 and has an occupancy rate of 46%, the 6th highest performing market of the 9 street markets managed by the Council. Market traders sell a wide range of goods: clothing, jewellery, household goods, antiques, bric-a-brac and bicycles and a good variety of non-food goods provision.

There are 20 takeaway food traders that have <3* Food Hygiene rating and are in the private and Council operated markets. There are also 49 market stall traders that have not yet been inspected.

Market stalls have poor quality canopies that block sight lines to shops along the street.

There are also markets in the Truman Brewery site on Sundays:

- Up Market (vintage clothing, crafts and food)
- Vintage Clothing Market
- Backyard Market (arts and crafts,)
- the Tea Rooms (antiques and homeware) and
- Boiler House Food Hall selling a variety of food from across the world.

Truman Brewery is considered a destination in its own right and many visitors travel to Brick Lane to visit the Truman Markets.
The markets are attracting tourists, residents and people from outside the area.
These private markets add to Brick Lane's distinctive offer, attracting people to the area and provide a unique environment not found in other centres.

Review of Bethnal Green Market

Bethnal Green market is located on Bethnal Green Road has capacity for 104 stalls and operates Monday to Saturday from 08.00 to 18.00.

The Market traders sell daily convenience goods, fruit and vegetables, Asian and other clothing and serve a mainly local customer base.
The market occupancy rates are typically: Monday 62%, Tuesday 85%, Wednesday 81%, Thursday 80%, Friday 83% and Saturday 29%.
There are 0 traders with <3* Food Hygiene rating.

The market stalls are owned by an independent business and the condition of the equipment and quality of the canopies is poor and lack visual appeal. The market stalls are laid out on one side of the road with their backs facing Bethnal Green Road blocking the view to shops by passing traffic.

Footfall in the town centre is busiest during commuting hours and is much higher on Saturdays compared to weekdays.

While the market is a footfall generator, the shopping offer, including anchor stores such as Tesco, Iceland and Boots, and the centres proximity to Bethnal Green and Shoreditch High Street stations also attracts people to the area. The market has potential to add new stalls that improve the offer and appeal to a greater customer base.

Review of Roman Road East Market

Roman Road Market has capacity for 280 market stalls and operates 3 days per week on Tuesday, Thursday and Saturday from 08.00 to 18.00, with traders selling: convenience goods including fruit and vegetables, women's clothing and household goods and serving a mainly local customer base. The market stalls are located on both sides of the street between St Stephens Road and Gladstone Place and block sight lines to the shops on either side.

The occupancy rate on the market is typically: Tuesday 49%, Thursday 71%, and Saturday 79% and is the 3rd highest earning market of the Council's 9 street markets after Whitechapel as the 1st and Bethnal Green as the 2nd. There are … traders with <3* Food Hygiene rating.

The market stalls are owned and maintained by an independent business. Some of the market stalls are vintage style barrow stalls and add to the character of the market. However the condition of the canopies is poor and lacks visual appeal and the lack of uniformity of stalls height and evidence of illegal traders with goods on the ground reduces the visual appeal of the market.

Litter and waste management on the market needs attention and issues with fly-trading were observed and Market spills into side streets.

Roman Road Trust piloted a Yard Market in 2016 and its future development could help to generate additional traders and customers.

Review of Chrisp Street Market

Chrisp Street market is managed by Tower Hamlets Council is located in the square in the town centre and is part of an estate managed by PoplarHARCA. The market has capacity for 100 stalls and operates Monday to Saturday from 8am to 6pm, with traders selling: daily convenience goods, clothing, fruit and vegetables and household goods serving a mainly local customer base.
The occupancy rate for the market is from 24% on Saturdays to 74% on Wednesdays and income from the market ranks the 7th highest of the 9 street markets managed by the Council.

The fruit and vegetable operators are key anchors for the market; they look poor and are often surrounded by waste and litter

The market stalls are owned and maintained by an independent business. PoplarHARCA is planning a redevelopment of Chrisp Street and once planning permission is secure will take 8 years to complete. The market will still operate during the development and will be moved around the Chrisp Street centre as the development progresses.

It is a priority for PoplarHARCA and Tower Hamlets Council's Market Team to work together to promote Chrisp Street market and town centre to ensure it has a good level of footfall during the development phase. There are piles of rubbish, especially from fruit and vegetables.

Since 2011 there have been 119 new units new housing completed within the 800 metre of Crossharbour District Centre. There are also 16 development sites around Crossharbour centre which will create an additional 10,906 housing units.

Review of Watney Market

Watney Market has capacity for 60 stalls, operating Monday to Saturday from 08.30 to 18.00, with traders selling: fruit and vegetables, fashion accessories, Asian clothing and household goods, and has a mainly local customer base. The occupancy rate of market stalls is from 75% to 97%, the 2nd highest rate after Whitechapel market.

The market stalls are located on a pedestrianized section of Watney Market with the Idea Store by Commercial Road to the north and arranged in two rows between the main shopping areas. The market stalls are metal frames with canopies that lack permeability and block sightlines to the shops. The market is clearly an anchor for the town centre along with the Idea store. The south end of the market is near Shadwell DLR and Overland stations. However the market does not benefit from this proximity as much as it could due to the limited range of goods sold on the market. There are ….. market traders with <3* Food Hygiene rating.

Review of Roman Road Square Market

The Roman Road Square market is located in Roman Road West, also known as Globe Town, with capacity for 28 stalls, operating Monday to Saturday from 8am to 6pm with traders selling convenience goods and fruit and vegetables. The market has occupancy rates of 4% to 18%, the lowest rate of all 9 street markets managed by the Council.

While some shops near the market attract customers from outside the area, the market has a local customer base due to its limited range of products. The market stalls are owned and maintained by an independent business and the condition of the equipment is poor, lacks visual appeal.

The layout of the market does not make the best use of the market square which is by Roman Road a busy traffic route throughout the day.
There is 1 market trader with <3* Food Hygiene rating.

3. Environment and Consumer Experience finding:

Table 4: Environment and consumer spending
(prepared by ATCM/the Retail Group for the purposes of this Strategy)

	Finding and Issues	**Whitechapel**	**Brick Lane**	**Bethnal Green**	**Roman Road East**	**Chrisp Street**	**Watney Market**	**Roman Road West**	**Crossharbour**	**Bromley-by-bow**
Environment	Limited customer facilities available	✓	✓	✓	✓		✓	✓	✓	
	Anti-social behaviour and graffiti	✓	✓	✓	✓	✓	✓	✓	✓	
	Need to improve litter management	✓	✓	✓	✓	✓	✓	✓	✓	
	Streets need deep clean	✓	✓	✓	✓	✓	✓	✓	✓	
	Public realm needs maintenance	✓	✓		✓	✓	✓	✓		
	High traffic volumes	✓		✓		✓	✓	✓		
	Limited sense of place	✓		✓			✓	✓		

Whitechapel Environment and Customer Experience

The Council undertook an extensive shop front improvement scheme as part of the High Street 2012 initiative.

The layout of the market stalls along one side of Whitechapel Road exceeds their designated limits. Recent Enforcement action has ensured that trader stalls are now within their designated limits.

The condition of stall frames and lack of permeability of the canopies makes it difficult for pedestrians, particularly visitors, to access the bus stop on Whitechapel Road and also for those traveling along the road to see the shops.

The public realm is unpleasant in parts due to packaging and food waste generated by market traders overflowing in waste bins and an unpleasant smell when food waste is left overnight, creating obstacles and an unpleasant experience for pedestrians. Also some traders park their van illegally on Whitechapel Road by the market, adding to the obstacles experienced by pedestrians and the poor visual impression of the market and the area.

There are some way-finding panels in the centre, but limited signage promoting the market and supporting the visitors.

Whitechapel Road is a busy main route connecting Whitechapel District Centre with Aldgate and the City and Bethnal Green. It is served by bus numbers 25 connecting with Ilford/Oxford Street, number 205 to Bow/Paddington, number 254 to Aldgate/Holloway, and D3 to Bethnal Green/Crossharbour at 5 to 11 minutes per hour. The district centre has 3 tube station including Whitechapel, Aldgate East and Aldgate within a 10 minute walk from the centre.

Whitechapel Road is part of the Cycle Superhighway CS2. There are cycle docking stations by: New Road with 36 bike spaces, Royal London Hospital with 42 bike spaces and by Aldgate with18 bike spaces. There is also a cycle shop opposite the market. There is a total of 25 pay and display parking bays and 4 loading bays.

The central drain channel along the pavement where the market is located is clogged with weeds causing flooding of the area when it rains causing inconvenience for traders and pedestrians. Also some shop owners are disposing waste cooking oil down the drain on Whitechapel Road, creating the risk of a blockage and potential congestion to resolve the block.

The total number of 1,012 reported crimes for the area showing on the figure below in the 12 months to September 2016, with 237 (23.4%) Anti-Social Behaviour (ASB), 189 (18.7%) Violence and Sexual offences and 188 (18.6%) Other. The nature of the ASB crimes related to drugs and alcohol misuse and crimes by groups of youths and addressing these issues is a priority for the area. The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

There are no public toilet facilities in Whitechapel and retail businesses are reluctant to offer the use of their toilets to customers attending the market.

The area has some signage to support way finding but this could be improved and the sign stating restriction on parking needs to be reinstated.

Brick Lane Environment and Customer Experience

In the north and central section of Brick Lane town centre there is good evidence of investment by retail businesses in their shop fronts with some investment by retailers in the southern end of Brick Lane and businesses are performing well from Fashion Street northwards.
Most empty units are re-occupied quickly. There are two long-term vacant development plots in the south section of Brick Lane opposite Arbor City Hotel and adjacent to the railway lines near Sclater Street.

Truman's Brewery and the curry houses are evening footfall generators and at weekends the six Sunday markets generate significant footfall. However there is overcrowding around Truman Brewery and also in nearby Spitalfields.

There is graffiti throughout Brick Lane particularly around the railway bridge. Some of the graffiti attracts visitors, but there are sections where graffiti and tagging on shop fronts reduces the appeal and is a concern expressed by businesses.

Beggars, street sleepers, tagging, litter and detritus and people urinating and vomiting in the street are a common sight at night. The area would benefit from a regular deep clean and tighter of cleansing and litter management, particularly at weekends and Monday mornings.

There are no buses serving Brick Lane itself. The nearest bus routes are along Commercial Street with bus numbers 254 to Holloway/Aldgate East, 25 to Ilford/Hainault and 67 to Aldgate and the north end of Brick Lane on Bethnal Green Road is served by bus numbers 8 to Bow Church/Tottenham Court Road and 388 to Stratford City/Blackfriars at intervals of 5 to 14 minutes/hour.

The nearest station to the south of Brick Lane is Aldgate East, which is served by the Hammersmith and City and District Lines, with 12.84million entries/exits in 2015 and Whitechapel station, served by the Hammersmith and City, District and Overland lines, with 11.7million entries and exits in 2015. On the north side of Brick Lane District Centre Shoreditch High Street station is served by the Overland Line with 4.878million entries and exits in 2015.

Whitechapel Road at the southern end of Brick Lane District Centre is part of the Cycle Superhighway CS2 route from Stratford to Aldgate. There are also quiet way cycle routes recommended by cyclists along Hanbury Street, Quaker St and Commercial Street. There are TfL cycle docking stations with: 18 spaces at Central House, Aldgate with 17 spaces; Brick Lane Market, Shoreditch with 20 spaces and Buxton Street with 39 spaces. There are 77 pay and display parking spaces, with 29 loading bays.

There were a total number of 592 reported crimes for the area in the 12 months to September 2016. The highest category of reported crimes was 143 (24.2%) Anti-Social Behaviour (ASB), followed by 95 (16.0%) other theft and 84 (14.2%) Violence and Sexual Offences. The nature of the ASB crimes related to drugs and alcohol misuse and crimes.

The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Bethnal Green Environment and Customer Experience

There is evidence of investment by retailers in pubs and 'trendy' cafes and some businesses said they plan to invest in their premises. There are low vacancy rates on Bethnal Green, with units taken up quickly and sites such as the former cinema subject to development plans.

There is good accessibility offered by bus services and Bethnal Green and Shoreditch High Street stations. Bethnal Green Road is a busy route with bus numbers 8 connecting with Bow Church/Tottenham Court Road, number 388 connecting with Blackfriars/Stratford City Bus Station and number D3 connecting with Crossharbour/London Chest Hospital with services at 3 to 8 minutes. Bethnal Green Underground at the junction of Bethnal Green Road and Cambridge Heath Road had 16.164 million passenger entries and exits in 2015. There is one cycle bank in Bethnal Green District Centre by Potts Street with 19 docking stations and also one just outside the district centre boundary by Granby Street with 25 cycle docking stations. There are 124 pay and display spaces and 21 loading bays.

The crossing point from the Children's Museum to Bethnal Green Road is difficult and needs to be improved and the railway bridge at the entrance to Bethnal Green Road cuts off the sightline to the town centre, which together with the lack of signage does not encourage museum visitors to use the town centre.

Bethnal Green Road does not feel dirty or littered but there is some evidence of graffiti in the town centre. There are no public toilets and pressure on shop owners to provide the use of their facilities to customers using the market.
Plans to switch to LED lighting will improve the lighting levels in the town centre. Members of the Bethnal Green Business Association said they would like to improve the sense of place, community facilities and green spaces in the centre.

Bethnal Green District Centre had 475 total numbers of reported crimes in the 12 months to September 2016. The highest category of reported crime was violence and sexual offences at 111 (23.4%), Shoplifting at 76 (16%), other theft 53 (11.2%), and theft from the person at 47 (9.9%).

The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Roman Road East Environment and Customer Experience

There is evidence of investment by retailers in premises in the western half of the Roman Road East, but the eastern half of the town centre lacks investment in premises with many with oversized signage out of proportion with the shop front. While the market is well-liked by customers the quality of stalls could be improved.
There is evidence of litter and graffiti in Roman Road town centre suggesting a need to improve cleanliness, particularly due to litter not being picked up and overflowing bins and the market is very untidy mid/late afternoons.

Roman Road is a busy main route with bus numbers 8 connecting with Bow Church/Tottenham Court Road, number 276 connecting with Stoke Newington Common/Newham University Hospital, number 488 connecting with Bromley by Bow/ Kingsland Road with services at 7 to 10 minutes.

The nearest tube station is Mile End Underground located within a 15 minute walk from Grove Road had 16.3M entries/entries in 2015 and Bow Church DLR station 10 minutes from Tredegar Road, had 3.2 million passenger entries/exits in 2015. There are 32 pay and display parking spaces and 10 loading bays. There is also parking in the Tesco car park for customers only.

The junction at St Stephens Road becomes very congested and the noise pollution is considered to slightly deter from the market's environmental quality. It is also hazardous for pedestrians crossing the road to and from the market.
There is a very small car park next to Tesco with a one-hour limit and some street parking available nearby but very expensive.

Signage and there is some way finding from key local stations however this could be improved given the potential to promote the centres social history and heritage to generate additional visitors to the centre, particularly during the week.

The public realm is in poor condition and Gladstone Place has excessive street furniture and clutter, including bins, seating and telephone boxes.
The road surface in some areas is uneven and would benefit from being repaired or re-laid. The centre lacks available public toilets.

Roman Road East District Centre had 339 total numbers of reported crimes in the 12 months to September 2016. The highest category of reported crime was Anti- Social Behaviour (ASB) at 92 (27.1%), Shoplifting at 49 (14.5%), Violence and Sexual offences at 58 (17.1%). The nature of the ASB crimes particularly relates to drugs and alcohol misuse and crimes by groups of youths, street drinking around Gladstone Place and graffiti / tagging. The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Chrisp Street Environment and Customer Experience

The environment around the shops on East India Road is especially poor with lack of investment in shop fronts and signage that is out of proportion with the fascia.

The centre is well served by bus and the DLR, with All Saints Station across the East India Quay Road which cuts off part of the centre. While free parking is available for Co-op users, most of the users of Chrisp Street town centre walk to the centre (as indicated in PoplarHARCA's survey of centre users in December 2016).

Chrisp Street District Centre has the East India Dock Road (A13) running through it by All Saints Station and connecting the centre with Watney Market and Canary Wharf and served by bus number D6 to Cambridge Heath/Crossharbour, number 115 to East Ham/Aldgate and 15 to Romford/Trafalgar at 7-10 minutes hour.
The nearest station is All Saints, which is located across from Chrisp Street market entrance and had 1.99m entries and exits in 2015.

Local cycle routes include a route through Upper North Street which is 'an alternative route recommended by cyclists'. However, cycling in the area is known as difficult. There is a cycle docking station by the Chrisp Street Market with 18 cycle spaces and a cycle shop opposite the market. There are 5 pay and display spaces and 0 loading bays**.**

Chrisp Street District Centre had 339 reported crimes in the 12 months to September 2016. The highest category of reported crime was Anti- Social Behaviour (ASB) at 92 (27.1%), Shoplifting at 49 (14.5%), Violence and Sexual offences at 58 (17.1%). The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Public toilets at Chrisp Street are in need of attention and maintenance.

Waste collection is an issue in Chrisp Street and PoplarHARCA are keen to work with Tower Hamlets Council to explore how they can take on the management of waste on their estate.

Signage to Chrisp Street is good from All Saints Station; however, the challenge for Chrisp Street is to generate most people from outside the area to use the centre

Watney Market Environment and Customer Experience

There is evidence of investment in Watney Market with some recently refitted units to the south of the centre near Shadwell DLR and Overland stations. Shops in the rest of the centre lack signs of investment have poor window displays with views into the unit obscured and at night units along Commercial Road are shuttered up and closed to the street.

The business shop front facing Commercial Street could be improved to achieve a more active frontage to this main arterial route.

There is visible litter and some graffiti in the centre and the quality of the pavement surface in the centre could be improved. There have been drug addicts and rough sleepers in Watney Market Car Park, as there are no gates at either end of the car park.

Commercial Road is a good arterial road to the north with a frequent bus service and a DLR and Overland stations to the south.

Shadwell DLR station has 15 trains per hour to Bank, 6 to Tower Gateway, 6 to Woolwich Arsenal, 6 to Becton and 9 to Lewisham, with 8.6million entries and exits in 2014 to 2015, an increase from 6.67million in 2012 to 2013. Shadwell Overland Station has 9 trains per hour to Whitechapel, 5 to New Cross and 4 to New cross Gate and 8 trains per hour to Highbury and Islington, with 2.67million exits and entries in 2014 to 2015, up from 2.208 million in 2012 to 2013.

Commercial Road is a very busy main arterial route with bus numbers 15, 115 and 135 connecting Watney Market District Centre with Whitechapel to the west and Limehouse interchange at intervals of 6-12 minutes. The D3, 100 and 339 buses serve Shadwell station and operate at 7-12 minute intervals. Cable Street connects with Limehouse/Tower Gateway via bus: D3, 100 and 551 at 7-12 mph.

There are 5 pay and display space and 2 loading bays. This reflects the pedestrianized nature of the centre and the low car ownership in the area. Businesses on Chapman Street include some wholesale businesses, which have been known to take deliveries in unsocial hours and are known to cause noise complaints.

The Cycle Superhighway CS3 runs through Cable Street by Shadwell DLR and Overland stations. There are cycle docking stations by the entrance to Watney Market on Commercial Road with 48 cycle stands and by Shadwell Station on the south side with 18 cycle stands.

Watney Market had 502 reported crimes in the 12 months to September 2016. The highest category of reported crime was Anti- Social Behaviour (ASB) at 156 (31.1%), Violence and Sexual offences at 101 (20.1%) and Public Order at 36 (7.2%), The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

The centre has some way-finding within the centre itself. However the connections to local Overground and DLR stations and to new housing developments such London Dock where there is 1800 housing units being developed needs further consideration.

Roman Road West Environment and Customer Experience

There is evidence of retailer investment on the western side of the centre with good quality shop fronts, window displays and contemporary layouts.
There were 17 vacant units in the centre in 2016, with many of these units vacant for some time.

Throughout the centre many premises have their security shutters pulled down even when the shop is open during the day giving the impression the centre is closed. There is evidence of street drinking and a lot of the shop units both vacant and open and community buildings such as the Mosque and GP Surgery have graffiti

Roman Road is a busy main route connecting Roman Road West District Centre with Bethnal Green and Roman Road East District Centre and is served by bus numbers D6 to Crossharbour/Ash Grove, number 8 to Bow Bus Garage/Tottenham Court Road and 277 to Mile End/Leamouth at 5 to 11 minutes per hour. The nearest tube station is Bethnal Green which is a 10minute walk from the centre.

There are two cycling quietways recommended by cyclists running through Roman Road West, with one along Globe Road and one in the middle of the district centre through Morpeth Street by the Globe Town Market leading into Bonner Street.

There is a cycle docking station by the Market Square (Globe Town Market) on Roman Road with 20 cycle stands and a cycle shop opposite the market.
There are 16 pay and display spaces in Roman Road West and 1 loading bay.
There are stretches of Roman Road which have railings along the street and therefore restrict access for loading). There is also a private car linked to the supermarkets in Roman Road Square.

Traffic flow along Roman Road West is generally high but congestion levels are much lower than along nearby Bethnal Green Road. Although the resulting noise pollution impacts on the centre's environmental quality and attractiveness and adds to pedestrian/vehicle conflicts, there are traffic calming measures in place on Roman Road to help control this.

The public realm appears run down with many shop fronts with graffiti and signage in need of repair. Whilst there is considered to be a generally good provision of seating and planting across the centre, maintenance needs to be improved, particularly in the Market Square. In contrast the public realm along Globe Road is of a higher quality and has examples of street planting and shop fronts that are well maintained.

Roman Road West town centre is known as an area for student accommodation and is only 15 minutes by bus from Queen Mary University on Mile End Road. The Universities expansion plans will create more demand for the new housing development sites near the town centre, which will generate … new homes.

Roman Road West is separated from Roman Road East by a bridge over the Regents Canal which runs from Limehouse Basin to Victoria Pak, and the Millennium Park running along the eastern side of the Canal.
While these assets add to the overall appeal of the area the town centre does not benefit as much as it could from traffic in these locations.

Roman Road West had 147 reported crimes in the 12 months to September 2016. The highest category of reported crime was Anti- Social Behaviour (ASB) at 72 (49%), Violence and Sexual offences at 14 (9.5%) and 8 (5.5%) Burglary 8 (5.5%) Criminal Damage and Arson and 8 (5.5%) The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Crossharbour Environment and Customer Experience

The quality of shop fronts in cross harbour is good. Crossharbour DLR station is located in the middle of the district centre and next to the Asda Superstore, with its raised track cutting off sightlines to the rest of the centre.

Crossharbour DLR station had 4.127 million entries/exits in January-December 2015. The centre is served by bus numbers: D6 to Ashgrove, 135 to Old Street and D8 to Stratford at 5-10minute intervals.

Crossharbour has 236 reported crimes in the 12 months to September 2016. The highest category of reported crime was Anti-Social Behaviour (ASB) at 87 (36.9%), Violence and Sexual offences at 34 (14.4%) and 32 (13.6% shoplifting. The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Bromley by Bow Environment and Customer Experience

The A12 provides a major physical barrier between the east and west aspects of the district centre, with access via a subway which is poorly lit and have visible litter and graffiti present.

The centre is adjacent to Bromley by Bow underground station which is on the District and Hammersmith Lines.

Bromley by Bow had 167 reported crimes in the 12 months to September 2016. The highest category of reported crime was 39 (23.4%) vehicular crime, 37 (22.2%) shoplifting and 19 (11.4%) Violence and Sexual Offences.

The number of reported crimes in all town centres is thought to be lower than actual figures and promotion is needed to encourage people to report crime to get a more accurate picture.

Maps showing the extent of the Town Centres referred to in sections 1 to 3 are included as Appendix 2.

4. The Night Time Economy (NTE) in Tower Hamlets' Town Centres

Overview in Night Time Economy in Tower Hamlets

Research carried out by the Association of Licensed Multiple Retailers states that Tower Hamlets has the 6th most-valuable Night Time Economy (NTE) in London and the 10th most valuable in the UK, with 583 core pub, club, bar and restaurants with a combined GVA of £121 million.

Between 2010 and 2016 the number of licensed restaurants increased by 49% from 215 to 320 and the number of hotels and other accommodation increased by 75% from 40 to 70. In the same period the number of licensed clubs decreased from 15 to 10 and public houses and bars decreased from 150 to 130.

Many businesses taking part in the NTE sell alcohol and/or are entertainment venues and need a license to operate their business.

Any premises that provide the following activities must secure a licence:

- the sale by retail of alcohol (on and off sales)
- the supply of alcohol by or on behalf of a club to, or to the order of, a member of the club
- the provision of regulated entertainment
- the provision of late night refreshment"

Local businesses in the evening/ Night Time economy

There are 297 licensed business premises in Tower Hamlets town centres (excluding Canary Wharf). On Brick Lane there are a total of 127 businesses with licenses, including: 97 restaurants and cafes, 19 retail businesses, 6 pubs/bars, 3 community and social clubs, 1 hotel and 1 event venue.

Whitechapel town centre has 30 licensed businesses: 15 retail businesses, 9 restaurants and cafes, 5 pubs/bars, 1 hotel and 1 other.

Bethnal Green town centre has 43 licensed businesses: 14 retail businesses, 12 restaurants and cafes and 7 pubs, 2 social club, 1 hotel and 4 entertainment venues.

In Roman Road East there are 37 licenced premises: 17 retail, 15 cafes and restaurants, 1 hotel and 4 pubs/bars

Chrisp Street has 19 licensed premises with: 7 retail businesses, 9 restaurants, 1 hotel, and 2 pubs/bars
Roman Road West has 18 with: 10 retail businesses, 5 pubs/bars, 2 restaurants and 1 social club.

There are 17 licensed premises in Watney Market: 11 retail businesses, 4 pubs/bars, 1 restaurants and 1 community centre.

Crossharbour has a total of 6 licensed businesses with: 1 retail, 1 pub, 3 restaurants and 1 social club.

There are no licensed premises in Bromley-by-Bow.

Managing the Evening Economy in Tower Hamlets

In 2016 Tower Hamlets Council carried out consultation on introducing a Late Night Levy, which targets businesses that supply alcohol between midnight and 6am.

The Levy would raise finance, through charging these businesses, to help pay for the extra enforcement costs that the night-time economy generates for police and licensing authorities.

There are approximately 200 alcohol related ambulance call-outs per month in the borough. In relation to all ambulance call-outs in Tower Hamlets, on average 17% of incidents occurring during the week take place between midnight and 6am and at weekends this figure is 22%.

In addition, recorded crime data shows a peak in the number of alcohol-related incidents at licensed premises occurring from 12.30am, which is within the potential levy period.

The council, after consultation, revised its Statement of Licensing Policy to include a cumulative impact zone for the Brick Lane area.
The night time economy sector is a destination driver and anchor for Brick Lane Town Centre and deserves to have its own brand and identity.

The Night Time Levy will raise an estimated £350K, depending on how many businesses decide to retrain their late night licence once the levy comes into effect in June 2017.

It is proposed that the net amount collected is allocated on a 70/30 split, with the funding managed by the Community Safety Partnership. This Partnership has responsibility for liaison with the both public and voluntary sector on community safety issues.

Possible ideas under consideration by the Partnership for how to spend the Late Night Levy Funds include:

- Taxi Marshalls
- Street Pastors
- Street Cleaning
- Enforcement Initiatives - Night time enforcement officers
- Personal Safety Initiatives
- Health Care Facilities
- Additional Police or private security
- Financial support to assist schemes that promote improved management of licenced premises, such as Best Bar None or Pub watch

Best Bar None

Tower Hamlets has a Best Bar None accreditation scheme for licensed premises, and during 2016 awards were available for businesses that got accreditation in Canary Wharf, Brick Lane and at borough level.
An initial group of 39 businesses responded in 2016 and wanted to take part in the scheme, of which 18 completed their applications and achieved Best Bar None accreditation.

With the introduction of the Late Night Levy from June 2017, businesses taking part in the Best Bar None Scheme will receive a 30% reduction from the levy.

The Shop Tower Hamlets town centre online marketing and promotion platform will highlight the Best Bar None accredited businesses and winners of awards to help increase participation in this good practice and crime prevention scheme.

5. Management and partnership development

Intention of town centre partnerships

In addressing the challenges faced by town centres to improve their performance and competitiveness, having a structure to engage with businesses will help:

- manage communication with business and market traders in the centre regarding public realm improvements,
- generate support and buy-in for actions to improve performance
- consultant with businesses and market traders on public realm improvements, marketing and promotion activities and business development and training needs
- support delivery of events and activities to generate footfall
- promote participation in business support/ training initiatives including: social media, marketing, support for new and growing businesses.
- Encourage businesses in their network to do their own marketing and promotion and link this to place promotion for their town centre
- promote participation in local town centre management arrangements such as Best Bar None

The town centre partnerships will help explore opportunities for establishing initiatives to improve the management of town centres including:

- Business Improvement District (BID) with a night-time economy focus
- waste collection to meet local needs, more pickups to prevent build up and improve overall health of town centres

Local statutory partnerships supporting town centres:

- <u>The Community Alcohol Partnerships (CAP)</u>
  The CAP in Tower Hamlets and brings together local retailers and licensees, trading standards, police, health services, education providers and other local stakeholders, to tackle the problem of underage drinking and associated anti-social behavior, including street drinking.

- <u>Crime and Community Safety (CSP)</u>
  The Tower Hamlets CSP is a multi-agency strategic group, with members working in partnership to deal with complex community safety issues, including issues in town centres.

  Tower Hamlets CSP conducts an annual strategic assessment of crime, disorder, anti-social behaviour, substance misuse and reoffending in the borough, consult members of the public and wider partnership on their findings and produces it’s Community Safety Partnership Plan.

  The strategic assessment and the findings of the public consultation are then used to produce the partnership’s Community Safety Partnership Plan, which is also a statutory document.

Neighbourhood Forums

Neighbourhood planning is a new right for communities introduced through the Localism Act 2011. Communities can prepare *Neighbourhood Plans* to influence the future planning priorities in their areas. These plans allow communities to set out their vision for their local area and create their own planning policies to guide development in their neighbourhood.

In Tower Hamlets the following Neighbourhood Area encompasses town centres in the area their approved area:

- The Roman Road Bow Neighbourhood Planning Area was approved by the Mayor 6th February 2017, with the designated area taking in Roman Road Town Centre.

- The Spitalfields Neighbourhood Planning Forum and Area were approved in April 2016, and the area it covers takes in Brick Lane.

- Isle of Dogs Neighbourhood Planning Area was approved in April 2016 which includes the Crossharbour area.

6. Business and Community Partnerships in place in town centres

i. Brick Lane Regeneration Partnership

The partnership was set-up in February 2017 to support and enable the successful delivery of regeneration works and activities on Brick Lane. Members of the partnership include:

- Brick Lane Restaurateurs Association reps
- Spitalfields Neighbourhood Forum reps
- Truman Brewery reps
- Market Traders reps
- Residents Associations reps
- Range of community group reps

ii. Bethnal Green Business Forum

The business forum is co-ordinated by Oxford House with membership from local businesses and market reps and also local Councillors. Oxford House will manage communication with Bethnal Green businesses and market traders to support delivery of regeneration activities in Bethnal Green town centre.

iii. Oxford House

Oxford House is committed to will help manage communication with Roman Road West town centre businesses and market traders to support consultation and delivery of regeneration activities in Roman Road West town centre.

iv. Roman Road Trust

The Roman Road Trust serves and supports the interests of residents and businesses on Roman Road, manages the Yard Market and innovative projects to help businesses be more competitive.
The Trust will help manage communication with both Roan Road East and Roman Road West businesses and market traders to enable the delivery of regeneration activities.

v. **Whitechapel Partnership**
Whitechapel does not yet have an active local partnership to support the development and delivery of regeneration activities. But it does have market reps that are keen to support regeneration in the area.

vi. **Watney Market Partnership**
There is no partnership currently active in Watney Market. But there is a market rep that acts as a contact with market traders.

vii. **Chrisp Street Partnership**
PoplarHARCA manages the estate in Chrisp Street and engagement with community networks and businesses on the estate. This will include preparing regeneration plans for the centre over the next 8 years. The Council will consider their proposals and planning application to ensure that it meets its requirements for the area.

viii. **Crossharbour**
There is an emerging Neighbourhood Forum in Crossharbour, which could support engagement with businesses and the community regarding future needs of the centre given the housing growth in the centre and redevelopment plans currently progressing.

ix. **Bromley by Bow**
There is not currently a business forum or partnership for Bromley-by-Bow.

7. Marketing and Place Promotion

The purpose of marketing and place promotion of our town centres is to attract people to visit the area and shop locally. It provides the opportunities for local businesses, market traders and local residents to come together to promote their local area. To do this effectively, each Town Centre will develop its own marketing and place promotion plan and agree these through their local partnerships. This will differ in content and focus depending on local circumstances, e.g. bringing old East Enders into Bethnal Green and Roman Road, maintaining the local focus of Watney Market or attracting international tourists into Brick Lane.

In developing local plans, consideration will be given to issues such as:

- **Identifying target visitor markets and local audiences**: who currently uses the centre – undertake local surveys or use existing information? How could more users be encouraged?

- **Promoting the current retail offer**: using digital maps, directories or apps to promote local businesses or undertaking 'buy local' campaigns and offers.

- **Mapping local facilities**: including leisure and social venues, local IDEA Stores and other local amenities.

- **Arriving by public transport**: it is not always obvious that there are local shopping opportunities e.g. the proximity of Shadwell Overground Station to Watney Market.

- **Providing directional signage at key arrival points for visitors to the borough**: Liverpool Street/Bishopsgate, Shoreditch High Street, Aldgate, Whitechapel, and Bethnal Green.

- **Way-finding into and between Town Centres**: visitors and local people are not always able to find local centres and markets e.g. Roman Road East Market is not sign-posted from nearby DLR stations. Walking routes between Town Centres e.g. Brick Lane to Whitechapel or Bethnal Green and Petticoat Lane to Brick Lane. Consider investing in directional and way-findings signage to help consumers with: arrival, explore and discover and generally generate footfall in our town centres.

- **Providing training and support to local retailers and traders**: in areas such as marketing and promotion, including use of online and social media channels.

- **Local history and heritage**: building up an understanding of local history and heritage e.g. Huguenots, Suffragettes, Cable Street, Jewish and Bangladeshi communities.

- **Developing the area's unique characteristics and selling points**: using these to develop specific promotional events e.g. healthy eating around markets, speciality markets, history and heritage trails.

- **Local events programme:** A programme of events and activities to promote visitors developed by local partnerships e.g. Roman Road Festival.

- **Promoting the street market:** Using a range of promotional opportunities to let local people know about their local markets – leaflets, social media, etc. Consider local visiting markets, developing food offers, offers and voucher schemes to promote healthy eating. Supporting existing and encouraging new traders to maintain vitality of the market offer. The heritage and history of the market, i.e. the borough contains many traditional East End markets which are underused promotional assets, as are the local links to history e.g. the Suffragette movement

- **Use of social media:** to promote initiatives and campaigns, encourage business and community engagement, be a platform for communicating future plans.

- **Web sites**: creating a local website such as Love Bethnal Green site or Columbia Road Market site.

- **Promoting Council campaigns:** such as Buy well, Voucher schemes, Best Bar None, etc. The Council is currently exploring the possibility of introducing a resident's card for Tower Hamlets residents. There is potential for this card to provide access to special offers e.g. money off vouchers, free access to leisure or other facilities. This will provide an opportunity to market and promote business opportunities in local town centres.

- **Attracting inward investment into the area:** ensuring that vacant units are filled, encouraging new development where appropriate, providing support and training to help businesses develop and grow. Encouraging upgrade and improvement of shop fronts in Town Centres.

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8. Review of Business Advice and Support

Support and Advice for business in town centres

There is a range of support available to businesses and market traders in Tower Hamlets to enable understanding and meet their legal requirements in the operation of their business and also help improve their performance and develop their business, including:

- terms and conditions of market pitch licenses and how market traders need to manage their pitch in order to comply with licence requirements
- advice on Food Hygiene rating requirements to meet the Council's minimum 3* rating to be complaint and
- training courses to secure Food Hygiene certificates
- advice and information for businesses that need to apply for a planning application to develop their property or a change of use classification.
- information on how to apply for Small business rates relief
- support and advice available to business to get accredited under Best Bar None, the Home Office initiative promoting good practice in the management of licensed premises.
- the Council has launched a range of business support products including access to retail marketing support, training for new entrepreneurs to set up in business, help for businesses to access local supply chains and support for businesses in growth sectors, e.g. digital tech, cultural and creative. It is also supporting those offering affordable workspace.

Summary of support needs requested by businesses

One to one support: While the guidance available from Council Officers and on the Council's website is helpful, feedback from businesses in town centres highlights the need to have more one-to-one support. Consultation with businesses and market traders also highlighted that any training or support provided would have to be delivered at their premises or in bite-sized sessions due to the low number of people they employ.

Completing the paperwork: Analysis of Food Hygiene rating scores for market traders and businesses with premises. Highlight weaknesses in their paperwork as a main factor for achieving a low score.

Cross contamination risks: Some types of food serving businesses identify cross contamination risks associated with handling meat are an issue.

Improve window displays and layout: The review of retail business premises and market stalls highlighted the need to support retailers and traders with improving their window displays and the layout of products in the store and market stalls.

Accessing social media: Development work on the #ShopTowerHamlets town centre marketing and promotion project highlighted that only a small number of businesses in town centres and market traders had websites or were active on social media.

Marketing and promotion plans: There was an expectation among businesses and market traders that the Council should lead marketing and promotion of their town centre.

Appendix 1 – Draft visions for Town Centres

These visions are being discussed and agreed with local partnerships. This is work in progress and will be updated as new partnerships are developed. To kick this section off, the agreed visions for the following areas are included:

Draft vision - Chrisp Street District Centre

By 2022 the regeneration of Chrisp Street will be well underway; re-stablishing this town centre at the heart of Poplar, with a more competitive retail offer including an expanded Idea Store, a new cinema, a range of community services, a thriving well managed street market and town centre, a place where creative and other start-up and developing businesses can grow and where local residents and visitors come to shop, relax and work; in a contemporary and outward looking environment that builds on and celebrates its Festival of Britain heritage and East London roots.

Priority actions for Chrisp Street:

- PoplarHARCA and Tower Hamlets Council work together to develop and manage Chrisp Street Market and its waste collection and recycling.
- PoplarHARCA will work with the Council and other partners to support businesses, market traders and implement a programme of events and activities to achieve a dynamic, active and open town centre during the regeneration programme.

Draft vision – Bethnal Green District Centre

Building on the best Bethnal Green town centre has to offer with its rich social heritage in Oxford House, local assets and strong community spirit, market traders, residents and businesses will work together as custodians of this centre in partnership with the Council, to: secure investment in the public realm to make Bethnal Green truly green, softening the impact of Cambridge Heath Road and strengthening the town centres connection to Bethnal Green Gardens and Museum Gardens; achieving a good shopping offer and a thriving, dynamic and well manage market in a bustling dynamic neighbourhood that feels safe and welcoming and hosts regular events and activities including a night/food market and Festival in Weavers Field.

Priority actions for Bethnal Green:

- Bethnal Green Forum will work with Tower Hamlets Council and Transport for London to develop a plan for improving the crossing point at Cambridge Heath Road making it safer, a better experience for pedestrians and that this busy junction has a better connection to the town centre and supports the economy of the area.
- Develop and curate Bethnal Green Market and identify new traders that add to the offer, attract more customers and support the aim of creating a dynamic, creative and thriving town centre.

Draft vision – Roman Road East District Centre

Roman Road East is a thriving centre at the heart of Bow, with a strong sense of community where residents, traders and businesses work together as custodians of this neighbourhood, working in partnership with the Council; to develop and maintain a good range of shops, restaurants & cafes, Idea Store and other community services, achieve an attractive market that celebrates its east London roots and create opportunities to share and celebrate its rich social history with local residents and visitors from outside the area and London.

Priority actions for Roman Road East:

- Roman Road Trust and Tower Hamlets Council will work together to develop and curate Roman Road Market and identify new traders that add to the offer, attract more customers.
- Roman Road Trust and Tower Hamlets Council work together to take forward a marketing & promotion campaign for the town centre to attract most visitors and create a dynamic, creative and thriving town centre.

<u>Draft vision - Brick Lane District Centre</u>

Brick Lane is a unique and quirky place, where its diverse resident community together with the diverse food, media and creative businesses share a strong sense of pride in its heritage, social history and creative expression; and where visitors come from far and near come to hunt for treasure in its markets, enjoy its many cafes, restaurants and shops.

Priority actions for Brick Lane District Centre:

- The Brick Lane Regeneration Partnership and Tower Hamlets Council will work together to implement a programme of improvements to the environment and visitor experience on Brick Lane.

Appendix 2 - Ranking of performance indicators

Performance Indicator Categories	Whitechapel	Brick Lane	Bethnal Green	Roman Road East	Chrisp Street	Watney Market	Roman Road West	Crossharbour	Bromley by Bow	Canary Wharf
Footfall	Very Good	Good	Very Good	Very Good	Opportunity for Improvement	Very Good	Good	Opportunity for Improvement	Opportunity for Improvement	Good
Geographical Catchment	Very Good	Good	Very Good	Very Good	Very Good	Very Good	Good	Very Good	Very Good	Very Good
Access	Very Good	Very Good	Very Good	Good	Very Good	Very Good	Very Good	Very Good	Very Good	Very Good
Car parking	Needs Attention	Very Good	Very Good	Good	Very Good	Needs Attention	Very Good	Very Good	Very Good	Good
Community Spirit	Good	Good	Good	Very Good	Very Good	Good	Good	Good	Very Good	Good
Retail offer	Opportunity for Improvement	Good	Very Good	Good	Good	Good	Good	Opportunity for Improvement	Opportunity for Improvement	Good
Culture and Leisure	Good	Good	Good	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Needs Attention	Needs Attention	Good
Events	Good	Good	Good	Good	Good	Needs Attention	Needs Attention	Needs Attention	Needs Attention	Very Good
Reported Crime	Needs Attention	Needs Attention	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Needs Attention	Needs Attention	Good	Good	Good
Street Markets	Good	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Needs Attention	Not applicable	Not applicable	Not applicable
Business confidence	Good	Good	Good	Good	Good	Good	Good	Good	Good	Very Good
Visitors satisfaction retail offer	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Very Good	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Good	Good	Good
Visitors experience satisfaction	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Good	Good	Opportunity for Improvement	Needs Attention	Opportunity for Improvement	Opportunity for Improvement	Good
Attractiveness	Good	Good	Good	Good	Good	Opportunity for Improvement	Needs Attention	Good	Opportunity for Improvement	Very Good
Crime and safety perception	Needs Attention	Needs Attention	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Needs Attention	Needs Attention	Good	Good	Very Good
Retail Sales	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Good	Good	Needs Attention	Good	Very Good	Very Good	Good
Partnership working	Opportunity for Improvement	Good	Opportunity for Improvement	Very Good	Opportunity for Improvement	Needs Attention	Needs Attention	Needs Attention	Needs Attention	Very good
Unhealthy businesses	Needs Attention	Good	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Very Good	Good
Vacant units	Good	Good	Very Good	Good	Very Good	Good	Very Good	Very Good	Very Good	Very Good
Night Time Economy (NTE)	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Opportunity for Improvement	Not applicable	Not applicable	Very Good

Appendix 2 Rankings for town centre performance indicators

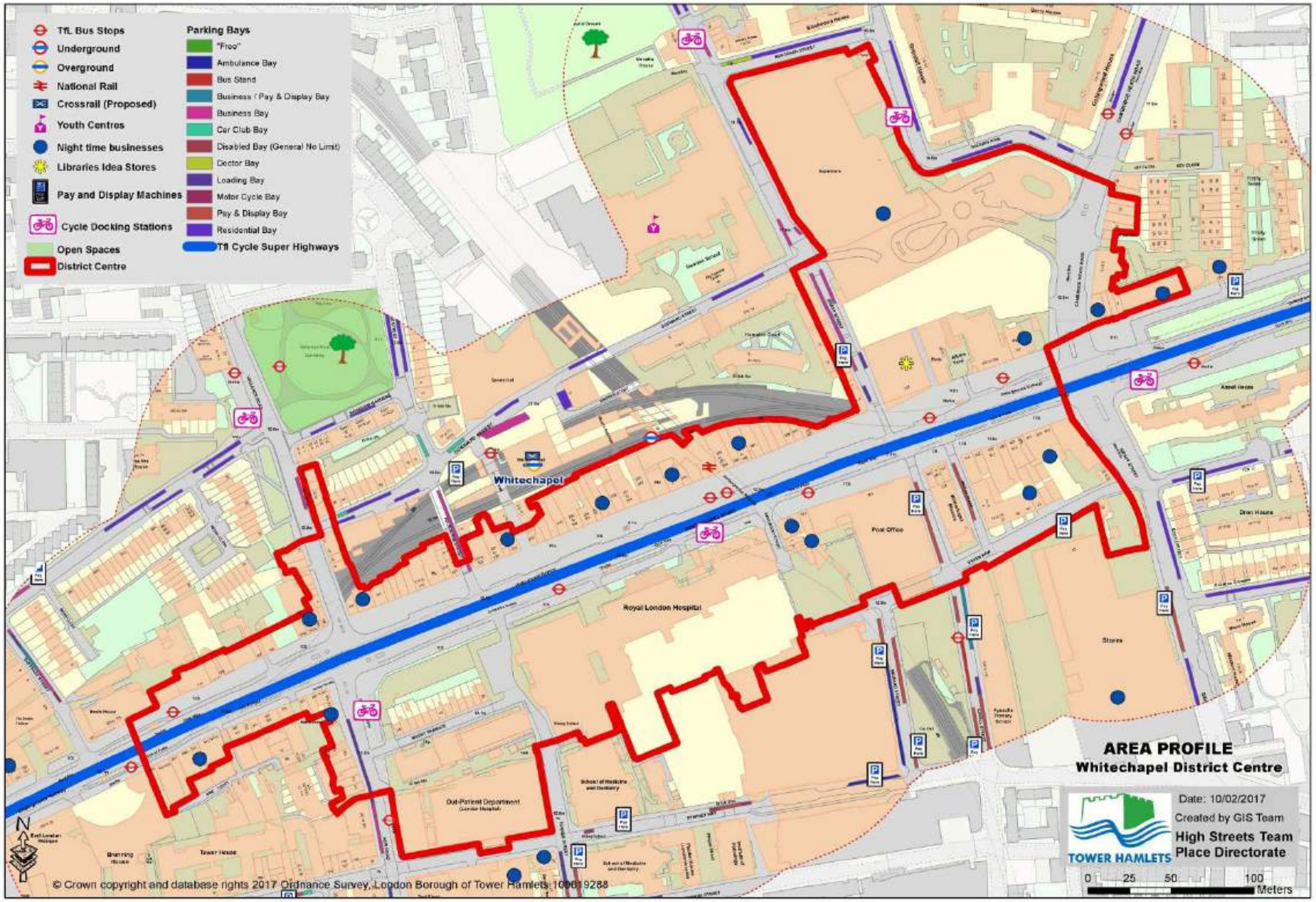
The following tables set out the definitions of rankings against each performance indicator

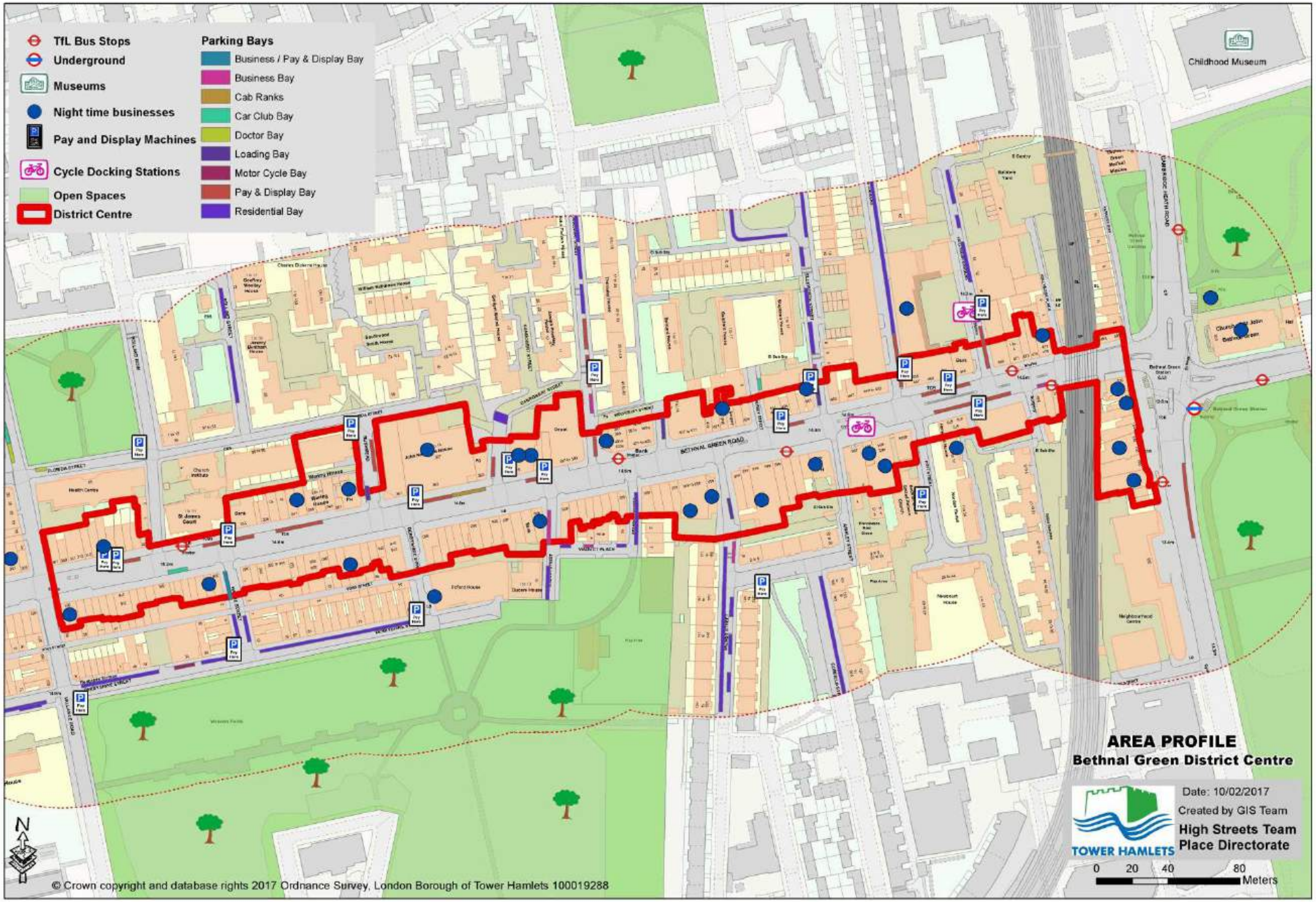
	Very good	Good	Opportunity for Improvement	Needs Attention
Footfall	High footfall throughout the day, with increase at peak commutes times.	High footfall at peak times, including commuter times, with lower figures at other times.	High footfall at commuter times only and lower figures at other times.	Low footfall throughout the day including at commuter times.
Geographical Catchment	Strong catchment area with wide customer base including: local residents, visitors including international visitors, workers and people from outside the area and frequency are typically several times a week.	A good catchment area with wide customer base, including: local residents, workers and a range of visitors from outside the area and frequency is typically a few times a week.	A good catchment area with limited customer base, attracting mainly local residents with some visitors/workers from outside the area and frequency is typically once a week.	A weak catchment area with a limited customer base attracting mainly local residents and some visitors/workers into the area and frequency is typically less than once a week.
Access	Good transport options, with tube service within the centre, good access by car and by foot, range of and frequent bus services with <5mins waiting times, high number of cycles for hire and cycle storage.	Good transport options with tube service within the centre, good access by car and by foot, frequent bus service with <5 minutes. Waiting times, good number of cycles for hire and cycle storage.	Good access by car and by foot, tube in or near the centre, frequent bus services with <8mins waiting times, some cycles for hire and limited cycle storage.	Good access by car and by foot, tube service in or near the centre, frequent bus services with <10mins waiting times, no cycles for hire and limited or no cycle storage.
Car parking	High number of car parking spaces available to local residents and customers using the centre, with restrictions and time limits for parking of up to 2 hours and good range of times of the day when parking is available.	Good number of car parking spaces available to local residents and customers using the centre, with restrictions and time limits for parking of up to 2 hours and range of times of the day when parking is available.	Reasonable number of car parking spaces available to local residents and customers using the centre, with restrictions and time limits of up to 2 hours and with demand for spaces at most times.	Low number of public & residential parking spaces available with restrictions on time limits for parking of up to 2 hours and high demand for spaces most of the day.
Community Spirit	Very positive messages expressed by residents, businesses and customers about their pride and loyalty and commitment to promote the town centre, with joint working and investment in social cohesion in evidence.	Positive messages expressed by residents, businesses and customers about their pride and loyalty and commitment to promote the town centre, with aspirations to work together and promote social cohesion.	Some +ive messages from residents, businesses and customers about their pride and loyalty to the centre, but lacks commitment to promote the centre and invest in social cohesion.	Community spirit is low with a negative perception expressed, showing a lack of pride and loyalty to the centre and little commitment to work together or promote social cohesion.
Retail offer	Strong retail offer with a wide variety of goods and services offered, meeting the needs of a diverse customer base, attracting people from outside the area and with potential for growth.	Good retail offer with a variety of goods and services offered, meeting the needs of a wide-customer base and with some potential for growth.	Good range of goods and services offered and meeting the needs of most of the customer base, but with room for improvement.	Limited retail offer, with gaps in the range of goods and services offered, meeting the needs of only some of the customer base with significant room for improvement.
Culture and Leisure	A good choice of theatres, cinemas and other entertainment services offered that appeal to a wide section of community.	Choice of theatres, cinemas and other entertainment services that appeal to a wide section of community, attracting some people from out of the area.	Some theatres, cinemas or other entertainment that appeal to a wide section of community, attracting some people from out of the area.	No theatres, cinemas or other entertainment in the town centre, thereby reducing the appeal of the centre.
Events	More than 1 licensed/ other events held in the centre on an annual basis.	1 licensed/ other event held in the centre on an annual basis.	1 licensed/ other event held in the town centre, but not regularly.	0 events only in the centre.

	Very good	Good	Opportunity for Improvement	Needs Attention
Street Markets	Street Market has 100% occupancy with effective management and governance practices in place and the offer is well curated, attracts a broad range of customers, with goods sold meeting their needs and quality requirements.	Street Market 80+% occupancy rate with good management and governance practices in place, the offer is well curated and attracts a good range of customers with goods sold meeting customer requirements.	Street Market 50-80% occupancy rate with good management and governance practices in place, with opportunity to attract more traders, improve the mix and balance of the offer.	Street Market has <50% occupancy with improving management and governance practices, with goods meeting only some customer needs and need to improve the offer.
Business confidence	High business confidence with new businesses opening and most business owners expecting growth.	Good level of business confidence, some new businesses opening with some business owners expecting growth.	Good level of business confidence, some new businesses, and businesses not expecting growth.	Low level of business confidence, few new businesses and business owners not expecting growth.
Visitors satisfaction with Retail Offer + markets	High level of satisfaction expressed by visitors with: choice of offer, standard of customer service and keen to come back and recommend the location to others.	Good level of satisfaction expressed by most visitors with: choice of offer, standard of customer service and keen to come back and recommend the location to others.	Good level of satisfaction expressed by visitors with: choice of offer, standard of customer service but highlighting improvements.	Low level of satisfaction expressed by visitors with: choice of offer, standard of customer service, highlighting weaknesses and concerns to be addressed.
Visitors experience satisfaction with the centre (including markets)	High satisfaction expressed by most visitors about the centre (ex retail) including: information about what's on, ease with finding their way around, the sense of atmosphere/ character of the place and most expressing high satisfaction expressed.	High level of satisfaction expressed by most visitors about the centre with some comments highlighting areas for improvement (ex retail) including: information about what's on, ease with finding their way around, the sense of atmosphere/character.	Good level of satisfaction expressed by visitors about the centre with comments highlighting areas for improvement (ex retail) including: information about what's on, ease with finding their way around and the sense of atmosphere/ character.	Good level of satisfaction expressed by some visitors with many comments highlighting areas for improvement (ex retail) including: information about what's on, ease with finding their way around and the sense of atmosphere/ character.
Attractiveness Public realm (including markets)	Very good perception of public realm in the town centre with businesses and visitors appreciating the standard of maintenance and quality of materials in the centre with no concerns expressed.	Good perception of public realm in the town centre with businesses & visitors appreciating the standard of maintenance and quality of materials in the centre and minor concerns expressed.	Fair perception of public realm in the town centre with businesses and visitors expressing some significant concerns that need to be improved.	Poor perception of public realm in the town centre among businesses and visitors, with significant concerns expressed about cleanliness and quality or maintenance of assets.
Crime and safety perception	Town Centre is perceived by businesses and visitors as a safe place with no major issues expressed.	Perception of safety in the town centre is good among businesses and visitors with some concerns expressed.	Perception of safety in the town centre is good but businesses & visitors express concerns about recurring issues.	Perception of safety in the town centre is poor with businesses and visitors expressing concerns about a range of recurring issues.
Retail Sales	Over 75% of businesses in the town centre reported turnover had increased on previous year's figures.	60-75% of businesses in the town centre reported turnover had increased on previous year's figures.	50-60% of businesses in the town centre reported turnover had increased on previous year's figures.	40-50% of businesses in the town centre reported turnover had increased on previous year's figures.
Partnership Working	Effective partnership structure is in place with representation from businesses, market traders and residents and active joint working with the Council /others to support place marketing & promotion and management of the town centre.	A partnership structure in place with representation from some businesses, market traders and residents and good level of joint working with Council/others to support place marketing & promotion and management of the town centre.	Informal partnership structure in place with some representation from businesses, market traders & residents and some joint working with the Council / others to support place marketing & promotion and management of the centre.	No formal partnership structure in place and limited joint working with the Council / others to support place marketing & promotion and management of the town centre.

	Very good	Good	Opportunity for Improvement	Needs Attention
Unhealthy Businesses	0% of unhealthy businesses in the town centre including fast food takeaways, betting shops and amusement arcades.	1-7% of unhealthy businesses in the town centre including fast food takeaways, betting shops and amusement arcades.	Under 8-15% of unhealthy businesses in the town centre including fast food takeaways, betting shops and amusement arcades.	Over 15% of unhealthy businesses in the town centre including food takeaways, betting shops and amusement arcades.
Vacant Units	0% vacant units in the centre.	1-5% vacant units in the centre (below UK average of 11.17%) and vacant units taken up within about 3 months.	6-10% of vacant units at national average of 11.17% and/or vacant units are on the market for up to 6 months.	11+% of vacant units higher than national average of 11.17% and/or vacant units on market for up to 1 year.
Night Time Economy (NTE)	Businesses play active role to support the effective management of the night time economy with all NTE businesses with pro-active business management practices in place Best Bar None (BBN) or other to help prevent issues arising on their premises.	Businesses play active role to support the effective management of the NTE and >50% of businesses with BBN or other pro-active business management practices in place to prevent issues arising on their premises.	Some NTE businesses play an active role in supporting the effective management of the NTE with <50% with BBN /other pro-active business management practices in place.	NTE businesses not active in the management of the NTE and with lack of involvement in BBN /other pro-active business management practices in place.

Appendix 3 – Maps of 10 District Centres





AREA PROFILE
Bethnal Green District Centre

Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate

TOWER HAMLETS

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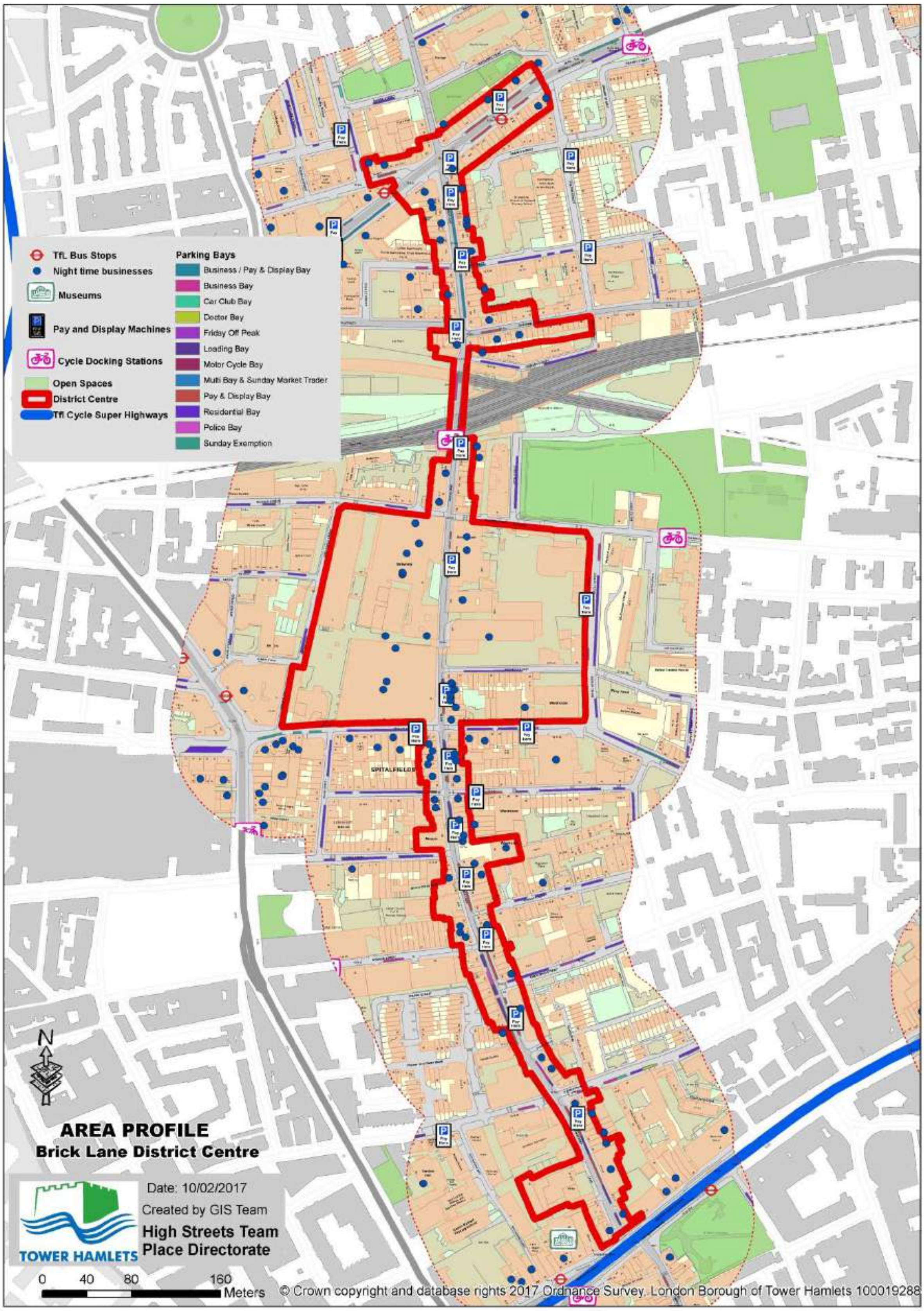
TfL Bus Stops
Night time businesses
Museums
Pay and Display Machines
Cycle Docking Stations
Open Spaces
District Centre
Tfl Cycle Super Highways
Parking Bays
Business / Pay & Display Bay
Business Bay
Car Club Bay
Doctor Bay
Friday Off Peak
Loading Bay
Motor Cycle Bay
Multi Bay & Sunday Market Trader
Pay & Display Bay
Residential Bay
Police Bay
Sunday Exemption
SPITALFIELDS
N
AREA PROFILE
Brick Lane District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
0 40 80 160
Meters
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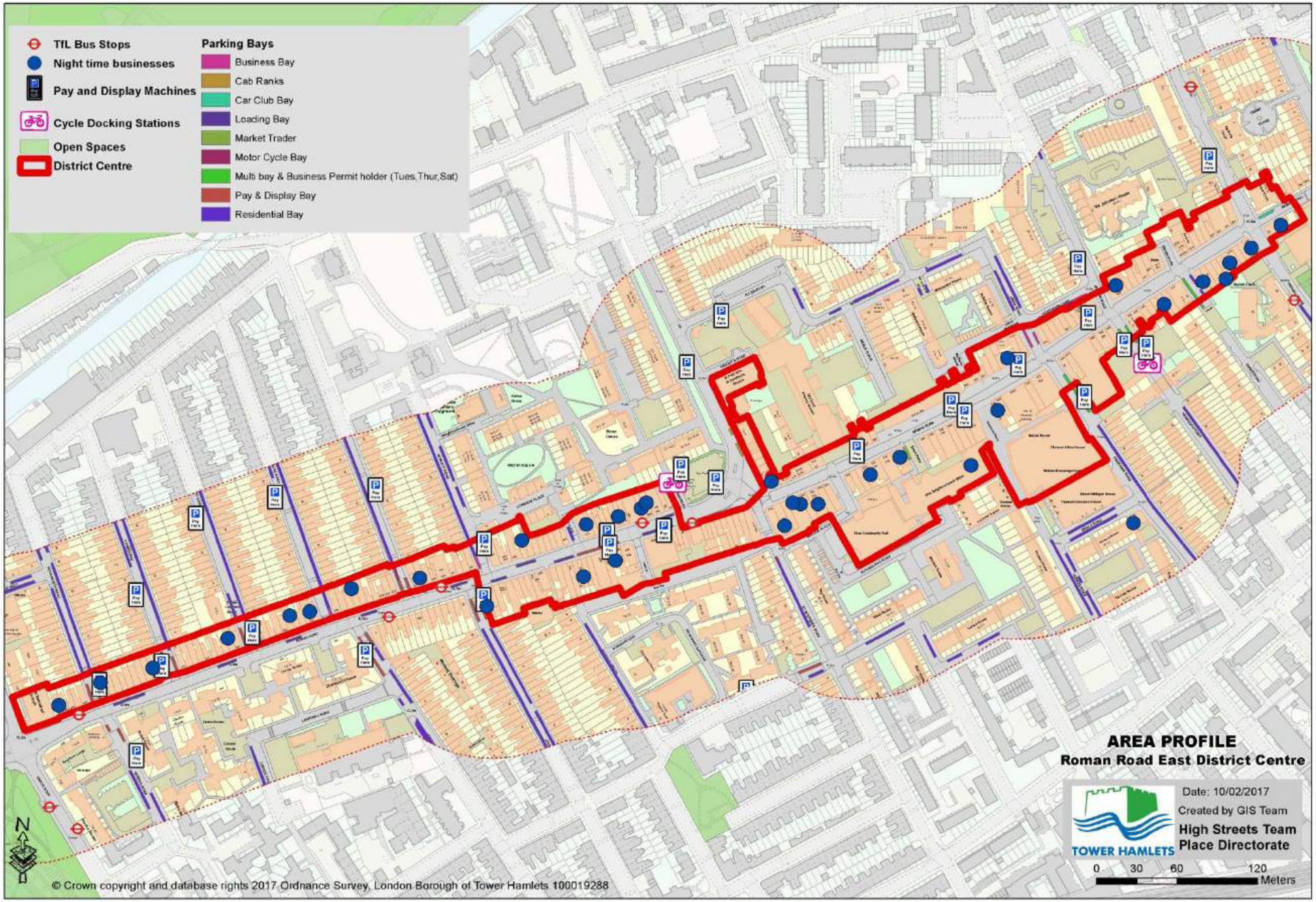
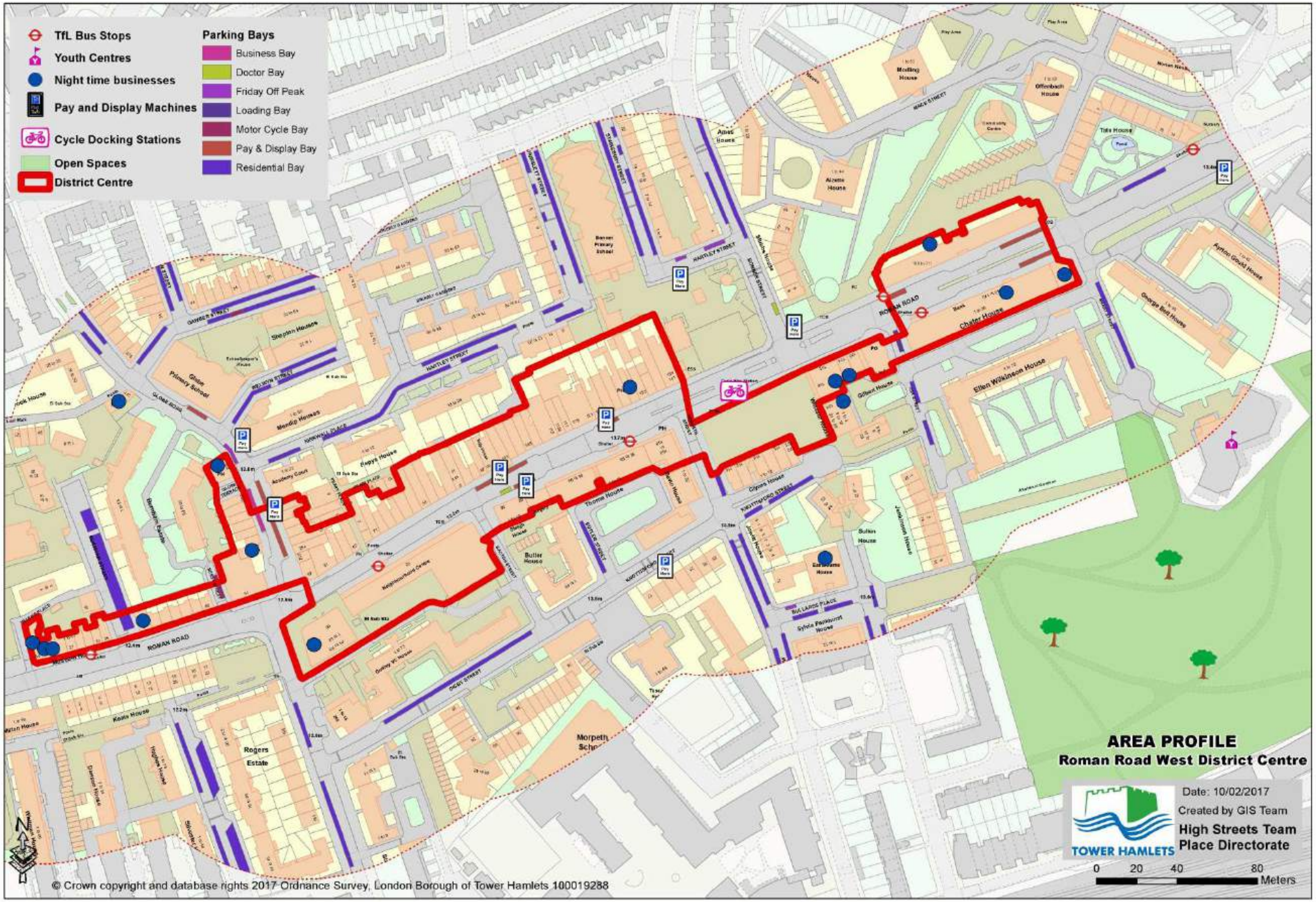


TfL Bus Stops
Night time businesses
Pay and Display Machines
Cycle Docking Stations
Open Spaces
District Centre
Parking Bays
Business Bay
Cab Ranks
Car Club Bay
Loading Bay
Market Trader
Motor Cycle Bay
Multi bay & Business Permit holder (Tues,Thur,Sat)
Pay & Display Bay
Residential Bay
AREA PROFILE
Roman Road East District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
0 30 60 120
Meters
N
© Crown copyright and database rights 2017 Ordnance Survey, London Borough of Tower Hamlets 100019288


TfL Bus Stops
Youth Centres
Night time businesses
Pay and Display Machines
Cycle Docking Stations
Open Spaces
District Centre
Parking Bays
Business Bay
Doctor Bay
Friday Off Peak
Loading Bay
Motor Cycle Bay
Pay & Display Bay
Residential Bay
ROMAN ROAD
AREA PROFILE
Roman Road West District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
0 20 40 80
Meters
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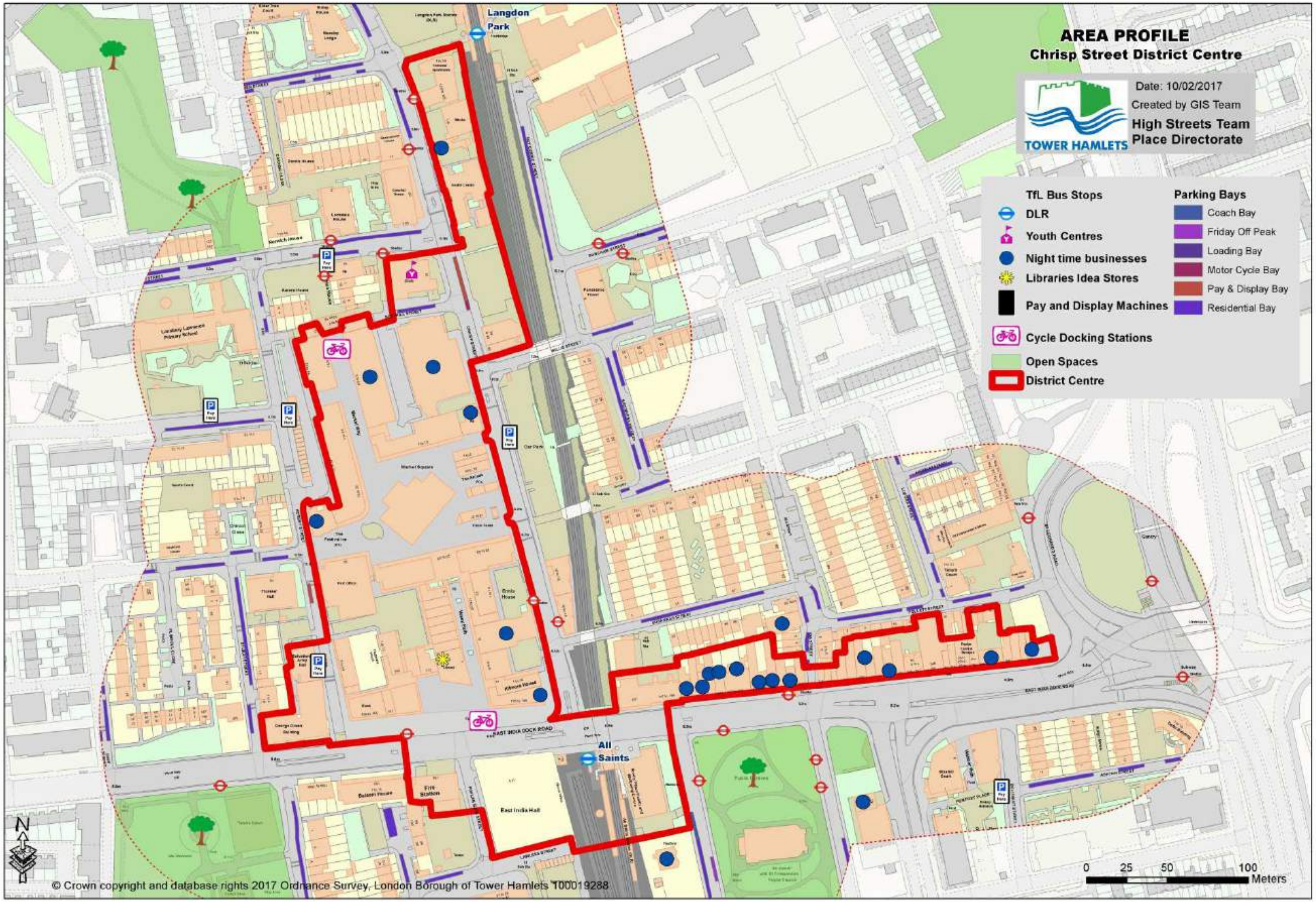
AREA PROFILE
Chrisp Street District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
TfL Bus Stops
DLR
Youth Centres
Night time businesses
Libraries Idea Stores
Pay and Display Machines
Cycle Docking Stations
Open Spaces
District Centre
Parking Bays
Coach Bay
Friday Off Peak
Loading Bay
Motor Cycle Bay
Pay & Display Bay
Residential Bay
Langdon Park
All Saints
N
0 25 50 100 Meters
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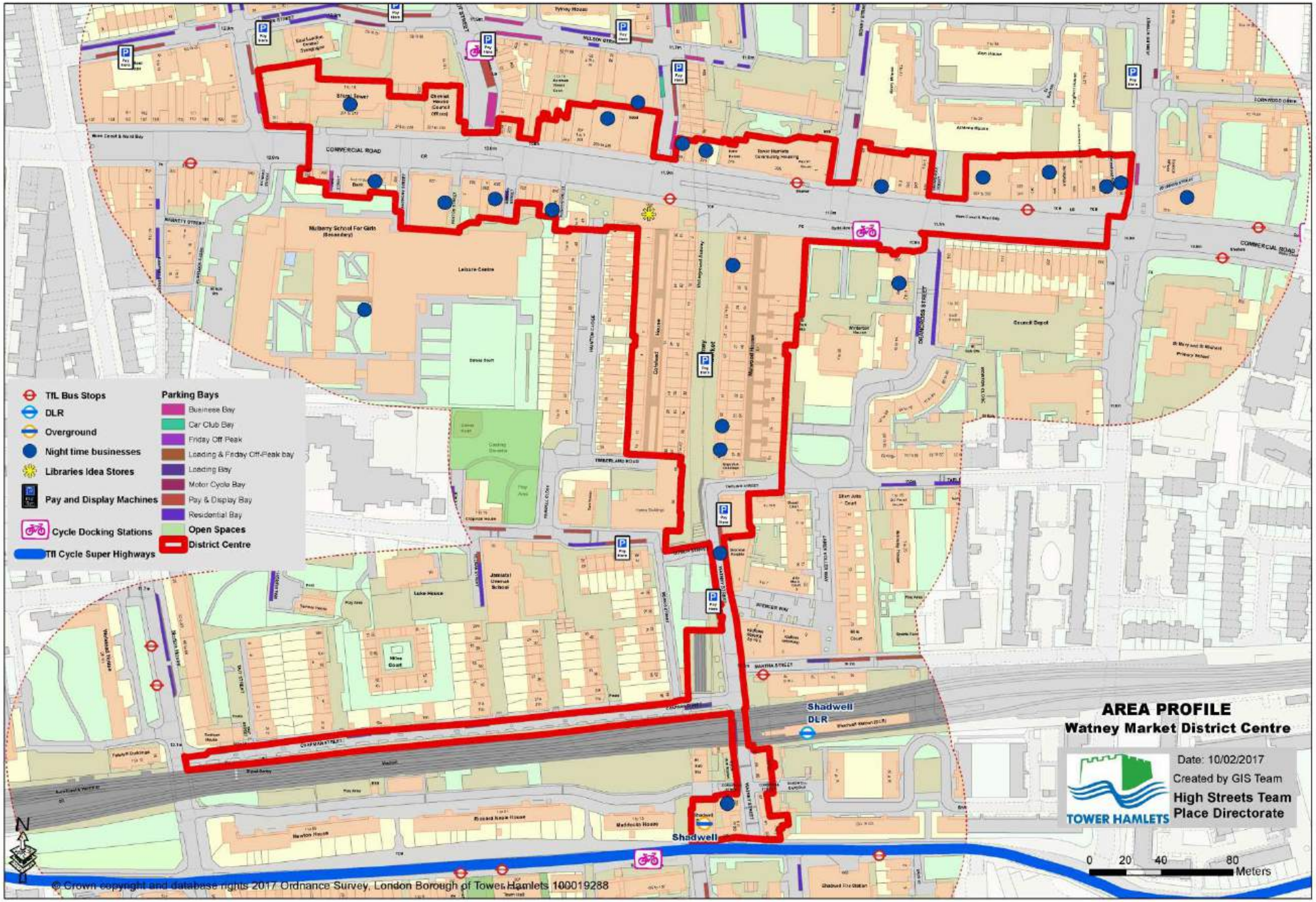
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Watney Market District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
TfL Bus Stops
DLR
Overground
Night time businesses
Libraries Idea Stores
Pay and Display Machines
Cycle Docking Stations
Tfl Cycle Super Highways
Parking Bays
Business Bay
Car Club Bay
Friday Off Peak
Loading & Friday Off-Peak bay
Loading Bay
Motor Cycle Bay
Pay & Display Bay
Residential Bay
Open Spaces
District Centre
COMMERCIAL ROAD
Mulberry School For Girls
Leisure Centre
Shadwell DLR
Shadwell
N
0 20 40 80 Meters
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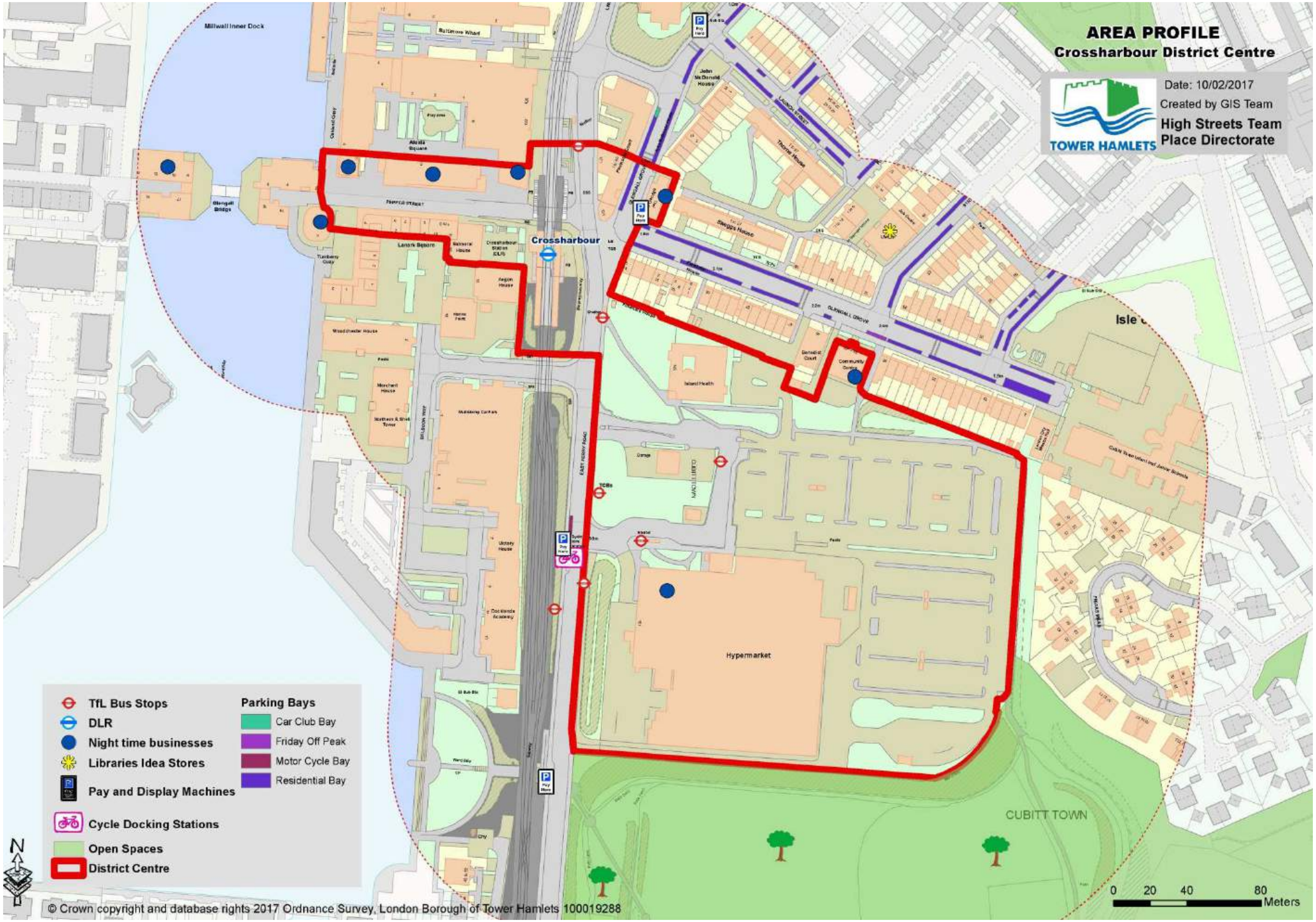

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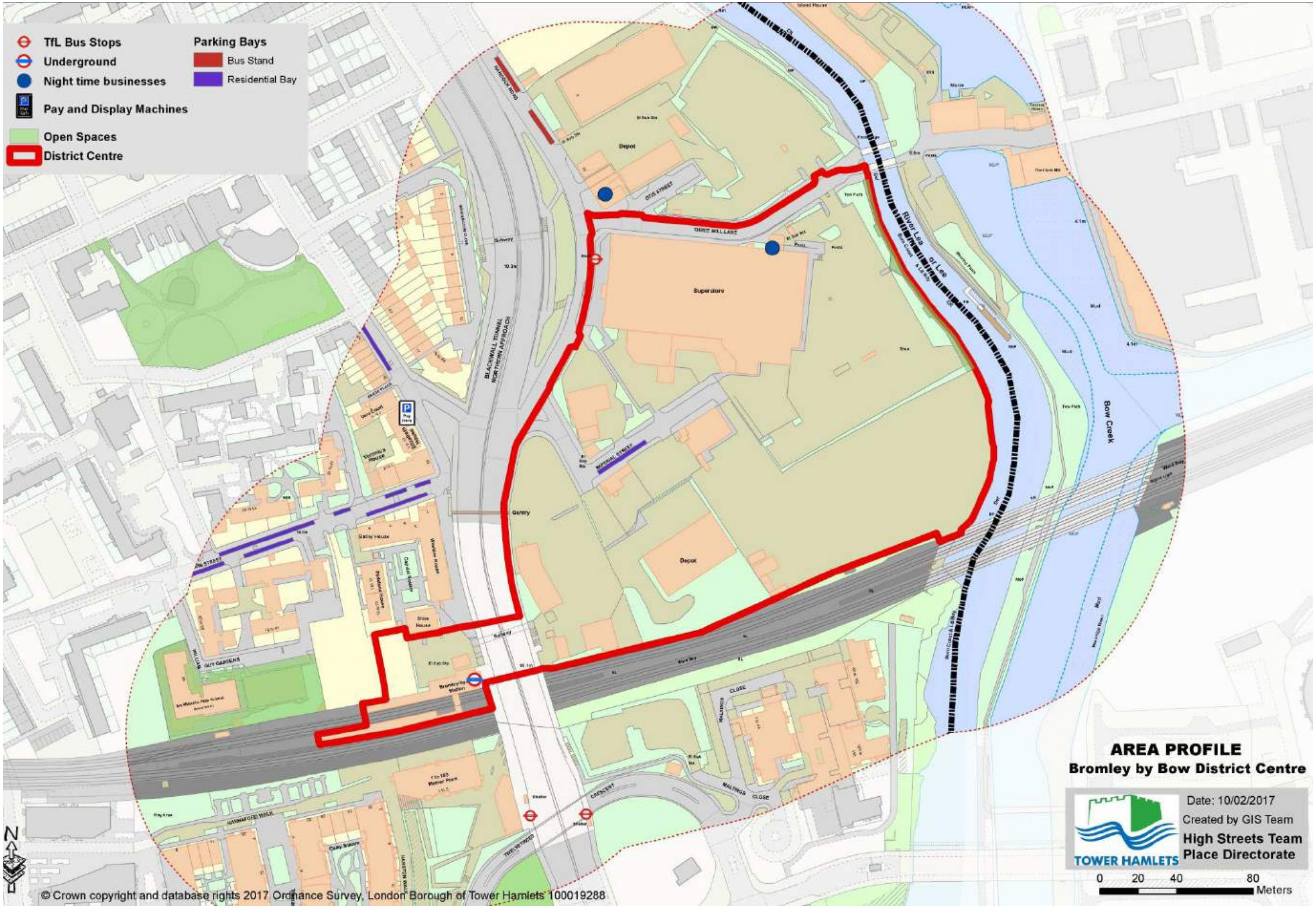
TfL Bus Stops
Underground
Night time businesses
Pay and Display Machines
Open Spaces
District Centre
Parking Bays
Bus Stand
Residential Bay
Superstore
Depot
BLACKWALL TUNNEL NORTHERN APPROACH
River Lea or Lee
Bow Creek
AREA PROFILE
Bromley by Bow District Centre
Date: 10/02/2017
Created by GIS Team
High Streets Team
Place Directorate
TOWER HAMLETS
0 20 40 80
Meters
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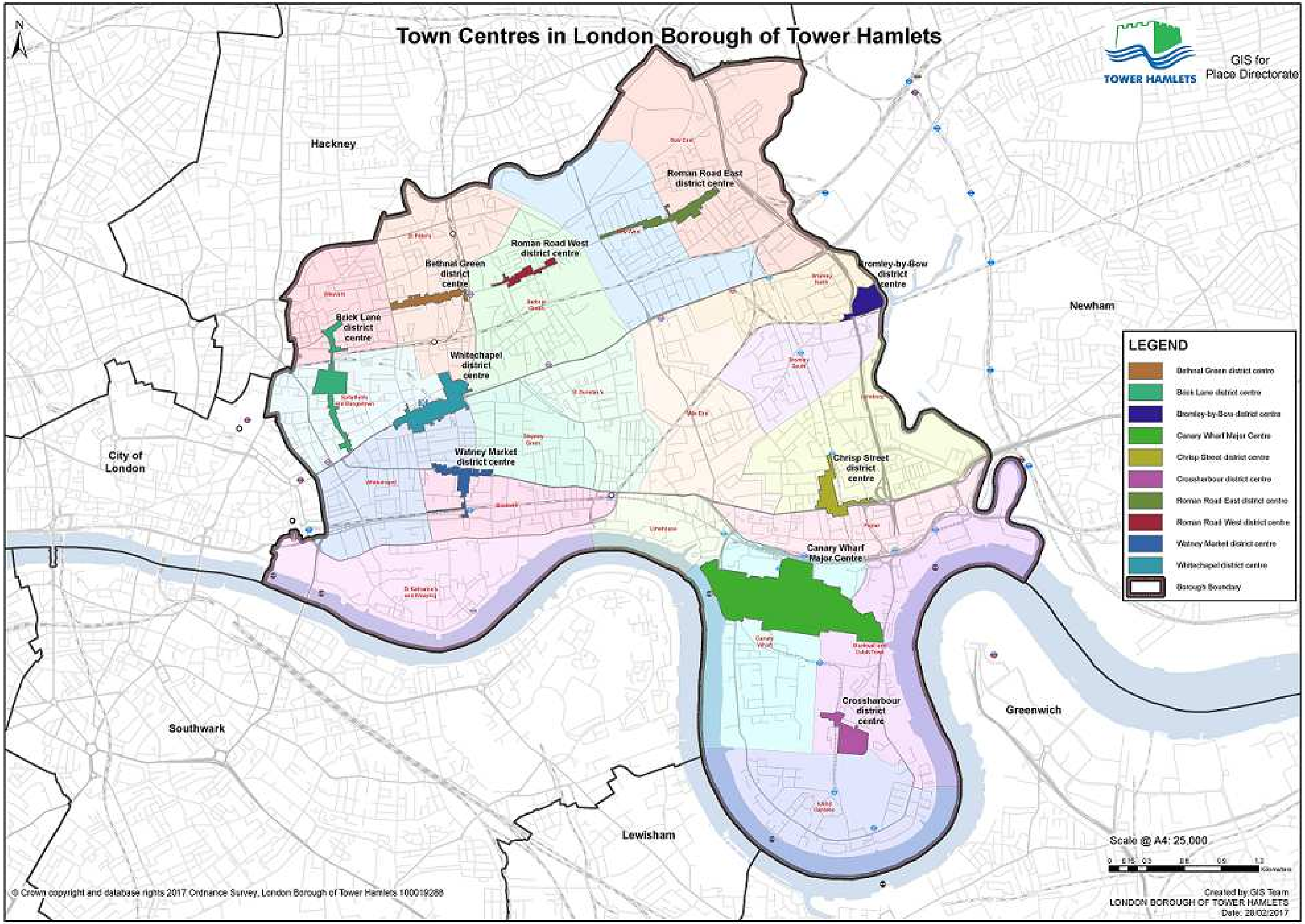
Town Centres in London Borough of Tower Hamlets
GIS for Place Directorate
TOWER HAMLETS
Hackney
City of London
Newham
Southwark
Lewisham
Greenwich
Roman Road East district centre
Roman Road West district centre
Bethnal Green district centre
Bromley-by-Bow district centre
Brick Lane district centre
Whitechapel district centre
Watney Market district centre
Chrisp Street district centre
Canary Wharf Major Centre
Crossharbour district centre
LEGEND
Bethnal Green district centre
Brick Lane district centre
Bromley-by-Bow district centre
Canary Wharf Major Centre
Chrisp Street district centre
Crossharbour district centre
Roman Road East district centre
Roman Road West district centre
Watney Market district centre
Whitechapel district centre
Borough Boundary
Scale @ A4: 25,000
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LONDON BOROUGH OF TOWER HAMLETS
Date: 28/02/2017