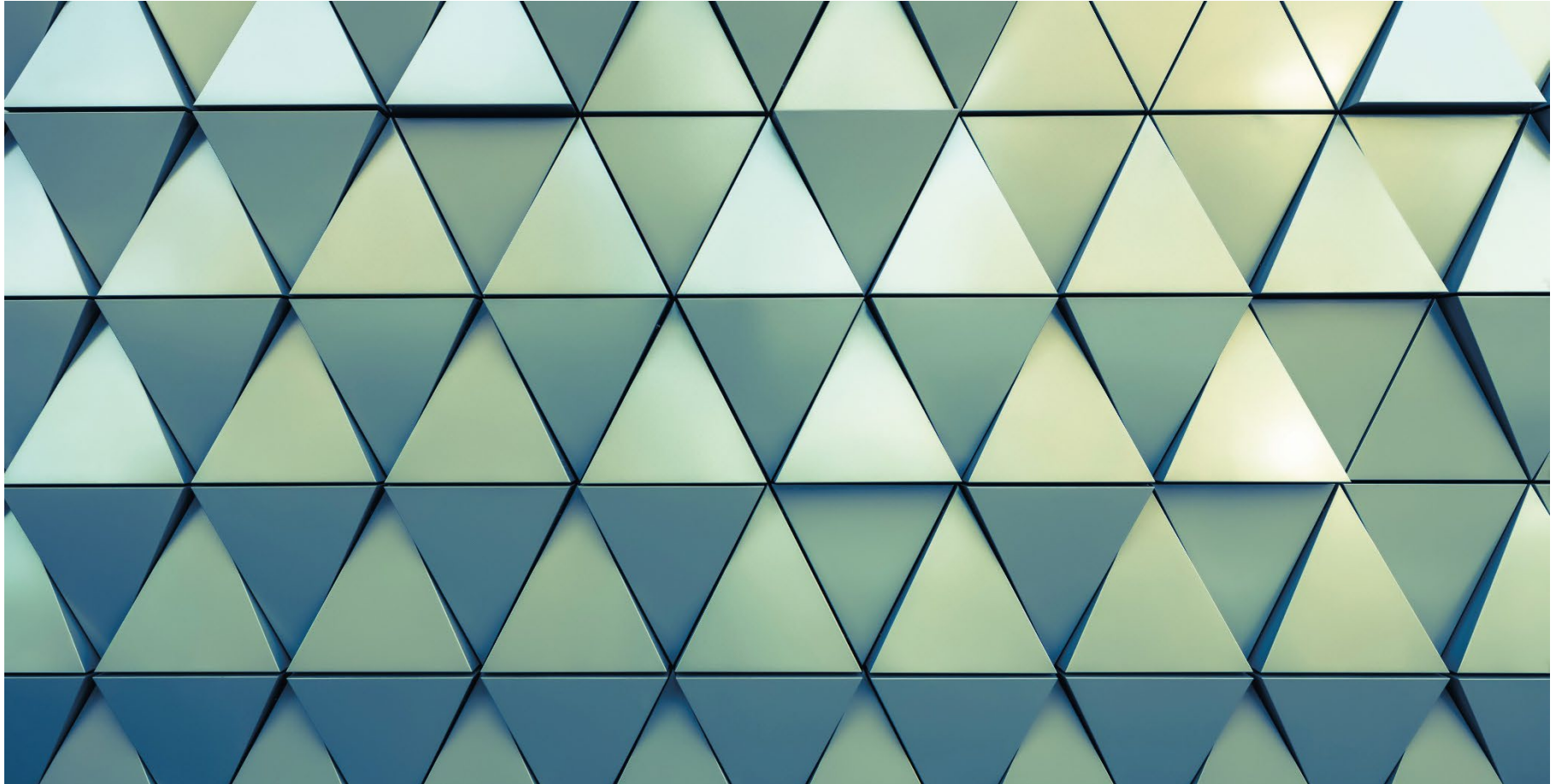


Crawley Borough Council

Retail, Commercial Leisure & Town Centre Neighbourhood Needs Assessment



NEXUS
PLANNING



Introduction

Introduction



- Aims of today:
 - Summarise our role and brief
 - Discuss our initial spatial review of Crawley Town Centre
 - Obtain your views on a range of topics that will help to define our conclusions

Our Brief

What is our Role?



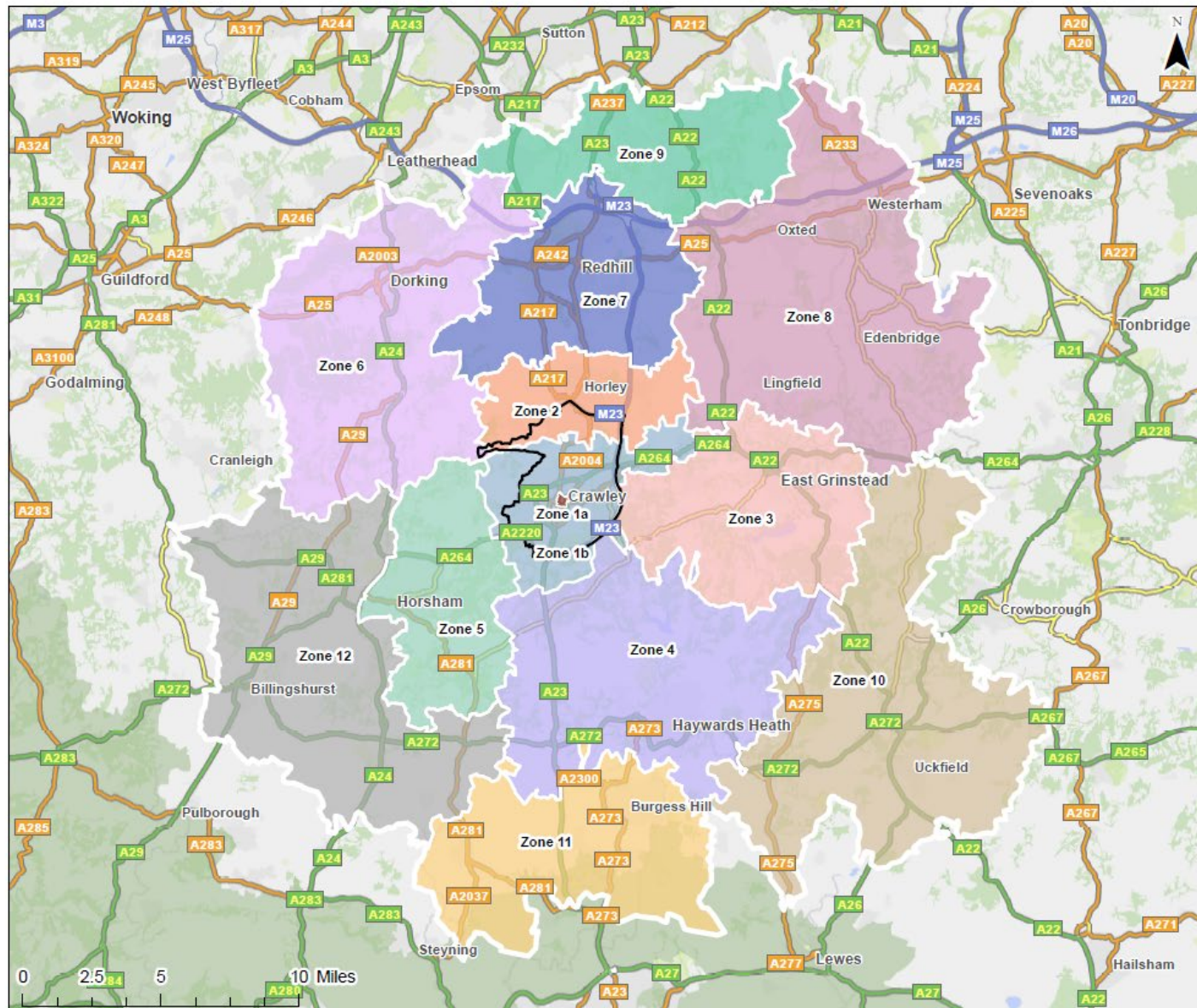
- Nexus Planning was commissioned by Crawley Borough Council in August 2019 to undertake a Retail, Commercial Leisure and Town Centre Neighbourhood Needs Assessment for the Borough.
- Over the past 3 years, we have carried out 20 similar studies for 27 Local Authorities across England, Wales, Northern Ireland and the Republic of Ireland.
- The Study will form part of the evidence base in support of the policies of the emerging Crawley Local Plan Review that will guide development up to 2035.

What is our Brief?

- i. Assess in full the retail (including food and beverage) and commercial leisure need and capacity in Crawley Borough for the Plan period to 2035.
- ii. Make clear policy recommendations to feed into the Local Plan Review, enabling it to best support the growth, diversification and long-term vitality and viability of Crawley Town Centre.
- iii. Assess and advise upon the type and quantum of supporting facilities required to meet the day-to-day needs of a growing Town Centre residential population, considering how any offer might differ from that of Crawley's other neighbourhoods.
 - Analysis of household and door-to-door surveys (1,300 residents)
 - Calculation of residual expenditure availability for convenience retailing, comparison retailing and commercial leisure, projected based on anticipated population growth
 - A quantitative assessment of potential changes to floorspace requirements across the Borough
 - Analysis of retail and commercial leisure trends
 - A qualitative assessment of Crawley Town Centre, neighbourhood centres, boundary and policy recommendations
 - Baseline and 'neighbourhood' assessment of Crawley Town Centre in providing for resident's needs

Crawley Retail, Commercial Leisure and Town Centre Neighbourhood Needs Assessment

Draft Study Area



Legend

- Crawley Borough
- Zone 1a
- Zone 1b
- Zone 2
- Zone 3
- Zone 4
- Zone 5
- Zone 6
- Zone 7
- Zone 8
- Zone 9
- Zone 10
- Zone 11
- Zone 12

N.B. Draft Study Area Zone definitions adapted from the 'Retail Capacity and Impact Study Update' (2013)



Previous Study

Previous Crawley Retail Capacity & Impact Study



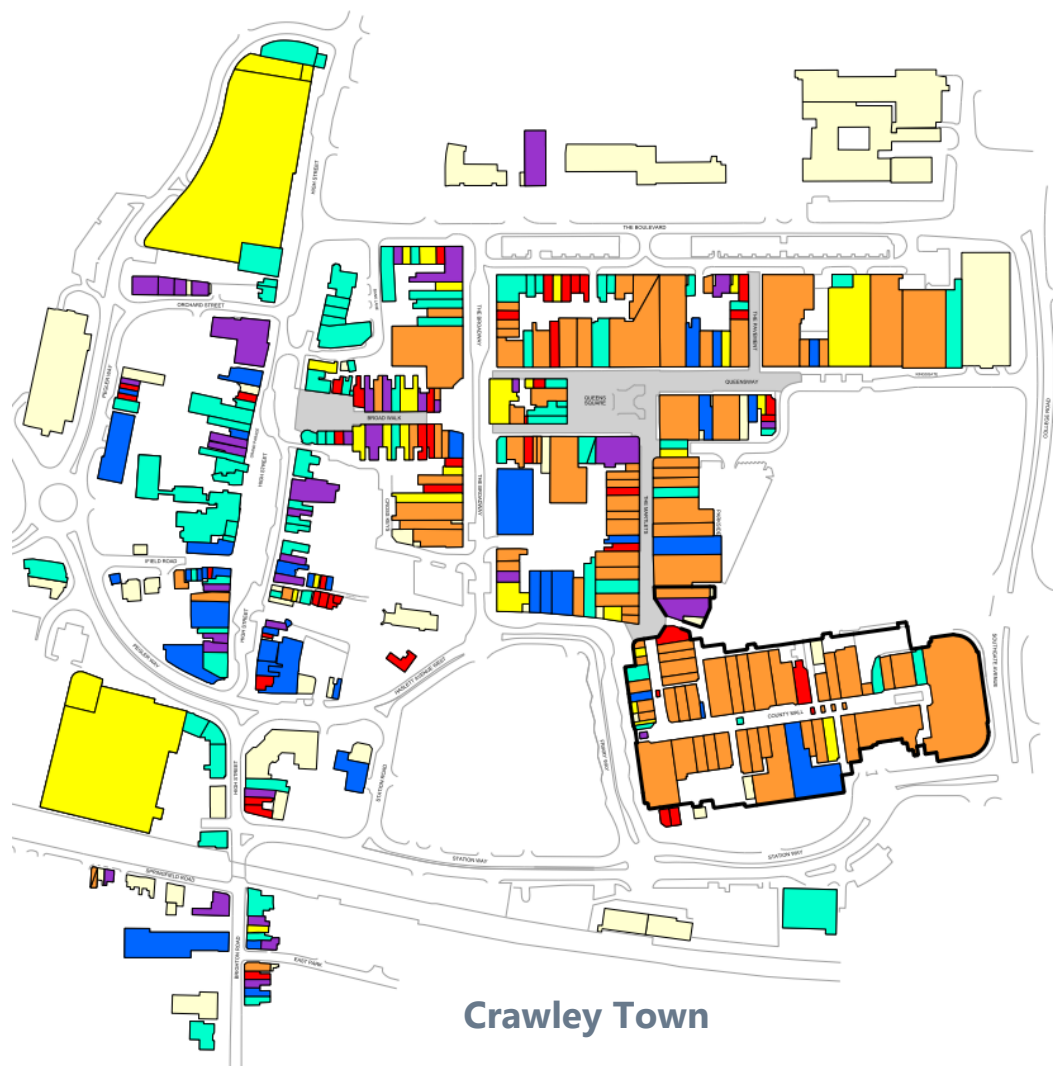
NEXUS
PLANNING

We identify below key findings from the last 'full' Study, prepared by DTZ in 2010:

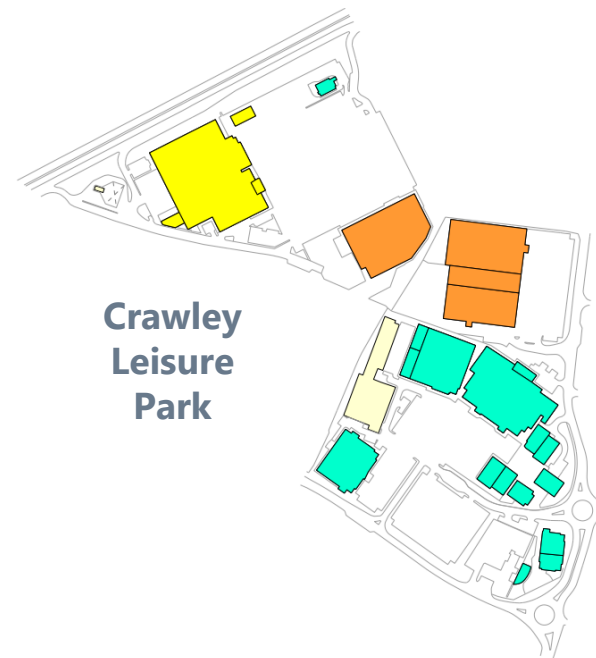
- Crawley Town Centre was considered by DTZ to be **"vital and viable"** as a retail centre
- The Town Centre has a **good range** of shops and services for a town centre of its size.
- Household interview survey data shows that it **attracts expenditure from a wide area**, particularly for comparison goods.
- Shop **vacancy is low** in the primary shopping area, and shops and stores in this area that become available **quickly attract tenants**.
- In terms of **convenience goods floorspace**, and permitted new foodstores, no capacity was identified across the period of 2010 to 2016. Capacity would grow thereafter, reaching about 1,250sq m net by 2026.
- Forecasts show a growing, expenditure capacity for new **comparison goods floorspace** in Crawley Town Centre.
- DTZ considered that this growing capacity would be sufficient to support a **major retail-led mixed-use town centre scheme** over the period 2016 to 2026.
- **Land to the north of the existing primary shopping area** was identified as being the preferred location for future major town centre development.
- Given the **impact of the recession**, however, any new town centre scheme will no longer be of the scale previously envisaged for Town Centre North SPD.

Town Centre Composition

Crawley Town Centre Composition



Crawley Town



Crawley
Leisure
Park



Crawley Town Centre Composition



NEXUS
PLANNING

Crawley	Crawley Units 2010* (%)	Crawley Units 2019 (%)	UK Avg. Units 2019 (%)	Crawley Floorspace 2010 (%)	Crawley Floorspace 2019 (%)	UK Avg. Floorspace 2019 (%)
Convenience	6.5%	8.1%	9.2%	11.0%	18.2%	15.4%
Comparison	46.6%	33.3%	29.7%	64.6%	45.7%	34.0%
Retail Services	10.0%	11.7%	14.9%	3.0%	3.5%	7.0%
Leisure Services*	15.7%	24.2%	24.4%	9.6%	15.5%	25.4%
Financial & Business Services	13.8%	11.5%	10.0%	7.6%	7.3%	7.4%
Other Retail	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
Vacant	7.3%	11.2%	11.6%	4.2%	9.9%	10.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Nexus Planning 2018, DTZ / Experian Goad 2010.

Note: Historic Data sourced from Crawley Retail Capacity & Impact Study 2010.

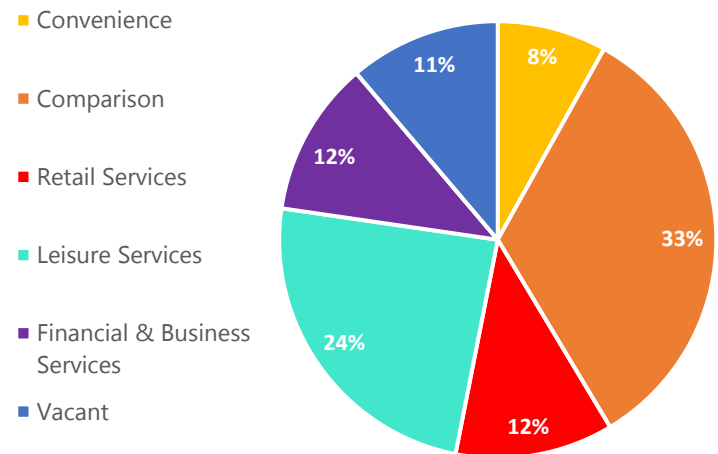
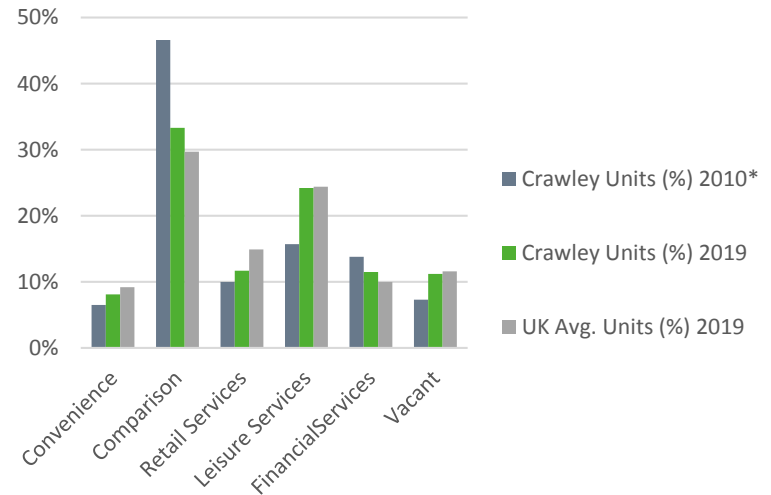
*This 2010 study utilised superseded category definitions for "Food & Drink" and "Leisure & Community Facilities". As such, we have combined these two categories into Leisure Services for the purposes of comparing data.

Crawley Town Centre Observations



NEXUS
PLANNING

- Crawley has experienced an increase in the proportion of **Convenience & Retail Services** since the 2010 Study, but still remains below the UK average.
- Crawley remains above the UK average for **Comparison** and **Financial & Business Services**.
- Crawley's **Leisure Services** have increased markedly since the 2010 Survey, and are generally on par with the UK average. Notwithstanding, these figures don't include the nearby Crawley Leisure Park, which contains a number of additional leisure facilities.
- One notable change to Crawley's Town Centre since 2010 is an increase in the proportion of **Vacant Units**.
- However, Crawley remains below UK average vacancy rates.



Crawley Town Centre Observations



NEXUS
PLANNING

- **Public realm regeneration** works over the last decade have improved the environmental quality of the Town Centre, particularly at Queen's Square.
- Town Centre improvements were ongoing along Queensway at the time of our visit, rendering some parts of the Centre **less accessible**.
- The Town Centre appears to have sufficient **car parking provision**.
- Spatial arrangement, or clusters, of vacant units have the potential to result in poor **environment quality**, which detracts from the success of the Centre as a whole.
- Haslett Avenue West and southern parts of the High Street in particular represent a challenge to the vitality of the Town Centre, given the high **concentration of vacant units**.
- The County Mall was generally well-utilised with considerable **pedestrian footfall** observed.



Next Steps...

Discussion Points



NEXUS
PLANNING

- Areas of interest:

- Overall health of the Town Centre (vitality and viability)
- Any local events in town attracting people to visit
- Views on the evening economy
- Understanding of the public's likes & dislikes
- Vacancies (distribution and turnover of occupiers)
- Composition and mix of stores
- Parking availability and costs
- Quality of the street environment
- Crime & Security
- Recent Council schemes and investment
- Recommendations for alterations to the Town Centre boundary
- Recommendations for development sites

