

# Retail, Commercial Leisure & Town Centre Neighbourhood Needs Assessment

on behalf of Crawley Borough Council

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## Contact

Holmes House  
4 Pear Place  
London  
SE1 8BT

T: 0207 261 4240

E: [info@nexusplanning.co.uk](mailto:info@nexusplanning.co.uk)

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## 1.0 Introduction

### Instruction

- 1.1 Nexus Planning (Nexus) was commissioned by Crawley Borough Council in July 2019 to produce a Retail, Commercial Leisure & Town Centre Neighbourhood Needs Assessment for the Borough. Crawley Borough Council are currently preparing the Local Plan Review for the plan period up to 2035. As such, this 2020 Study will form part of the evidence base upon which the emerging Local Plan Review will be based.
- 1.2 The approach adopted by Nexus has been refined to reflect the latest Government guidance provided in the National Policy Framework (NPPF) (February 2019), and Planning Practise Guidance (PPG).
- 1.3 Accordingly, a fundamental objective of the Study is to produce a NPPF and NPPG compliant Study, which provides the Council with an up-to-date objective assessment of retail and leisure development needs, together with a clear understanding of retail and leisure provision, the health of Crawley Town Centre, it's emerging function as a Neighbourhood for a growing residential population and possible strategic policy responses.
- 1.4 The aims for this Study include the following:

**Stage 1.** Assess in full the retail (including food and beverage) and commercial leisure need and capacity in Crawley Borough for the Plan period to 2035.

- Produce a flexible model for retail expenditure and floorspace projections across the Study Area that will allow up-to-date population figures to be incorporated across the period 2020 to 2035, as well as robust expenditure data and information on relevant committed developments.
- This will also take account of the potential impact of the increase in online shopping (sometime referred to as 'e-tailing') and the wider adoption of omni-channel retailing over the plan period, as well as the projected impacts on consumer confidence, inflation and earnings on both short and long-term consumer spending habits and expenditure that has been 'committed' to approved and planned developments.
- Produce a quantitative assessment of the future demand for retail and commercial leisure floorspace across the authority area over the plan period to 2035. This will establish the expenditure and floorspace capacity of Crawley to meet its identified retail (A1), food and

beverage (A3) and leisure needs in addition to a qualitative review and 'gap analysis' of current retail and commercial leisure provision in the centre to identify whether there are any key uses or specific occupiers not currently represented in Crawley.

**Stage 2.** 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.

- Provide context for the Study through a review of the planning policy position and an appraisal of economic, retail and leisure trends in shopping patterns at a national and regional level and how this might affect the evolution of town centres and future policy recommendations.
- Undertake a comprehensive assessment as to the existing vitality and viability of Crawley Town Centre.
- Benchmark the performance, vitality and viability of the centre within the sub-region and against relevant and comparable town centre locations.
- Review draft policy wording and site allocations to ensure they are fit for purpose and address any deficiencies.

**Stage 3.** 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.

- The suitability of neighbourhood principles to the planned growth of Crawley Town Centre.
- Review of the potential to meet the following identified needs:
  - Local shopping facilities, taking into account the need to differentiate between Crawley Town Centre and the Borough's other neighbourhoods. It will be important for residents to be able to meet their day-to-day needs, without jeopardising the role and function of the Town Centre.
  - Community facilities, including flexible space and places of worship. Whilst there will be a degree of inflow and outflow across the neighbourhoods, such facilities provide a necessary local function for resident events and gatherings as well as a draw to the neighbourhood.
  - Leisure facilities, including cinemas, theatres, gyms, bowling alleys, bingo halls and other main town centre uses, noting that any recommendations should provide consistency with any capacity or need for indoor sport, outdoor sport and open space facilities identified through the Open Space, Sport and Recreation Study. Again, there will be a degree of inflow and outflow across the Borough, and it will be essential to ensure that this does not conflict with Crawley Town centre's sub-regional role.
  - Social infrastructure, such as health, education, and waste recycling facilities will be required to support a growing resident population, in conjunction with existing facilities spread across the Borough's neighbourhoods.

# Stage 1

## Market Share and Capacity

## 2.0 Market Share and Capacity

### Introduction

- 2.1 We begin by identifying below how we assess the current population and available convenience and comparison retail expenditure within the Study Area, as well as the methodology for forecasting the available expenditure across the plan period.
- 2.2 This data has informed our quantitative model of available retail and leisure capacity in the Study Area, along with the NEMS Market Research household telephone and door-to-door surveys. All of our tabulations are set out in full at **Appendix D and E**.

### Household Telephone Survey and Door-to-Door Survey

- 2.3 Household Surveys are recognised across the retail industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure, and why. We utilise the results of a Household Telephone Survey and Door-to-Door Survey to inform our quantitative analysis of the turnover of specific retailers, towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.
- 2.4 It is important to identify a Study Area that covers the key area of interest (in this case, Crawley Borough itself), and is the area within which you would expect the resident population of the Borough to carry out the majority of its retail and leisure spending.
- 2.5 For Crawley Borough, we sought to use a similar Study Area as was used in the 2010 Retail Study, to enable direct comparison. This Study Area is shown on the plan at Figure 2.1 below, and at **Appendix A**.
- 2.6 The Study Area is defined by postal sector geography in order to allow analysis by sub-areas (or 'Zones'), and to allow the market research partner to obtain accurate samples. In this instance, we began with the 12 'Zones' defined within the previous 2010 Study Area. We then sought to separate out Zone 1, into Zone 1a and Zone 1b. Zone 1a covers the Town Centre, whilst Zone 1b covers the remaining part of the 2010 Study's Zone 1, and broadly comprises the extent of Crawley Borough.

Figure 2.1 | Survey Area Zones

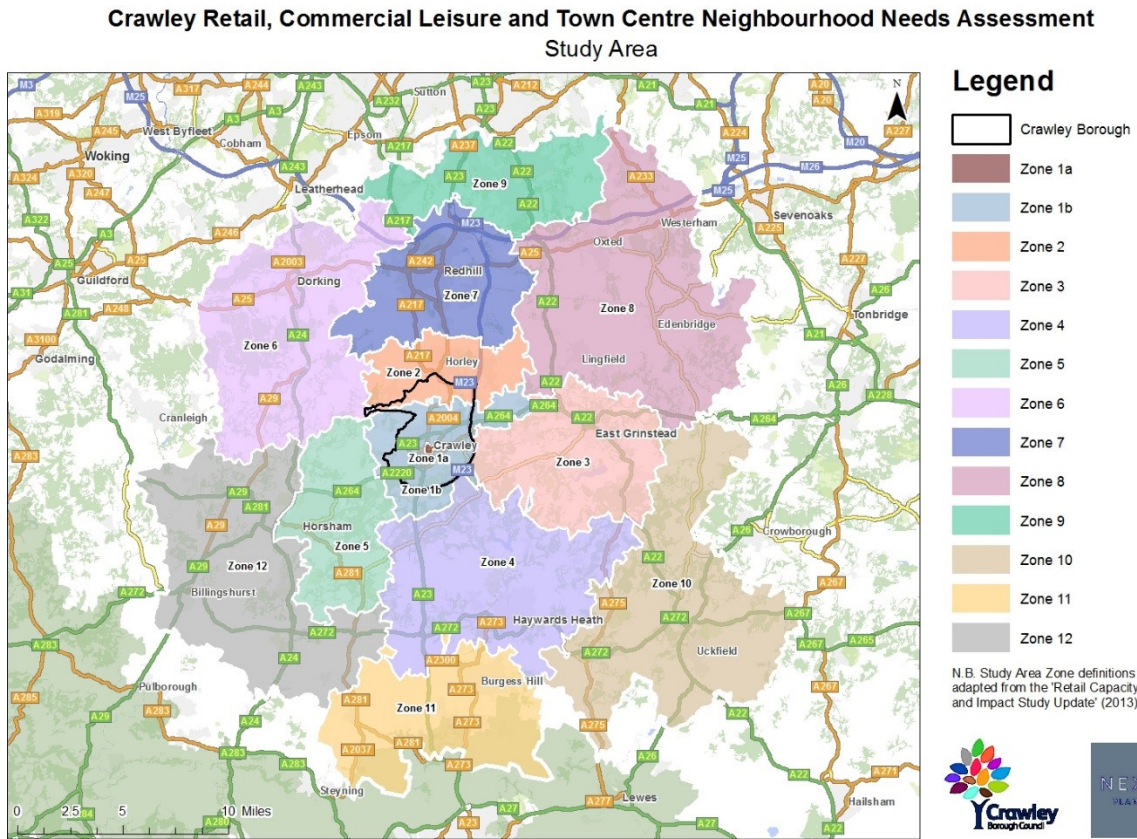


Figure 2.2 | Definitions of Survey Area Zones

Zone	Postal Sectors
<b>1a</b>	RH10 1 (partial to match Town Centre Boundary)
<b>1b</b>	RH10 1 (partial beyond Town Centre Boundary), RH10 3, RH10 5, RH10 6, RH10 7, RH10 8, RH10 9, RH10 0, RH11 6, RH11 7, RH11 8, RH11 9, RH11 0, RH12 0, RH77 1
<b>2</b>	RH6 7, RH6 8, RH6 9, RH6 0
<b>3</b>	RH10 4, RH18 5, RH19 1, RH19 2, RH19 3, RH19 4
<b>4</b>	RH16 1, RH16 2, RH16 3, RH16 4, RH17 5, RH17 6, RH17 7
<b>5</b>	RH12 1, RH12 2, RH12 4, RH12 5, RH13 5, RH13 6
<b>6</b>	RH3 7, RH4 1, RH4 2, RH4 3, RH5 4, RH5 5, RH5 6, KT20 7
<b>7</b>	RH1 1, RH1 2, RH1 3, RH1 4, RH1 5, RH1 6, RH2 7, RH2 8, RH2 9, RH2 0
<b>8</b>	RH7 6, RH8 9, RH8 0, RH9 8, TN8 5, TN8 6, TN8 7, TN16 1, TN16 2, TN16 3
<b>9</b>	CR3 5, CR3 6, CR3 7, CR3 0, CR5 1, CR5 2, CR5 3, CR6 9, CR8 4, CR8 5, KT20 5, KT20 6
<b>10</b>	BN8 4, TN7 4, TN22 1, TN22 2, TN22 3, TN22 4, TN22 5
<b>11</b>	BN5 9, BN6 8, BN6 9, RH15 8, RH15 9, RH15 0
<b>12</b>	RH12 3, RH13 8, RH13 9, RH13 0, RH14 9

Study Area Zone definitions adapted from 'Retail Capacity and Impact Study Update (2013)'



- 2.7 The full Survey Area extends beyond Crawley's boundary though, in order to ensure that we get an understanding of any inflow of trade from residents in nearby areas beyond the Borough. Zones 2-12 therefore cover the surrounding area around Crawley. We are also mindful of the potential for inflows of trade from outside the Study Area. We therefore make suitable allowances for these potential flows of trade in our assessment.
- 2.8 Accordingly, we instructed NEMS Market Research to conduct a Household Telephone Survey of 1,209 representative households across the Study Area in August 2019. We also instructed NEMS Market Research to conduct a Door-to-Door Survey of 49 representative households within Zone 1a, to capture the specific behaviours and beliefs of Town Centre residents. The results of these surveys are contained at **Appendix C**. At the beginning of NEMS Market Research's report is a full description of the research methodology, sampling size, weightings and sample profiles. Having worked with NEMS on more than 30 similar studies over the past few years, we are content that their methodology is robust in the eyes of a range of Inspectors at EIP and provides an accurate snapshot of market share information at the point of survey. NEMS quote this as being to a 95% confidence range.

## Study Area Population

- 2.9 The Study Area Zones cut across local authority areas, with some zones falling outside Crawley Borough. Where a Zone incorporates a neighbouring authority area, there is a need to sub-divide the Zone in order to account for growth both inside and outside the authority area.
- 2.10 Within the boundaries of Crawley Borough, we have considered two alternative population growth scenarios. In order to apportion Crawley's future population growth in an appropriate manner across both scenarios, we have taken the base assumption from the Local Plan Review that 3,000 residential units will come forward in the Town Centre over the plan period to 2035. Our modelling reflects the relatively unique demographics of a Town Centre resident population, adopting a housing density of 2.1 people per household, derived from 2011 Census data.
- 2.11 The first (**Scenario 1**) incorporates a model of the uncapped local housing need figures using the standard method, provided by the Council's Strategic Housing Market Assessment (SHMA) prepared by Icen. The second approach (**Scenario 2**) takes into account Crawley's constrained land supply, utilising supply-based population growth of 451 dpa (dwellings per annum) to 2024/25, and 255 dpa

thereafter, in line with the current provision planned for in the draft Local Plan Review (draft Strategy Policy H1) to 2035. Both of these Scenarios are projected forward from the same SHMA derived base at 2019, giving different population forecasts for the Borough from 2020 onwards. Population growth (and available expenditure) has been considered at five-year reporting intervals working back from 2035.

2.12 For areas outside Crawley Borough, the base population has been calculated using Experian Micromarketer G3 data (2017 estimate, which was issued in December 2018) and projected forward using Experian’s population forecasts. Experian’s methodology in calculating projected changes in population is based on a ‘demographic component model’, which takes into consideration birth and death rates, and net migration; utilising the 2017 mid-year ONS estimates for the postal sector geography of the Study Area. We set out below our assumed population across both growth scenarios below at Figure 2.3.

**Figure 2.3 | Estimated Population Growth across the Study Area**

Study Area Zones	Population in Crawley Borough Scenario 1			Population in Crawley Borough Scenario 2			Population Outside Crawley Borough		
	2020	2035	Growth	2020	2035	Growth	2020	2035	Growth
1a	1,349	6,212	<b>4,863</b>	1,459	6,212	<b>4,753</b>	0	0	-
1b	113,914	132,934	<b>19,020</b>	113,621	124,643	<b>11,022</b>	8,671	9,711	<b>1,040</b>
<b>1</b>	<b>115,263</b>	<b>139,146</b>	<b>23,883</b>	<b>115,080</b>	<b>130,855</b>	<b>15,775</b>	<b>8,671</b>	<b>9,711</b>	<b>1,040</b>
2	307	356	<b>49</b>	307	324	<b>17</b>	33,752	39,095	<b>5,343</b>
3	76	88	<b>12</b>	76	82	<b>6</b>	49,757	55,369	<b>5,612</b>
4	0	0	-	0	0	-	59,269	66,359	<b>7,090</b>
5	0	0	-	0	0	-	57,579	63,480	<b>5,901</b>
6	0	0	-	0	0	-	44,107	48,741	<b>4,634</b>
7	0	0	-	0	0	-	80,903	93,564	<b>12,661</b>
8	0	0	-	0	0	-	67,460	76,725	<b>9,265</b>
9	0	0	-	0	0	-	106,161	121,336	<b>15,175</b>
10	0	0	-	0	0	-	38,776	44,974	<b>6,198</b>
11	0	0	-	0	0	-	62,126	68,900	<b>6,774</b>
12	0	0	-	0	0	-	42,931	47,861	<b>4,930</b>
<b>Total</b>	<b>115,646</b>	<b>139,590</b>	<b>23,944</b>	<b>115,463</b>	<b>131,261</b>	<b>15,798</b>	<b>651,492</b>	<b>736,115</b>	<b>84,623</b>

Note: Population at 2018 derived from Experian MMG3 data; Scenario 1 growth in Crawley Borough is derived from the SHMA; Scenario 2 growth in Crawley Borough based on the methodology set out at Section 2 of this report (any minor variation is down to rounding); growth outside Warrington is based on Experian growth forecasts

2.13 As referenced above, we consider the combined Zone 1 to broadly equate to Crawley Borough for the purposes of this Study going forward. The projections show increases in population of 20.7% (Scenario 1) and 13.7% (Scenario 2) within Zone 1 over the period 2020-2035, and 13.0% across the rest of the Study Area over the same period, as set out below at Figures 2.4 and 2.5.

**Figure 2.4 | Study Area Population by Survey Zone (Scenario 1)**

Zones	2020	2025	2030	2035
Zone 1a	1,349	2,978	4,561	6,212
Zone 1b	122,585	129,364	135,877	142,645
<b>Zone 1</b>	<b>123,934</b>	<b>132,342</b>	<b>140,438</b>	<b>148,856</b>
Zone 2	34,059	36,014	37,782	39,451
Zone 3	49,833	51,893	53,754	55,457
Zone 4	59,269	61,928	64,283	66,359
Zone 5	57,579	59,701	61,634	63,480
Zone 6	44,107	45,758	47,292	48,741
Zone 7	80,903	85,720	89,885	93,564
Zone 8	67,460	70,866	73,935	76,725
Zone 9	106,161	111,551	116,543	121,336
Zone 10	38,776	41,042	43,087	44,974
Zone 11	62,126	64,597	66,790	68,900
Zone 12	42,931	44,628	46,269	47,861
<b>Study Area Total</b>	<b>767,138</b>	<b>806,039</b>	<b>841,692</b>	<b>875,703</b>

Source: Appendix D, Table 1

**Figure 2.5 | Study Area Population by Survey Zone (Scenario 2)**

Zones	2020	2025	2030	2035
Zone 1a	1,459	3,718	4,976	6,212
Zone 1b	122,292	127,937	131,175	134,354
<b>Zone 1</b>	<b>123,751</b>	<b>131,655</b>	<b>136,150</b>	<b>140,565</b>
Zone 2	34,059	36,010	37,770	39,430
Zone 3	49,833	51,892	53,751	55,451
Zone 4	59,269	61,928	64,283	66,359
Zone 5	57,579	59,701	61,634	63,480
Zone 6	44,107	45,758	47,292	48,741
Zone 7	80,903	85,720	89,885	93,564
Zone 8	67,460	70,866	73,935	76,725
Zone 9	106,161	111,551	116,543	121,336
Zone 10	38,776	41,042	43,087	44,974
Zone 11	62,126	64,597	66,790	68,900
Zone 12	42,931	44,628	46,269	47,861
<b>Study Area Total</b>	<b>766,955</b>	<b>805,348</b>	<b>837,389</b>	<b>867,386</b>

Source: Appendix E, Table 1

## Retail Expenditure Forecasts

- 2.14 Retail expenditure data (in the form of convenience and comparison goods expenditure per capita) has been sourced from our in-house Experian MicroMarketer G3 system.
- 2.15 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry. Expenditure data from Experian

is provided in 2017 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 16 (December 2018).

2.16 As identified in Figure 2.6 below, Experian forecasts suggest that convenience goods expenditure will grow by just 1.3% in 2018, falling over the next few years to a very conservative 0.1% per annum over the period 2020-2029. This is largely as a result of a trend towards more price conscious shopping patterns and the growth of high street discounters such as Lidl and Aldi, as discussed in further detail in Section 3.

**Figure 2.6 | Experian Retail Expenditure Forecasts**

Year	Convenience growth rates	Comparison growth rates
2017	1.3%	5.5%
2018	1.0%	2.8%
2019	0.5%	2.6%
2020	0.1%	2.8%
2021	0.1%	3.3%
2022	0.1%	3.3%
2023	0.1%	3.3%
2024	0.1%	3.3%
2025	0.1%	3.3%
2026	0.1%	3.2%
2027	0.1%	3.2%
2028	0.1%	3.2%
2029	0.1%	3.2%
2030	0.1%	3.2%
2031	0.1%	3.2%
2032	0.1%	3.2%
2033	0.1%	3.2%
2034	0.1%	3.2%
2035	0.1%	3.2%

Source: Table 1a, Experian Retail Planner Briefing Note 16, December 2018

2.17 Comparison expenditure is shown to have risen by 5.5% in 2017, before falling to a growth rate of 2.8% in 2018 and 2.6% in 2019. Experian then forecast a levelling off of steady growth at 3.3%-3.2% per annum over the period 2021-2035, as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.

2.18 Experian note that long-term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can influence the broader national economy. These forecasts relate only to the growth in expenditure at 'bricks and mortar' premises. We deal separately with the internet (or 'special forms of trading') below.

## Non-Store Retailing or Special Forms of Trading

2.19 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies and are discussed in detail in 'Growth in E-Tailing (or E-Commerce)' in Section 3.

2.20 Experian Retail Planner Briefing Note 16 (December 2018) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents suggest is made by SFT and instead utilise Experian's forecasts. This ensures that the proportion of SFT accounted for in our modelling increases in line with Experian forecasts, as opposed to remaining constant.

2.21 Many stores offer online sales, but source goods from regular stores' stock, as is often the case for foodstores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans at each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' Figures, cited below at Figure 2.7, which make an allowance for these online sales derived from individual stores to ensure that the expenditure is counted as 'available' spend within the Study Area.

**Figure 2.7 | 'Adjusted' Special Forms of Trading Market Share Forecasts**

Year	Adjusted Convenience SFT	Adjusted Comparison SFT
2020	4.3%	18.6%
2025	5.0%	20.7%
2030	5.5%	21.4%
2035	5.8%	21.7%

Source: Experian Retail Planner Briefing Note 16, December 2018, Appendix 3

## Convenience Goods Expenditure

2.22 We then project forward available expenditure per capita and population growth for each survey Zone in 2020, 2025, 2030 and 2035, in order to estimate the total available convenience goods expenditure under each growth scenario.

2.23 In Figures 2.8 and 2.9 we consider the convenience goods expenditure generated by residents of Crawley (being Zone 1) and across the whole Study Area.

**Figure 2.8 | Total Available Convenience Goods Expenditure (Scenario 1)**

	2020	2025	2030	2035	Growth 2020-2035
Zone 1 (Crawley)	£271.4m	£289.2m	£306.9m	£325.9m	<b>£54.5m</b>
Study Area	£1,854.2m	£1,943.1m	£2,027.9m	£2,113.0m	<b>£258.7m</b>

Source: Appendix D, Table 2a

**Figure 2.9 | Total Available Convenience Goods Expenditure (Scenario 2)**

	2020	2025	2030	2035	Growth 2020-2035
Zone 1 (Crawley)	£271.0m	£287.7m	£297.5m	£307.7m	<b>£36.7m</b>
Study Area	£1,853.8m	£1,941.6m	£2,018.5m	£2,094.8m	<b>£240.9m</b>

Source: Appendix E, Table 2a

2.24 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with 75% of spending attributed to main food shopping trips and 25% attributed to 'top-up' shopping trips.

## Comparison Goods Expenditure

2.25 Experian provides comparison goods expenditure divided into eight sub-categories to allow for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.

**Figure 2.10 | Total Available Comparison Goods Expenditure (Scenario 1)**

Area	2020	2025	2030	2035	Growth 2020-2035
Zone 1 (Crawley)	£411.2m	£503.3m	£619.9m	£766.4m	<b>£355.2m</b>
Study Area	£3,085.4m	£3,567.1m	£4,495.6m	£5,450.8m	<b>£2,365.4m</b>

Source: Appendix D, Table 2a

**Figure 2.11 | Total Available Comparison Goods Expenditure (Scenario 2)**

Area	2020	2025	2030	2035	Growth 2020-2035
Zone 1 (Crawley)	£410.6m	£500.8m	£297.5m	£307.7m	<b>£313.2m</b>
Study Area	£3,084.8m	£3,565.2m	£2,018.5m	£2,094.8m	<b>£2,323.2m</b>

Source: Appendix E, Table 2a

- 2.26 Applying the increases in population and comparison goods expenditure per capita, Figures 2.10 and 2.11 estimate that Crawley will experience increases in spend of between £355.2m (under Scenario 1) and £313.2m (Scenario 2) over the period 2020-2035. Spending across the Study Area will grow from between £2,365.4m and 2,323.2m over the same period.

## Convenience Goods Findings

- 2.27 Our base population and expenditure data is then utilised, in conjunction with our analysis of the market shares of retailers across the Study Area, to inform our analysis of retail and leisure expenditure capacity.

### Market Shares

- 2.28 Before considering the capacity for new convenience goods floorspace, we firstly examine below the market shares achieved by key individual stores and locations, as well as the Borough and Study Area as a whole.
- 2.29 As previously referenced, for the purposes of the ensuing analysis, we define the Crawley Borough Council area, as Zones 1a-1b (combined as Zone 1).

**Figure 2.12 | Convenience Goods - Market Share by Store**

Destination	Market Share		Turnover (from Study Area)	
	Study Area	Crawley Residents	Scenario 1	Scenario 2
<b>Morrisons, Pegler Way, Crawley*</b>	<b>2.2%</b>	<b>11.9%</b>	<b>£40.9m</b>	<b>£40.9m</b>
<b>Crawley Town Centre</b>	<b>0.5%</b>	<b>1.9%</b>	<b>£9.3m</b>	<b>£9.3m</b>
<b>Crawley Town Centre Sub-Total</b>	<b>2.7%</b>	<b>13.8%</b>	<b>£50.2m</b>	<b>£50.2m</b>
Tesco Extra, Hazelwick Avenue, Crawley	4.6%	27.6%	£85.5m	£85.3m
Sainsbury's Superstore, Crawley Avenue, Crawley	2.7%	14.4%	£50.9m	£50.8m
Asda, Pegler Way, Crawley	2.1%	12.7%	£39.0m	£39.1m
Aldi, Acorn Retail Park, Betts Way, Crawley	1.5%	3.7%	£27.8m	£27.8m
Lidl, Hazelwick Avenue, Crawley	0.9%	3.5%	£17.3m	£17.3m
<b>Neighbourhood Centre Stores</b>	<b>1.9%</b>	<b>11.9%</b>	<b>£34.7m</b>	<b>£34.7m</b>
<i>Others in Crawley Borough</i>	<i>1.3%</i>	<i>17.6%</i>	<i>£23.2m</i>	<i>£23.2m</i>
<b>Crawley Borough Sub-Total</b>	<b>17.7%</b>	<b>93.3%</b>	<b>£328.6m</b>	<b>£328.2m</b>
<i>Others in the Study Area</i>	<i>75.1%</i>	<i>5.9%</i>	<i>£1,392.2m</i>	<i>£1,392.2m</i>
<b>Study Area Sub-Total</b>	<b>92.8%</b>	<b>99.2%</b>	<b>£1,720.8m</b>	<b>£1,720.4m</b>
<i>Others outside the Study Area</i>	<i>7.2%</i>	<i>0.8%</i>	<i>£133.5m</i>	<i>£133.5m</i>
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>£1,854.3m</b>	<b>£1,853.9m</b>

\* Note: Morrisons, Pegler Way has ceased operating and closed since the completion of the Household Telephone Survey.

Source: Appendix D & E, Tables 3 and 4 (may not add due to rounding)

- 2.30 Figure 2.12 sets out where Crawley residents carry out their convenience goods spending. 93.3% of all of Crawley's residents spending is carried out within the Borough, which is often termed as the 'retention rate'.
- 2.31 Of that spending, it is clear that a small number of large stores are very dominant, with the four largest foodstores attracting two thirds of all such spending (66.6%). Notably, only one of these foodstores are found in the Town Centre (Morrisons, Pegler Way, which has since ceased trading). Asda, Pegler Way is located edge-of-centre<sup>1</sup>, whilst Sainsbury's, Crawley Avenue and Tesco, Hazelwick Avenue are outside of Crawley Town Centre. In addition, two discount foodstores (Aldi, Acorn Retail Park and Lidl, Hazelwick Avenue) attract a notable proportion of spending given their relative scale and offer, reflecting the trend towards stores of this nature observed across the Country over the last few years.
- 2.32 Facilities within the Borough's Neighbourhood Centres were found to attract a not insignificant 11.9% of convenience goods spending by Crawley residents, demonstrating the value of these local facilities.
- 2.33 With only 5.9% of residents' convenience goods spending 'leaking' to destinations outside of Crawley,

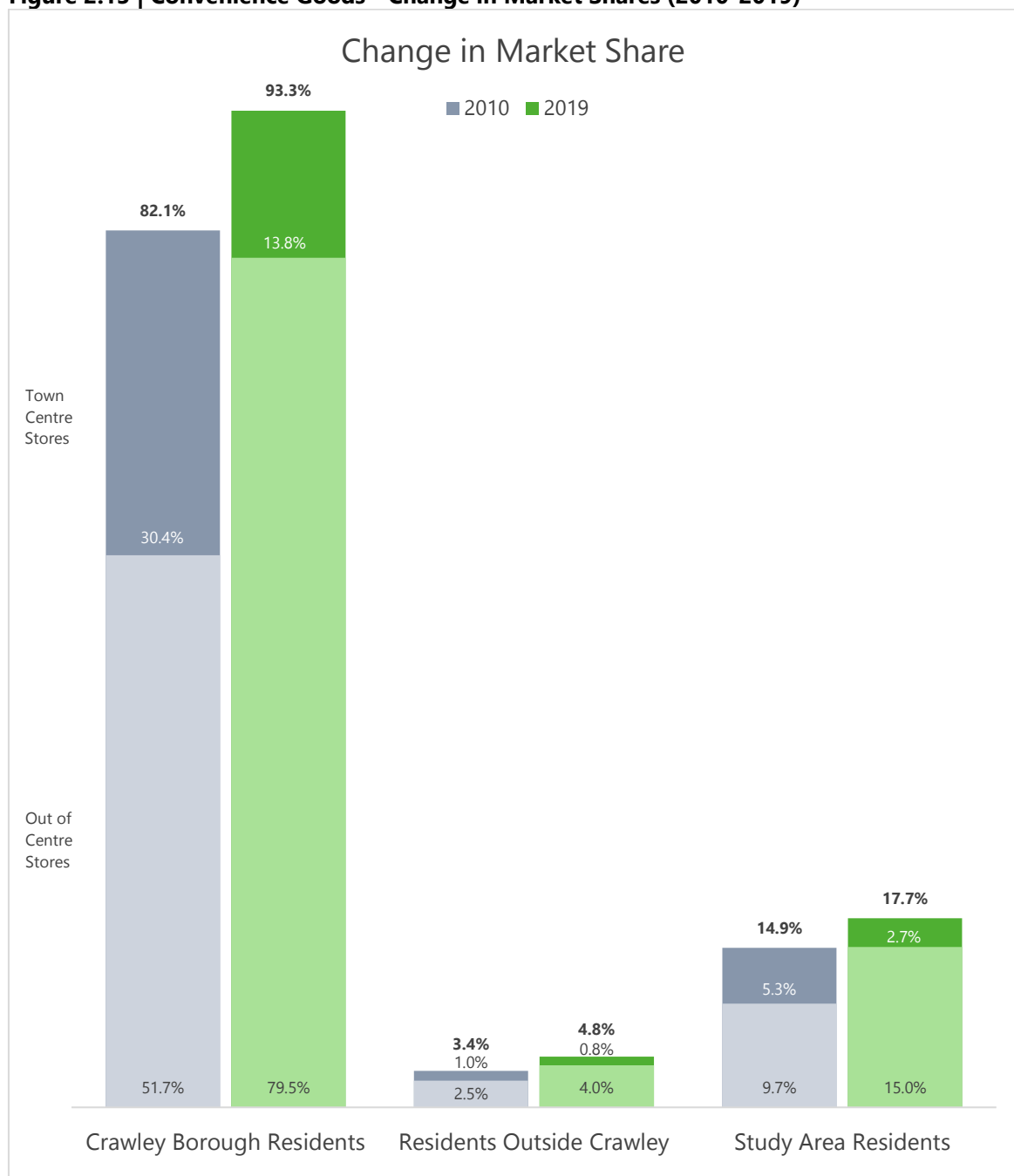
<sup>1</sup> In retail terms, this is defined within the NPPF as a store that is well connected to, and up to 300 metres from, the primary shopping area. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.



it is clear that there is no significant need for residents to trip farther afield for their convenience goods shopping.

2.34 Having sourced the underlying market share data that informed the previous 2010 Study, we recreated the previous quantitative model in order to fully assess the changes in shopping patterns.

**Figure 2.13 | Convenience Goods - Change in Market Shares (2010-2019)**



Source: Appendix D & E, Tables 3 and 4 / Retail Capacity and Impact Study Update (2013), Appendix B, Scenario 1, Table 6

- 2.35 As shown in Figure 2.13, the proportion of Crawley resident's convenience goods spending in Crawley grew from 82.1% in 2010 to 93.3% in 2019. However, it is notable that the proportion of spending to facilities in the Town Centre over that period actually fell significantly from 30.4% to 13.8%, whilst out of centre convenience spending grew from 51.7% to 79.5%.
- 2.36 A similar pattern emerges for Study Area residents located outside of Crawley Borough, with an increase in spending to stores within Crawley, but outside of the Town Centre responsible for the increase in overall convenience spend to Crawley.

**Figure 2.14 | Convenience Goods – Turnover Benchmarking (Scenario 1)**

Destination	Benchmark Turnover (£m)	Store Turnover (from Study Area)	
		Survey Turnover (£m)	Over / Under Trading (%)
<b>Morrisons, Pegler Way, Crawley</b>	<b>£36.0m</b>	<b>£40.9m</b>	<b>13.5%</b>
<b>Others in Crawley</b>	<b>£27.4m</b>	<b>£9.3m</b>	<b>-66.2%</b>
<b>Crawley Town Centre Sub-Total</b>	<b>£63.4m</b>	<b>£50.2m</b>	<b>-20.9%</b>
Tesco Extra, Hazelwick Avenue, Crawley	£77.1m	£85.5m	10.8%
Sainsbury's Superstore, Crawley Avenue, Crawley	£47.7m	£50.9m	6.5%
Asda, Pegler Way, Crawley	£42.6m	£39.0m	-8.4%
Aldi, Acorn Retail Park, Betts Way, Crawley	£10.4m	£27.8m	166.6%
Lidl, Hazelwick Avenue, Crawley	£5.3m	£17.3m	224.3%
<b>Neighbourhood Centre Stores</b>	<b>£22.4m</b>	<b>£34.7m</b>	<b>55.3%</b>
<i>Others in Crawley Borough</i>	<i>£22.4m</i>	<i>£23.2m</i>	<i>3.9%</i>
<b>Rest of Crawley Borough Sub-Total</b>	<b>£228.0m</b>	<b>£278.4m</b>	<b>22.1%</b>
<b>Crawley Borough Total</b>	<b>£291.4m</b>	<b>£328.6m</b>	<b>12.7%</b>

Source: Appendix D & E, Table 5

- 2.37 Turning to individual retail destinations, it is noted that almost all foodstores located within the Town Centre are found to be under-trading compared to company benchmarks, as set out at Figure 2.14. The notable exception to this trend is Morrisons at Pegler Way; however, during the course of conducting this Study, the company announced their intention to close the store less than 5 years after opening. Whilst our modelling estimated that the store was trading above company averages at the time of the Household Survey, the company statement that the store was 'currently unviable' suggests that the costs associated with running the store were higher than the average across the supermarket's portfolio<sup>2</sup>. In the circumstances, we would anticipate that, in the short-term, trade from Morrisons would primarily be redirected to large format foodstores in close proximity to the centre,

<sup>2</sup> Article headlined 'Major supermarket to close 'unviable' Crawley town centre store', West Sussex County Times, 22 August 2019

such as Asda, Pegler Way and Sainsbury's Superstore, Crawley Avenue on the basis of the like-for-like principle. A proportion may also be retained by convenience retailers in the Town Centre for smaller basket top-up spending. Over the longer term, we would anticipate that a smaller format retailer would move to the Town Centre (potentially within the footprint of the former Morrisons building) to meet this qualitative gap.

- 2.38 Outside of the Town Centre, stores are found to be over-trading above company expectations; the attraction of these out of centre stores partially explains the under-performance of Town Centre stores.
- 2.39 It is also notable that, collectively, stores located in the Borough's Neighbourhood Centres are found to be over-trading, further demonstrating the service that these local facilities continue to provide for more day-to-day convenience goods trips.

### Convenience Retail Capacity

- 2.40 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2035. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Section 3, one such example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 2.41 Importantly, we also note that any identified quantitative retail capacity across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with NPPF and PPG policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection.
- 2.42 Equally, as we will go on to examine in our policy recommendations, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.
- 2.43 Detailed quantitative retail capacity tables for each population Scenario are enclosed at **Appendix D**

**and E.**

2.44 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

**Available Expenditure (£m) - Turnover of existing & proposed (£m) = Surplus or Deficit (£m)**

2.45 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.

2.46 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports, and Mintel Retail Rankings, provide average (or benchmark) sales densities for all national multiple retailers.

2.47 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

2.48 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Tesco, Asda, Sainsbury's and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.

2.49 Turning now to our detailed findings for Crawley, as detailed in Figure 2.12 above, the Household Survey results show that the Borough Council area has a 93.3% convenience goods market share of all spending carried out by residents of Zone 1 (which broadly relates to Crawley Borough), and a market share of 17.7% of residents across the Study Area.

- 2.50 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest Household Survey (i.e. that stores across the authority area will continue to draw 17.7% of all convenience goods spending from the Study Area). We consider maintaining a constant market share a sensible basis for analysis because whilst there is planned population growth and committed developments inside Crawley, we would expect a range of competing centres such as Horsham, Horley and East Grinstead (amongst others), to continue to exert a pull on residents of the hinterlands surrounding Crawley. We expect the two factors to broadly even each other out.
- 2.51 In coming to this view, we have viewed the range of pipeline developments coming forward in Horsham (including the comprehensive Town Centre redevelopment at Piries Place), and have included areas of the adjoining authorities of Mole Valley, Reigate & Banstead, Tandridge, Mid Sussex and Horsham District within our Survey Area in order to understand the inflows and outflows of trade between the different areas.
- 2.52 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2035, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 16, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue the projected efficiencies in turnover of existing convenience retail floorspace.
- 2.53 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of **Appendix D and E** and can be summarised as:
- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace Figures sourced from GlobalData 2017 or, where data is not available, Nexus' professional judgement based on site visits.

- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers (2017) and Mintel Retail Rankings (2017) or Nexus' professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, given the extent of the Study Area, we do not assume any additional inflow of trade from visitors to Crawley from beyond the Study Area in line with the assumptions of the previous 2013 Study.

2.54 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre) from sources such as GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the Household Survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

2.55 We calculate a surplus of expenditure under both population Scenarios, as identified in Figures 2.15 and 2.16, rising from £37.1m at 2020 to £80.1m in 2035 for Scenario 1 (standard model of housing growth) and from £36.8m at 2020 to £76.5m by 2035 for Scenario 2 (capped housing growth).

2.56 We then go on to consider committed and extant permissions for new convenience retail floorspace across Crawley that could come forward over the next few years.

**Figure 2.15 | Gross Convenience Goods Surplus Expenditure in Crawley (Scenario 1)**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2020	291.4	328.6	0.0	37.1
2025	294.3	344.3	0.0	49.9
2030	294.3	359.3	0.0	65.0
2035	294.3	374.4	0.0	80.1

Source: Appendix D, Table 6a

**Figure 2.16 | Gross Convenience Goods Surplus Expenditure in Crawley (Scenario 2)**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2020	291.4	328.2	0.0	36.8
2025	294.3	343.7	0.0	49.4
2030	294.3	357.3	0.0	63.0
2035	294.3	370.9	0.0	76.5

Source: Appendix E, Table 6a

2.57 This includes any developments that are currently under construction, or have opened since September 2019, and so would not have been operating at the time of the Household Survey. We do not take into account proposed allocations for retail floorspace that do not benefit from extant and implementable permission over the plan period. In total, these committed developments equate to a net convenience floorspace of 671 sq m and an estimated turnover of just £5.4m (**Appendix D and E**, Table 6c). These commitments are then deducted from the surplus expenditure set out at Figures 2.15 and 2.16 to determine the quantitative capacity for new convenience floorspace.

**Figure 2.17 | Net Convenience Goods Surplus Expenditure in Crawley (Scenario 1)**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2020	37.1	5.4	31.8	2,500	4,300
2025	49.9	5.4	44.5	3,500	5,900
2030	65.0	5.4	59.6	4,600	7,900
2035	80.1	5.4	74.6	5,800	10,000

Source: Appendix D, Table 6d

**Figure 2.18 | Net Convenience Goods Surplus Expenditure in Crawley (Scenario 2)**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2020	36.8	5.4	31.4	2,500	4,200
2025	49.4	5.4	44.0	3,400	5,900
2030	63.0	5.4	57.6	4,500	7,700
2035	76.5	5.4	71.1	5,500	9,500

Source: Appendix E, Table 6d

<sup>1</sup> Average sales density assumed to be £12,560 per sq m (rounded) based on the average sales density of the leading four supermarkets

<sup>2</sup> Average sales density assumed to be £7,337 per sq m, based on the average sales density of Aldi, Lidl and other discount retail operators

- 2.58 Taking account of committed turnover, we identify a residual expenditure of between £37.1m and £36.8m at 2020, rising to between £80.1m and £76.5m by 2035. A modest proportion of this residual expenditure is made up from the over-trade at existing out of centre stores in the earlier years of the assessment, though over time, population and expenditure growth become more of a factor.
- 2.59 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (discount foodstores operators), we calculate a convenience goods floorspace capacity of between 2,500 sq m and 4,300 sq m in 2020 under Scenario 1 and 2,500 sq m and 4,200 sq m in 2020 under Scenario 2.
- 2.60 This quantitative capacity is calculated to grow to between 3,400 sq m and 5,900 sq m at 2025 (Scenario 1) and 3,500 sq m and 5,900 sq m at 2025 (Scenario 2). Over the plan period, this capacity rises to between 5,800 sq m and 10,000 sq m by 2035 (Scenario 1) and 5,500 sq m and 9,500 sq m by 2035 (Scenario 2). In purely quantitative terms, this capacity is considered to be sufficient to support the provision of new convenience retail floorspace over the plan period.

## Comparison Goods Findings

### Market Shares

- 2.61 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out at Tables 7-26 of **Appendix D and E**.
- 2.62 To begin with, we look at the overall comparison goods spend by residents across the Study Area. The results show that destinations in Crawley Town Centre account for 13.1% (£405.4m - £405.2m, Table 2.19) of the spending of all Study Area residents at 2019 (£3,085.4m - £3,084.8m per annum). A further 13.6% is spent in destinations in Crawley Borough but outside of the Town Centre, whilst the remaining 73.3% of spending carried out by residents across the Study Area is carried at destinations beyond Crawley, which is to be expected.
- 2.63 Whilst the summary above focuses on residents of the Study Area, we also examine where residents of Crawley are spending their money. The results show that Crawley Town Centre attracts the greatest proportion of comparison spending from Crawley residents (40.5%). Notably, the Town Centre



attracts marginally fewer of Crawley’s residents than the combined out of town facilities across the rest of the Borough (47.5%). Of this County Oak Retail Park is shown to draw a sizable 25.8% of comparison goods spend, as well as a relatively significant 8.0% of resident spending from beyond the Borough.

**Figure 2.19 | Comparison Goods - Market Share by Store**

Destination	Market Share		Turnover (from Study Area)	
	Study Area	Crawley Residents	Scenario 1	Scenario 2
<b>Crawley Town Centre</b>	<b>13.1%</b>	<b>40.5%</b>	<b>£405.4m</b>	<b>£405.2m</b>
<i>Edge of Centre Stores</i>	<i>2.2%</i>	<i>10.8%</i>	<i>£67.4m</i>	<i>£67.3m</i>
<b>Neighbourhood Centre Stores</b>	<b>0.1%</b>	<b>0.5%</b>	<b>£2.1m</b>	<b>£2.1m</b>
County Oak Retail Park, Metcalf Way, Crawley	8.0%	25.8%	£247.8m	£247.6m
Acorn Retail Park, County Oak Way, Crawley	1.6%	2.6%	£48.8m	£48.8m
<i>Others in Crawley Borough</i>	<i>1.6%</i>	<i>7.8%</i>	<i>£48.8m</i>	<i>£48.7m</i>
<b>Crawley Borough Sub-Total</b>	<b>26.7%</b>	<b>88.0%</b>	<b>£823.2m</b>	<b>£822.7m</b>
Horsham Town Centre	10.6%	0.4%	£327.5m	£327.5m
Haywards Heath Town Centre	4.3%	0.4%	£132.3m	£132.3m
Reigate Town Centre	1.5%	0.4%	£45.3m	£45.3m
Horley Town Centre	1.0%	0.3%	£30.7m	£29.7m
East Grinstead Town Centre	2.9%	0.1%	£90.6m	£90.6m
Redhill Town Centre	4.0%	0.0%	£123.8m	£123.8m
Burgess Hill Town Centre	3.1%	0.0%	£97.0m	£97.0m
Dorking Town Centre	2.2%	0.0%	£66.9m	£66.9m
<i>Others in the Study Area</i>	<i>14.2%</i>	<i>0.1%</i>	<i>£437.6m</i>	<i>£438.5m</i>
<b>Study Area Sub-Total</b>	<b>70.5%</b>	<b>89.7%</b>	<b>£2,174.9m</b>	<b>£2,174.9m</b>
Purley Way Retail Area, Croydon	6.1%	4.3%	£187.1m	£187.1m
Bluewater Shopping Centre, Dartford	2.8%	1.5%	£85.1m	£85.1m
<i>Others outside the Study Area</i>	<i>20.7%</i>	<i>4.4%</i>	<i>£638.3m</i>	<i>£638.3m</i>
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>£3,085.4m</b>	<b>£3,084.8m</b>

Source: Appendix D & E, Tables 3 and 4 (may not add due to rounding)

- 2.64 Notably, surrounding towns within the Study Area only attract a very limited proportion of spending from residents of Crawley (equating to just 1.7%, combined), whilst larger regional destinations such as the Purley Way Retail Area and Bluewater attracted the next largest shares at 4.3% and 1.5%, respectively. This suggests that no single destination rivals Crawley for local resident’s comparison goods spending, with shoppers spreading trips to various destinations for various reasons, none of which add up to provide a significant concern in terms of ‘leakage’.
- 2.65 We also consider differences between the draw of different categories of goods. Non-bulky goods such as clothing and footwear, and recreation goods show a high level of retention to the Town Centre, which is indicative of its strength as a retail destination, with equally strong retention levels to out of centre stores within the Borough, representing the strong out of centre retail park offer.

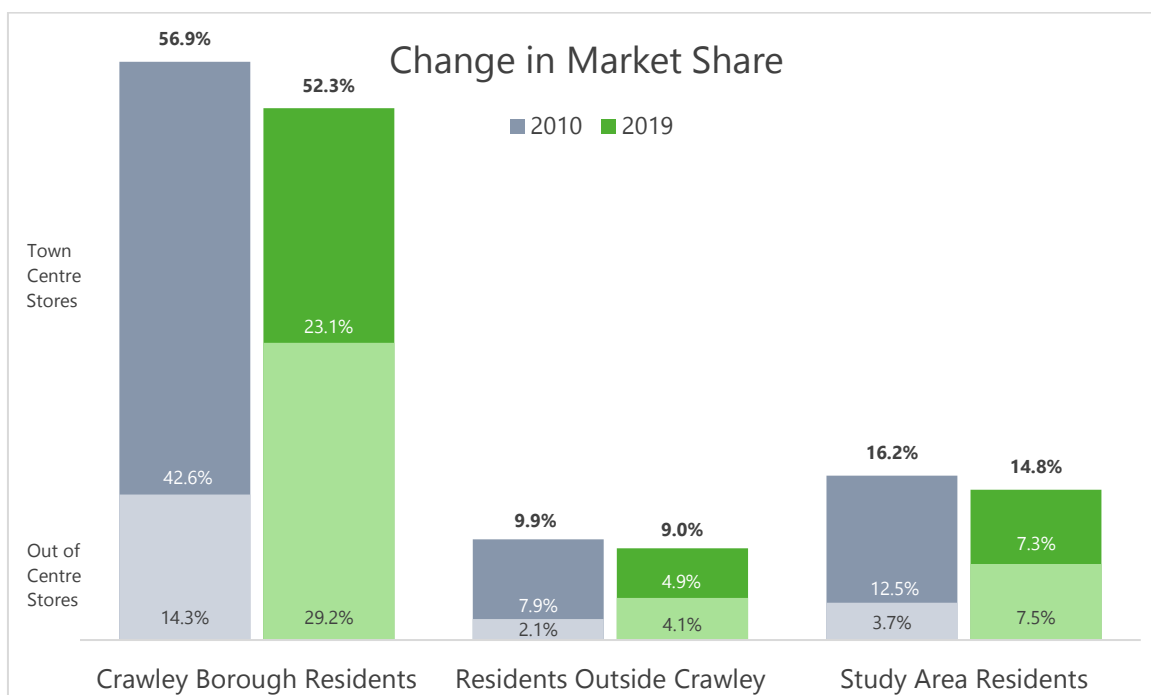
2.66 As would be expected, consumers are generally prepared to travel further for some items, typically bulky items that are generally sold from stores clustered within retail parks such as electrical and furniture goods, and so it is unsurprising that those categories have the lowest draw to the Town Centre. On the other hand, consumers have less need to visit multiple destinations outside of Crawley or to choose between stores for such items and so retention to these out of centre stores within the Borough is relatively high.

**Figure 2.20 | Comparison Goods – Crawley Resident’s Market Share by Category**

Destination	Crawley Town Centre	Rest of Crawley Borough	Total Crawley Borough	Beyond Crawley Borough
Clothing & Footwear	58.5%	30.5%	<b>89.1%</b>	10.9%
Books, CDs, DVDs etc.	63.8%	20.9%	<b>84.8%</b>	15.2%
Small Household Goods	37.8%	42.2%	<b>80.1%</b>	19.9%
Recreation Goods	52.9%	47.0%	<b>99.9%</b>	0.1%
Chemist Goods	43.2%	49.8%	<b>93.0%</b>	7.0%
<i>Non-bulky Goods Average</i>	<i>50.6%</i>	<i>37.7%</i>	<i>88.3%</i>	<i>11.7%</i>
Electrical Goods	15.2%	82.0%	<b>97.2%</b>	2.8%
DIY Goods	13.9%	83.3%	<b>97.1%</b>	2.9%
Furniture Goods	19.6%	48.6%	<b>68.2%</b>	31.8%
<b>Bulky Goods Average</b>	<b>16.5%</b>	<b>70.8%</b>	<b>87.3%</b>	<b>12.7%</b>
<b>Comparison Goods Average</b>	<b>40.5%</b>	<b>47.5%</b>	<b>88.0%</b>	<b>12.0%</b>

Source: Appendix D & E, Tables 9-25

**Figure 2.21 | Convenience Goods - Change in Market Shares (2010-2019)**



Source: Appendix D & E, Table 25 / Retail Capacity and Impact Study Update (2013), Appendix B, Scenario 1, Table 7

2.67 Once again, having modelled the data from the market share assessment behind the 2013 Study

(based on a 2010 Household Telephone Survey), we go on to assess the changes in shopping patterns of residents across the Study Area.

- 2.68 Notably, the proportion of retained spend directed to the Town Centre has fallen significantly over the same period, as comparison goods spending to out of centre facilities in Crawley has doubled from 14.3% in 2010 to 29.2% in 2019. Whilst it is positive to note that residents continue to spend within the Borough, the growth of facilities such as County Oak and Acorn Retail Parks, as well as edge of centre stores at Crawley Avenue and London Road Retail Parks has come at the expense of Town Centre facilities.
- 2.69 Nonetheless, retention of spending from residents of Crawley and across the wider Study Area has risen marginally since 2010 demonstrating the continued draw of facilities in Crawley to the local and regional population.

### Comparison Retail Capacity

- 2.70 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).
- 2.71 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2020, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2035.
- 2.72 For the purposes of our assessment, we have assumed that Crawley Town Centre's attraction to Study Area residents will remain constant at 26.7% of all spending proportionate to population growth (Table 26a). Based on the scale and location of planned developments within Crawley, as well as those outside of it, we consider this a robust basis for analysis. Figure 2.22 sets out the resultant gross

comparison goods capacity forecast over time.

**Figure 2.22 | Gross Comparison Goods Surplus Expenditure in Crawley (Scenario 1)**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2020	843.5	823.2	20.3	0.0
2025	968.4	951.9	22.2	5.8
2030	1,085.0	1,199.5	24.5	139.0
2035	1,215.6	1,454.3	26.9	265.6

Source: Appendix D, Table 26a

**Figure 2.23 | Gross Comparison Goods Surplus Expenditure in Crawley (Scenario 2)**

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2020	843.0	822.7	20.3	0.0
2025	967.8	950.8	22.2	5.3
2030	1,084.3	1,193.9	24.5	134.1
2035	1,214.9	1,442.3	26.9	254.3

Source: Appendix E, Table 26a

- 2.73 We then consider committed and extant planning permissions for new comparison retail floorspace across Crawley that are likely to come forward over the next few years. This includes any developments that are currently under construction, or have opened or been granted planning permission since September 2019, and so would not have been operating at the time of the Household Survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace in the draft Local Plan Review that do not benefit from extant and implementable permission over the plan period.
- 2.74 In total, these committed developments equate to a net comparison goods floorspace of approximately 1,666 sq m net and an estimated turnover of £10.8m (see Table 26c at **Appendix D and E**). The most relevant commitment is the County Oak Retail Park redevelopment, reconfiguring a number of units to facilitate a new occupier, which is to provide an uplift of approximately 700 sq m of retail floorspace equating to £3.5m of estimated turnover. These commitments are then deducted from the surplus expenditure set out in Figures 2.22 and 2.23. Once accounted for, we are

able to calculate the net comparison goods capacity.

**Figure 2.24 | Net Comparison Goods Surplus Expenditure in Crawley (Scenario 1)**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2020	0.0	10.8	-10.8	-1,400	-1,800
2025	5.8	11.7	-6.0	-600	-900
2030	139.0	13.0	126.0	12,200	16,700
2035	265.6	14.0	251.7	21,800	29,700

Source: Appendix D, Table 26d

**Figure 2.25 | Net Comparison Goods Surplus Expenditure in Crawley (Scenario 2)**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2020	0.0	10.8	-10.8	-1,400	-1,800
2025	5.3	11.7	-6.5	-700	-1,000
2030	134.1	13.0	121.1	11,700	16,000
2035	254.3	14.0	240.4	20,800	28,400

Source: Appendix E, Table 26d

<sup>1</sup> Average sales density assumed to be £7,500 per sq m, which Nexus Planning considers to be towards the higher end of what would be achieved in Crawley

<sup>2</sup> Average sales density assumed to be £5,500 per sq m, which Nexus Planning considers to be towards the lower end of what would be achieved in Crawley

- 2.75 Taking account of committed turnover (see Table 26c at **Appendix D and E**), we identify a negative residual expenditure to 2025 across both population Scenarios. Negative capacities are shown into the near future as, despite the forecast growth in population (and associated increases in available spending), the projected turnover of the committed comparison developments exceed the amount of expenditure growth.
- 2.76 By 2030 though, there are positive residual sums as population and expenditure growth begins to outstrip the commitments currently in the system. Looking at the long-range forecasts, by 2030 there is assessed to be between £126.0m and £121.1m of additional comparison goods expenditure, rising to £251.4m and £140.4m by 2035.
- 2.77 Using average sales densities to calculate a minimum floorspace scenario (£7,500/sq m at 2020) and a maximum floorspace scenario (£5,500/sq m at 2020), we go on to calculate capacity for additional comparison goods.

- 2.78 This residual expenditure would provide capacity for between 12,200 sq m and 16,700 sq m net additional comparison goods floorspace in 2030 under Scenario 1, and between 11,700 sq m and 16,000 sq m net under Scenario 2.
- 2.79 This capacity is calculated to rise further by 2035, to between 21,800 sq m and 29,700 sq m (Scenario 1) and between 20,800 sq m and 28,400 sq m (Scenario 2).
- 2.80 The above findings present the quantitative capacity for new retail floorspace in Crawley over the plan period to 2035. However, as we note earlier in this Study, any assessed need for new floorspace should be considered on the basis of both quantitative and qualitative capacity and we go on to consider the health of Crawley as the basis for any qualitative need in Section 4.
- 2.81 Additionally, given current economic uncertainties and, more relevantly, pressures on the retail sector, we would stress the need to treat long-term forecasts with caution. As highlighted within the PPG<sup>3</sup>: *“Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to **focus on a limited period (such as the next five years)** but will also need to take the lifetime of the plan into account and be regularly reviewed.”* (our emphasis)

## Leisure Goods Findings

- 2.82 The results of the NEMS Household Telephone and Door-to-Door Surveys offer an indication of locations/facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Borough.
- 2.83 The modelling of future commercial leisure need cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.
- 2.84 Nevertheless, we appraise the existing provision of leisure facilities across the Borough, and compare this against recognised sector ‘standards’ or ‘benchmarks’. The completion of this ‘benchmarking exercise’ allows us to establish deficits and where gaps in the provision of existing facilities may be.

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<sup>3</sup> (Town Centres and Retail) Planning Practice Guidance, Paragraph: 004, Reference ID: 2b-004-20190722

## Existing Market Shares

- 2.85 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 35-44) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full within **Appendix C** and we extrapolate the key results here.
- 2.86 It is important to acknowledge that residents outside the Borough may visit facilities within the Borough for leisure, recreation and cultural activities, as well as vice-versa. In response to this, the Study Area includes Zones 2-12 in order that we can understand inflows and outflows. However, as the purpose of this Section is to review the leisure patterns of residents within the Borough, a detailed review of Zones 2-12 is not included.
- 2.87 It is also important to re-iterate the differences between Zones 1a and 1b, both of which we focus on in this leisure capacity exercise. The results for observed leisure patterns in the two zones are markedly different, which is likely to be testament to the fact that Zone 1a is centrally located in the Town Centre. It also comprises only approximately 1% of the overall population of Crawley Borough, and does not fully represent the demographic of the Borough as a whole.
- 2.88 The observed leisure patterns of residents in Zone 1b, therefore, understandably form the basis for much of our quantitative leisure analysis, as we explain further below. Notwithstanding, we examine the market share for both Zones at the start of this analysis. The analysis for Zone 1a then feeds directly in to Section 6 of the Study, where we consider the implications of the Town Centre's growing residential population in terms of neighbourhood services, including leisure facilities.
- 2.89 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 35 of the Household Survey NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished).
- 2.90 As evident in Figure 2.26, the most popular leisure activity across the Borough is to go to a restaurant, which 75.0% of Study Area respondents indicated they do on at least an occasional basis. The second most popular activity is going to a cinema (62.0%). Visiting bingo halls (4.0%) is the least popular activity followed by ten-pin bowling (20.3%).

2.91 As already highlighted, there are some very notable differences between Zone 1a (town centre residents) and the rest of the Borough (Zone 1b), including the following:

- Leisure patterns for residents in Zone 1b (the rest of the Borough) are quite closely aligned with the leisure patterns for Zones 1-12 (the Study Area). One notable difference though, is that Zone 1b residents (44.7%), are significantly less likely to visit pubs/bars/nightclubs than residents of the Study Area as a whole (58.6%). The same is also true of visiting theatres/concert halls/museums etc. (31.9% versus 50.7%). In contrast, residents of the wider Crawley Borough are significantly more likely to go ten-pin bowling (30.3% versus 20.3%).
- Residents in Zone 1a (Crawley Town Centre) are though less likely to take part in almost all leisure activities. Some stand-out figures are that only 20.9% of Zone 1a residents are likely to visit restaurants (as opposed to 71.7% of residents in the rest of the Borough), whilst only 29.4% of residents are likely to visit the cinema (versus 63.1%). The only leisure activity that Zone 1a residents are more likely to carry out than residents elsewhere in the Borough is bingo (8.0% versus 4.7%). Overall, 35.5% of residents surveyed in Zone 1a suggested that they did not participate in any leisure activities (contrasted to 13.1% in the rest of the Borough).

**Figure 2.26 | Participation in Leisure Activities (%)**

Activity	Study Area Average	Zone 1a (Crawley Town Centre)	Zone 1b (Rest of Crawley Borough)
<b>Indoor Health &amp; Fitness</b>	31.4%	21.3%	34.1%
<b>Cinema</b>	62.0%	29.4%	63.1%
<b>Restaurant</b>	75.0%	20.9%	71.7%
<b>Pubs/bars/ nightclubs</b>	58.6%	43.4%	44.7%
<b>Ten-pin bowling</b>	20.3%	14.4%	30.3%
<b>Bingo</b>	4.0%	8.0%	4.7%
<b>Cultural Facilities</b>	50.7%	6.6%	31.9%
<b>None mentioned</b>	9.1%	35.5%	13.1%

Source: Appendix C, Question 35 of NEMS Household Survey



2.92 NEMS also asked a series of questions to understand where residents of each zone usually undertake their chosen leisure activity. We examine the most popular destinations for residents of Zones 1a and 1b in Figures 2.27 and 2.28.

**Figure 2.27 | Most Popular Leisure Destinations for residents in Zone 1a (%)**

Activity	First Choice	Second Choice	Third Choice
<b>Indoor Health &amp; Fitness</b>	Anytime Fitness, Crawley (100.0%)	-	-
<b>Cinema</b>	Cineworld, Crawley (66.8%)	Central London (18.6%)	Everyman, Reigate (5.1%)
<b>Restaurant</b>	Brighton (62.0%)	Crawley Town Centre (25.3%)	Central London (12.7%)
<b>Pubs/bars/ nightclubs</b>	Crawley Town Centre (55.4%)	Brighton (38.5%)	Central London (6.1%)
<b>Ten-pin bowling</b>	Hollywood Bowl, Crawley (87.9%)	Freedom Bowl, Hailsham (12.1%)	-
<b>Bingo</b>	Buzz Bingo, Crawley (57.8%)	Others, outside Study Area (42.2%)	-
<b>Cultural Facilities</b>	Brighton (42.7%)	Central London (40.3%)	Barn Theatre, Crawley (17.0%)

Source: Appendix C, Questions 36-42 of NEMS Household Survey

2.93 Figures 2.27 and 2.28 generally highlight that Crawley successfully provides for its resident population in almost all instances. The only response in either Zones 1a or 1b where the most popular destination was not a destination in Crawley itself, was the 'most popular cultural destinations' for residents in Zone 1a, where Brighton was most popular; however, given the relatively limited sample size, these results should not be considered determinate for Town Centre residents going forward.

2.94 With Zone 1b representing around 99% of the Borough's population, it is healthy to note that the top answer in each case was a Crawley destination.

**Figure 2.28 | Most Popular Leisure Destinations for residents in Zone 1b (%)**

Activity	First Choice	Second Choice	Third Choice
<b>Indoor Health &amp; Fitness</b>	The Gym, Crawley (25.2%)	K2 Crawley, Crawley (19.7%)	Nuffield Health, Crawley (17.1%)
<b>Cinema</b>	Cineworld, Crawley (95.6%)	Scott Cinemas, East Grinstead (3.3%)	West Green Community Cinema, St. Peter's Church, Crawley (1.1%)
<b>Restaurant</b>	Crawley Town Centre (38.9%)	Crawley Leisure Park (31.5%)	Horsham (4.0%)
<b>Pubs/bars/ nightclubs</b>	Crawley Town Centre (56.6%)	Abroad (6.7%)	Horsham (5.2%)
<b>Ten-pin bowling</b>	Hollywood Bowl, Crawley (95.6%)	Hollywood Bowl, Brighton (4.4%)	-
<b>Bingo</b>	Buzz Bingo, Crawley (84.8%)	Others, outside Study Area (15.2%)	-
<b>Cultural Facilities</b>	The Hawth Theatre, Crawley (31.8%)	Central London (31.3%)	Crawley Town Centre (11.0%)

Source: Appendix C, Questions 36-42 of NEMS Household Survey

## Need for Additional Leisure Facilities

2.95 Question 43 of the Household Survey found that the majority of respondents across the Study Area (64.7%) did not identify any leisure facilities of which they wished to see more. This suggests that residents are largely happy with the provision of facilities. Such a response is typical of our surveys across the UK. However, it is notable that the equivalent figures for Zone 1a (30.5%) and 1b (39.3%) were much lower, suggesting that there are some more localised issues in Crawley itself.

2.96 In Figure 2.29 we isolate the responses for each Zone in order to identify what the main requests for new leisure facilities were from residents in each area, and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed. We have ordered the responses by those

most prevalent in Zone 1b.

**Figure 2.29 | Leisure Facilities residents wish to see more of (%)**

Activity	Study Area Average	Zone 1a (Crawley Town Centre)	Zone 1b (Rest of Crawley Borough)
<b>None or don't know</b>	64.7%	30.5%	39.3%
<b>Ice Rink</b>	6.8%	13.9%	20.9%
<b>Better Shopping Facilities</b>	5.2%	0.0%	15.0%
<b>Museum/Art Galleries</b>	3.3%	0.0%	15.0%
<b>Trampoline Park</b>	3.5%	4.4%	13.1%
<b>Escape Rooms</b>	4.7%	0.0%	11.9%
<b>Cycle Paths</b>	2.0%	0.0%	11.7%
<b>Restaurants</b>	4.2%	3.5%	11.5%
<b>Concert Hall/Live Music Venue</b>	2.7%	2.7%	9.8%
<b>Play spaces/Park Facilities</b>	2.7%	14.2%	9.5%

Source: Appendix C, Question 43 of NEMS Household Survey (multiple responses allowed to this question)

2.97 The results highlight some interesting anomalies. Whilst it is normal in such surveys to find that residents would like better shopping facilities and other broad classifications around open space and play facilities, it is less usual to find requests for more specific items such as ice rinks, museum/art galleries and trampoline parks towards the top of residents' wish lists. This is perhaps symptomatic of the fact that Crawley sits within an area where comparably sized towns have such facilities, and where residents therefore expect to see them provided for locally.

2.98 Notably, whilst residents of the wider Borough would like to see an increase in a fairly diverse range

of leisure activities, residents in Zone 1a most requested more bars/pubs and restaurants, perhaps indicative of both the demographic of Town Centre residents, but also the perceived lack of a walkable evening economy.

## Capacity for Additional Leisure Facilities

- 2.99 Having identified existing market shares and examined the demand for new facilities from the Borough's residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism and viability of actually providing for new facilities through the Local Plan Review process in particular.
- 2.100 The findings of the NEMS Household Survey allow us to assess market shares within the Borough for a variety of leisure sectors. As such, we have undertaken a 'benchmarking' exercise by referencing the estimated increases in the Study Area population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

### Health and Fitness Capacity

- 2.101 The Leisure Database Company<sup>4</sup> (May 2019) identify that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2019, there were in the region of 7,239 health and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low cost gyms, which account for over 35% of membership in the private sector.
- 2.102 In 2016, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club. Building on this, our household survey results showed that approximately 34.1% of Borough residents (taken to be represented by Zone 1b residents) participate in health and fitness activities (Q35). Of those, the survey results suggest that around 72.9% of residents currently carry out their health & fitness activities within the

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<sup>4</sup> State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

Borough itself (Q36). We term this the 'Retention rate', and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Borough over time.

- 2.103 As identified earlier in this Section, under Scenario 1 (standard methodology), the Borough has an identified estimated population of 123,934 at 2020, increasing to 148,856 by 2035. The equivalent figures for Scenario 2 (capped methodology) are 123,751 at 2020, increasing to 140,565 by 2035.
- 2.104 Based on the current participation rates, retention rates, and average club size membership identified above, we calculate in Figure 2.30 below that that under both Scenario 1 and Scenario 2, the area could support around 7 large health and fitness centres over the Plan period.

**Figure 2.30 | Health and Fitness Centre Capacity**

Year	Borough Population	Regular Participants @ 34.1%	Retention Rate @ 72.9%	Average Membership	No. of Clubs Supported by the Area
<b>Scenario 1</b>					
2020	123,934	42,261	30,808	5,250	5.9
2025	132,342	45,129	32,899	5,250	6.3
2030	140,438	47,889	34,911	5,250	6.6
2035	148,856	50,760	37,004	5,250	7.0
<b>Scenario 2</b>					
2020	123,751	42,199	30,763	5,250	5.9
2025	131,655	44,894	32,728	5,250	6.2
2030	136,150	46,427	33,845	5,250	6.4
2035	140,565	47,932	34,943	5,250	6.7

Note: Typical population to support a health and fitness club derived from the Leisure Database Company Research (2019)

- 2.105 Comparing capacity to supply, we consider that there is perhaps room for one or two more commercial health and fitness facilities in Crawley. Our survey results showed there to be 4 large privately owned health and fitness facilities within the Borough that attract a significant market share: The Gym (Queens Square), Anytime Fitness (Pegler Way), K2 Crawley (Pease Pottage Hill) and Nuffield Health (Crawley Leisure Park). These facilities are likely to be supported through a combination of smaller, and home-based health and personal training facilities. Whilst this informal offer is difficult to quantify (and does not necessary provide full-time facilities), it complements the Borough's more traditionally structured health and fitness offer.

- 2.106 Notwithstanding, the qualitative results of our survey (Q43) did not point to any significant degree of concern over a perceived lack of health and fitness facilities in Crawley, with only 5.5% of Zone 1a, and 4.4% of Zone 1b residents highlighting this as an issue.
- 2.107 We recommend therefore that the Council be welcoming of commercial competition in general, not least because of the health and well-being benefits, but that there is unlikely to be a requirement to allocate any specific site for this purpose.

### Cinema Capacity

- 2.108 The Borough has just one mainstream cinema, the Cineworld at Crawley Leisure Park, which has 15 screens.
- 2.109 The NEMS Household Survey outlines that the Cineworld cinema, as well as other smaller independent screens (West Green Community Cinema at St. Peter's Church, Crawley), retain almost all cinema trips made by residents of the Borough (96.7%, Q37).
- 2.110 In 2016, the Cinema Advertising Association identified that total cinema admissions were 168.3 million with the UK average being 2.6 trips per person.
- 2.111 The Cinema Advertising Association identified 788 cinema facilities with 4,194 screens in the UK and Lichfield's Cinescope database identified approximately 800,000 cinema seats in the UK. In 2016 (the most recently available public data) the UK yearly average was 40,000 cinema trips per screen.
- 2.112 As shown in Figure 2.31, in order to gauge the number of cinema screens that can be supported by the Borough over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.6 trips per person). We also account for the Borough's current cinema trip retention rate and assume that this will persist (96.7% of all cinema trips).
- 2.113 Our benchmarking exercise suggests that the existing provision of 15 no. screens, is more than adequate to serve the needs of the resident population to the end of the Plan period under either population scenario. It points towards the Cineworld actually attracting a significant proportion of its trade from outside the Crawley area. This is evidenced by the survey, which sees the Cineworld attract substantial market share from almost all of Zones 2-12 (e.g. 85.1% from Zone 2 and 57.4% from Zone 7).

2.114 It might be expected that there could be an element of dissatisfaction with the provision of just one cinema facility within the Borough, but this is not borne though in the survey findings, with only 8.1% of residents in Zone 1b, and 2.8% in Zone 1a, expressing any desire to see enhanced cinema facilities.

**Figure 2.31 | Cinema Screen Capacity**

Year	Borough Population	No. of Cinema Visits Per Person	Total Cinema Attendance	Retention Rate @ 96.7%	Trips per Screen	Cinema Screens Supported
<b>Scenario 1</b>						
2020	123,934	2.6	322,228	311,595	40,000	7.8
2025	132,342	2.6	344,089	332,734	40,000	8.3
2030	140,438	2.6	365,139	353,089	40,000	8.8
2035	148,856	2.6	387,026	374,253	40,000	9.4
<b>Scenario 2</b>						
2020	123,751	2.6	321,753	311,125	40,000	7.8
2025	131,655	2.6	342,303	331,007	40,000	8.3
2030	136,150	2.6	353,990	342,308	40,000	8.6
2035	140,565	2.6	365,469	353,408	40,000	8.8

2.115 Coupled with our quantitative findings, we would not recommend the Council actively seeking a further major cinema facility in the Borough,

### Ten-Pin Bowling Capacity

2.116 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes<sup>5</sup>, a decrease since 2011 where 5,773 bowling lanes were identified<sup>6</sup>. Taking into account the UK population at the time this data was produced (64.6 million<sup>7</sup>), this equates to one lane for every 11,500 persons.

2.117 There is just one ten-pin bowling facility in Crawley, the 26 lane Hollywood Bowl at Crawley Leisure Park.

2.118 The retention rate for Borough residents' trips to ten-pin bowling facilities has been taken into account (30.3% of all trips made by residents of Zone 1b) in order to calculate the number of

<sup>5</sup> 'Ten-pin Bowling – UK' Mintel, May 2014

<sup>6</sup> 'Ten-pin Bowling – UK', Mintel, November 2011

<sup>7</sup> As identified by the Office for National Statistics' Population Estimates for the UK 2014

additional lanes that can be supported in the Borough.

**Figure 2.32 | Ten-Pin Bowling Capacity**

Year	Borough Population	Regular Participants @ 30.3%	Typical Population Required to Support a Ten-Pin Bowling Lane	Potential Number of Lanes Supported in the Borough
<b>Scenario 1</b>				
<b>2020</b>	123,934	37,552	11,500	3.3
<b>2025</b>	132,342	40,100	11,500	3.5
<b>2030</b>	140,438	42,553	11,500	3.7
<b>2035</b>	148,856	45,103	11,500	3.9
<b>Scenario 2</b>				
<b>2020</b>	123,751	37,497	11,500	3.3
<b>2025</b>	131,655	39,891	11,500	3.5
<b>2030</b>	136,150	41,253	11,500	3.6
<b>2035</b>	140,565	42,591	11,500	3.7

2.119 Figure 2.32 indicates that, based on the assumed benchmark, the Borough’s population supports around 4 lanes during the Plan period to 2035. This is far exceeded by the current level of provision (26 lanes), and therefore even allowing for some level of inflow (again our survey showed that significant numbers of trips are made to the Hollywood Bowl by residents of Zones 2-12), the current level of provision is likely to be sufficient for the Plan period.

### Restaurants, Bars and Café Capacity

2.120 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the Borough, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision. This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, bars, café etc.) over the plan period.

2.121 This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.

2.122 Experian provides localised data on spending on restaurants and cafés per capita, which includes



spending on alcoholic drinks (away from home) and take-away meals. This spending is shown to be £1,200 per annum in Zone 1b (2017 prices).

2.123 Taking into account the population growth, and anticipated leisure spending growth rates from Experian (1.1% growth per annum, Figure 2, Experian Retail Planner 16), we calculate in Figure 2.33 a total spend across the Study Area from £153.7m (Scenario 1) and £153.5m (Scenario 2) at 2020, rising to £217.5m (Scenario 1) and £205.4m (Scenario 2) by 2035.

**Figure 2.33 | Restaurants, Bars and Café Spending**

Year	Borough Population	Spend Per Capita	Total Spend	Retention Rate @ 70.0%	Growth in Spending	Benchmark Growth	Residual Spending
<b>Scenario 1</b>							
<b>2020</b>	123,934	£1,240	£153.7m	£107.6m	-	-	-
<b>2025</b>	132,342	£1,310	£173.4m	£121.4m	£13.8m	£5.5m	£8.3m
<b>2030</b>	140,438	£1,383	£194.2m	£136.0m	£28.4m	£10.8m	£17.6m
<b>2035</b>	148,856	£1,461	£217.5m	£152.2m	£44.6m	£16.1m	£28.5m
<b>Scenario 2</b>							
<b>2020</b>	123,751	£1,240	£153.5m	£107.4m	-	-	-
<b>2025</b>	131,655	£1,310	£172.5m	£120.7m	£13.3m	£5.4m	£7.9m
<b>2030</b>	136,150	£1,383	£188.3m	£131.8m	£24.4m	£10.7m	£13.7m
<b>2035</b>	140,565	£1,461	£205.4m	£143.8m	£36.4m	£16.1m	£20.4m

2.124 This spending is then attributed to the restaurant, café and bar facilities across the Borough. Restaurants, cafés etc. in Crawley attracted 70.4% of the Borough’s total food spending, whilst the Borough’s pubs and bars attracted 68.7% of beverage spending. Accordingly, it is reasonable to assume that around 70% of all food and beverage spending by residents of the Borough is currently spent in the Borough itself.

2.125 Growing the turnover of facilities from current levels on the basis of 1% per annum<sup>8</sup> to account for growth through extensions and trading efficiencies over the plan period, we find the anticipated spending surplus (or deficit) under each population scenario.

<sup>8</sup> We are not aware of any published data for restaurant, bar and café sales efficiency growth and so have assumed a figure of 1%, which is closely aligned to convenience goods spending.

**Figure 2.34 | Restaurants, Bars and Café Capacity**

Year	Residual Spending	Sales Density	Floorspace (sq m)
<b>Scenario 1</b>			
2020	-	£5,000	-
2025	£8.3m	£5,250	1,580
2030	£17.6m	£5,500	3,200
2035	£28.5m	£5,750	4,960
<b>Scenario 2</b>			
2020	-	£5,000	-
2025	£7.9m	£5,250	1,500
2030	£13.7m	£5,500	2,490
2035	£20.4m	£5,750	3,550

2.126 Under Scenario 1, we find a total food and beverage spending surplus across Crawley Borough of £28.5m by 2035, and of £20.4m by 2035 under Scenario 2.

2.127 Adopting an average sales density of £5,000 per sq m at 2020 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant and café floorspace that could be supported by the identified surplus expenditure.

2.128 The above findings present the quantitative and qualitative capacity for new leisure development in Crawley. However, as we note earlier in this Study, leisure spending is not undertaken regularly and residents will often visit a variety of different facilities depending on a number of factors. Nevertheless, our benchmarking assessment establishes potential gaps in the provision of existing facilities.

2.129 Whilst capacity is shown to exist in terms of both health and fitness clubs and restaurants, bars and cafés, the presence of a number of facilities in and around Crawley is ample to satisfy demand. Nevertheless, in line with the general provision of the NPPF and reduced trip distances, the Council should always be open to the provision of additional facilities in sustainable locations subject to relevant material considerations.

## Stage 2

### Trends, Town Centre Assessment & Policy Recommendations

## 3.0 Current Retail and Leisure Trends

3.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an update of current retail and leisure trends below. In reading the below, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping has impacted on the sector, new retailers and new formats continue to come forward and evolve to meet shoppers' needs. The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination.

### The Impact of Brexit and the Current State of the UK Economy

3.2 Subsequent to the referendum result in June 2016, which secured a majority vote for the UK to leave the European Union, it is generally accepted that the immediate future is likely to be one of economic uncertainty with a consequential impact on consumer confidence and spending. In the immediate aftermath of Brexit, Verdict published its Economic & Retail Update<sup>9</sup> in September 2016. Verdict forecast the following economic trends.

- Retail growth across Britain in 2016 is likely to be relatively flat. However, a weaker pound effectively brings down the cost of goods for international travellers, who may spend more as a consequence.
- A weaker pound also leads to higher import and manufacturing costs, which retailers may pass onto consumers. Verdict anticipates that the clothing and footwear sector is likely to be the subject of the greatest inflationary price increases.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on the housing market and a resulting impact on those retailers who rely on householders investing in their property. As such, there may be less money spent on goods such as DIY, furniture, floor coverings, gardening goods and so on.
- In volume terms, little will change in respect of the food retail sector, but inflationary pressures

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<sup>9</sup> 'Economic & Retail Update: H2 2016', Verdict, September 2016

may mean that shoppers spend more on their groceries and less on other goods.

- 3.3 Three years on, Verdict's initial forecast in respect of how the market will react appears prescient.
- 3.4 As we go on to consider in greater detail below, page 2 of Experian's Retail Planner Briefing Note 16, ('ERPBN16') published December 2018, finds that the UK recovery will remain on a sluggish growth trajectory for the next couple of years amid ongoing uncertainty over the final outcome of the Brexit negotiation.
- 3.5 In terms of inflation, Office for National Statistics data<sup>10</sup> indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 1.7% at August 2019, its lowest level for 3 years. It is believed that with the Brexit deadline looming and a slowdown in the economy, businesses have been discouraged from raising prices.
- 3.6 In respect of the predicted downturn for the DIY sector, both B&Q and Homebase have reported difficult trading conditions in recent times. Kingfisher, owner of B&Q, saw its share price reduce significantly in March 2018 after reporting a 2.8% fall in full year like-for-like sales<sup>11</sup>. In November 2018, it was reported that Kingfisher is pulling B&Q out of Russia, Spain and Portugal further to sales falling by 3% in UK and Ireland<sup>12</sup>, however it has been reported that Kingfisher is struggling to offload the Iberian and Russian units<sup>13</sup>. Homebase is in greater difficulty after its previous owner, Wesfarmers, sold the chain to Hilco for £1 in May 2018. It was widely reported<sup>14</sup> that 1,500 jobs are at risk with at least 42 Homebase stores shutting in early 2019, further stores that were not announced as part of the initial round of closures have also ceased trading in recent months as the DIY retailer struggles to agree new rent terms with landlords<sup>15</sup>.
- 3.7 In terms of the grocery market, Kantar reported that grocery inflation stood at 1.6% for the 12-week period ending 2 December 2018. Prices (judged on a like-for-like basis, with reference to identical products) have increased over every quarterly reporting period since January 2017. However, this cannot be attributed just to the economic impacts of Brexit, but is also a consequence of weather

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<sup>10</sup> ONS 'Consumer price inflation tables' dataset, September 2019

<sup>11</sup> Article headlined 'DIY sector sums up need for economic improvement', Sky News online, 27 April 2018

<sup>12</sup> Article headlined 'B&Q owner to pull out of Russia, Spain and Portugal after sales fall', The Guardian, 21 November 2018

<sup>13</sup> Article headlined, 'Kingfisher struggles to offload Iberian and Russian units', Financial Times online 15 September 2019

<sup>14</sup> Including the article headlined 'Homebase to close 42 stores, putting 1,500 jobs at risk', The Guardian, 14 August 2018

<sup>15</sup> Article headlined 'further Homebase closures ahead' DIY week online

conditions and factors such as the 'sugar tax' on soft drinks (which came into force in April 2018). The increase in prices is not necessarily good news for the industry as it is reflective of costs increasing, and shoppers have often 'traded down' to buy cheaper substitutes or undertaken more shopping at discount stores in order to avoid price increases.

## Available Expenditure and the Impact of the Internet

- 3.8 ERPBN16 identifies the current buoyancy of the retail sector in the UK in the above context and provides forecasts in respect of future growth. Page 3 of ERPBN16 provides the following summary of the state of the UK economy:

*'The UK economy has thus far been relatively resilient against the turbulent backdrop of tense Brexit negotiations, the domestic political fallout and the ongoing cloud of uncertainty over the future with the EU. That said, the economy has entered a slower growth trajectory over the past year, with GDP growth set to average close to 1.5% in 2018, the weakest performance in 7 years. This reflects the lacklustre pace of business investment as companies continue to hold back on capital spending due to uncertainty over Brexit negotiations. After a very weak start to the year, consumer spending has recovered some momentum as the squeeze on incomes has unwound, but growth remains below the performance of earlier years. Latest indications suggest spending growth may be faltering again in the run up to Christmas. Looking ahead, our baseline projections assume that the initial phase of the Brexit negotiations will conclude by the end-March 2019 deadline and the focus will shift to defining the new trading relationship over the transition period. However, with so much still to be decided, uncertainty will persist over the final agreement for some time and investment decisions are set to remain cautious. Alongside this, the recovery in consumer spending will remain muted, reflecting sluggish incomes growth. Given this, we project GDP growth to remain close to 1.5% in 2019 and 2020, well below the performance of 2013-2017.'*

- 3.9 Whilst the political environment has evolved since the publication of the Experian briefing, the economic uncertainty remains whilst Brexit and future trading negotiations continue. Given the above, Experian forecasts limited increases in per capita convenience and comparison goods expenditure over the short term. The below Figure 3.1 provides an extract from Figure 1a and Figure 1b of ERPBN16. The figures identify that the convenience goods sector has been the subject of a reduction in per capita consumer expenditure in recent years (in real terms, after allowing for inflation). This can be attributed to the continued rise of the discount operator subsequent to the recession of 2008 and 2009, and the reaction of the 'big four' supermarket operators<sup>16</sup> to increased

<sup>16</sup> Asda, Morrisons, Sainsbury's and Tesco

competition. As such, Experian forecasts that there will very limited growth going forward.

- 3.10 As Figure 3.1 indicates, forecast increases in comparison goods spending are more optimistic, but it is evident that per capita comparison goods expenditure increases will be nowhere near the level evident around the turn of the millennium. Per capita expenditure growth is forecast to increase from 2.6% at 2019, 2.8% at 2020 and then to 3.3% between 2021 and 2025. By way of comparison, Table 1a of ERPBN suggests that per capita expenditure growth was, on average, 8.2% per annum between 1997 and 2007.

**Figure 3.1 | Experian’s Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth**

Volume Growth Per Head (%)	2014	2015	2016	2017	2018	2019	2020	2021-2025	2026-2037
Convenience goods	-0.1	0.5	1.3	1.3	1	0.5	0.1	0.1	0.1
Comparison goods	4.3	4.9	4.7	5.5	2.8	2.6	2.8	3.3	3.2

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 16, December 2018

- 3.11 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation is exacerbated through the increasing amount of expenditure which is committed through special forms of trading<sup>17</sup> and, in particular, online.

**Figure 3.2 | Experian’s Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors**

Volume Growth Per Head (%)	2013	2014	2015	2016	2017	2018	2023	2028	2033
Convenience goods	6.8	7.7	8.2	9.4	11.2	12.4	15.8	17.8	18.9
Comparison goods	15.5	16.0	16.4	18.1	20.7	22.6	26.8	28.3	28.8

Source: Experian Retail Planner Briefing Note 16, December 2018, Appendix 3, Figure 5

- 3.12 In this regard, Appendix 3 of ERPBN indicates that a strong increase in online shopping over the past decade has lifted the share of special forms of trading to a level where it now accounts for close to 20% of total retail sales (with the internet alone accounting from 17.0% of total retail sales). Experian forecasts that non-store retailing will continue to grow rapidly, increasing at a faster pace than total retail sales well into the long term. Experian believes that special forms of trading will account for almost 23.0% of retail sales by 2022, increasing to 27% by the mid-2030s. Figure 3.2 sets out Experian’s identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will

<sup>17</sup> Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

account for just over a quarter of comparison goods expenditure and around a sixth of convenience goods expenditure at 2033.

- 3.13 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about opportunities for retailers trading from the high street. In particular, many stores sell online but source purchases from regular stores rather than warehouses<sup>18</sup>, with purchases therefore helping to sustain tangible retail floorspace. Consequently, Experian also provides an 'adjusted' estimate of special forms of trading that relates to expenditure which is not available to actual stores, as we referenced when considering the level of expenditure generated within the Study Area at Section 2 of this report.
- 3.14 One way in which online expenditure can help sustain bricks and mortar retailers is through the use of the internet to 'click and collect', with purchases being picked up at a dedicated counter within a store. Such sales now account for over half of John Lewis internet orders<sup>19</sup>. In addition, it is evident that some retailers (particularly those offering big ticket items) are benefitting from having a bricks and mortar presence which can be used a 'showroom' in order to view and try goods, with some purchases then being made later online. Retailers are also more frequently providing in-store Wi-Fi and 'technology points', which can allow shoppers to browse a wider product range than is carried in-store. Accordingly, whilst new technology provides significant challenges to 'bricks and mortar' operators, it also provides opportunities for more progressive operators that are able to invest in new technology.

## Convenience Goods

- 3.15 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel<sup>20</sup> finds that the decline of the food superstore is well established and that this can be attributed to two issues.
- 3.16 Firstly, people are undertaking food shopping in different ways. More people are living in town and

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<sup>18</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

<sup>19</sup> 'Click and Collect', Mintel, September 2014

<sup>20</sup> 'UK Retail Rankings', Mintel, April 2016



city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on a 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop' as often.

3.17 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges, fresh foods and premium products becoming increasingly prevalent. When analysing the performance of Aldi, Retail Economics<sup>21</sup> notes that it has '*attacked the heartland of UK grocery*' by undercutting the 'big four' with highly competitive prices and investing in more high quality premium produce. In a similar way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and store openings since 2013.

3.18 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. Discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs as is the case at Acorn Retail Park.

**Figure 3.3 | Market Share of Principal UK Grocers**

Retailer	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, October 2016

3.19 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years. As Figure 3.3 sets out, the market share of each of the 'big four' has been consistently eroded in recent years, with Tesco and Morrisons being the subject of the largest percentage point losses.

<sup>21</sup> 'UK Food and Grocery', Retail Economics, September 2015

Tesco's market share of the UK grocery market has reduced from 23.7% at 2011 to 21.6% at 2016, and Morrisons market share reduced from 9.5% to 7.7% over the same time frame. The greatest beneficiaries have been Aldi and Lidl, with the former's market share more than doubling from 1.9% at 2011 to 5.3% at 2016. Lidl's market share increased from 1.9% to 2.7% over the same period.

- 3.20 As a consequence of the above, the 'big four' grocers have closed some of their loss-making stores and larger stores have accommodated further concessions in order to take floorspace which is no longer required for the operators' main product range. By way of example, Sainsbury's is continuing with plans<sup>22</sup> to open around 250 Argos concessions within Sainsbury's foodstores, with a further 60 to 70 stores planned<sup>23</sup>. Other food superstores have welcomed additional concessions (including day-to-day services, such as dry cleaning and key cutting).
- 3.21 The reduction in fish, meat and deli counters is to form part of a new cost-cutting plan announced by Tesco who plan to remove the concessions at 90 stores<sup>24</sup>.
- 3.22 A proposed merger between Asda and Sainsbury's, announced in April 2018 was subsequently blocked by the Competition and Markets Authority ('CMA') on 25 April 2019 on the basis of concerns that the proposed merger could push up prices and cut choice for customers<sup>25</sup>.
- 3.23 Discount operators continue to be generally optimistic in respect of their future growth. Aldi announced ambitious expansion plans in 2017, with an aspiration to trade from around 1,300 stores by 2022<sup>26</sup>; a significant increase given it currently trades from 840 stores. Aldi has recently confirmed their intention to expand with a pledge to open a new supermarket each week<sup>27</sup>. Similarly, Lidl announced its intention in 2017 is to open at least one shop a week in forthcoming years<sup>28</sup>, most recently Lidl's intention to open 40 new stores in the south east with a 500m expansion plan reported<sup>29</sup>
- 3.24 Tesco has attempted to take on the discounter market with its own operation, branded as Jack's and

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<sup>22</sup> Article headlined 'Sainsbury's pushes ahead with Argos rollout in supermarkets', BBC News online, 13 April 2017

<sup>23</sup> Article headlines 'Sainsbury's to close 60 Argos stores to cut costs', BBC News online 25 September 2019

<sup>24</sup> Article headlined 'Can a shift in shopping help Tesco beat the discounters?' 29 January 2019

<sup>25</sup> Competition and Markets Authority, 'Press Release | CMA blocks merger between Sainsbury's and Asda', 25 April 2019

<sup>26</sup> Article headlined 'Aldi plans to open up to eight stores in some UK towns', The Guardian, 12 May 2017

<sup>27</sup> Article headlined 'Aldi plans to open a new supermarket each week', BBC News online 16 September 2019

<sup>28</sup> Article headlined 'Lidl to add 60 new shops a year in ambitious £1.5bn UK expansion plan, The Telegraph, 8 July 2017

<sup>29</sup> Article headlined 'Lidl's £500m London expansion to create 1500 jobs', Retail Gazette 12 June 2019

launched in September 2018<sup>30</sup>. The initial stores trading under the Jack's fascia occupy former and proposed Tesco stores, which was intended to allow the new operation to grow quickly. Report suggest that the initial plan is for around 15 - 20 Jack's stores to open across the UK, with 10 stores currently in operation. However, it has since been announced that the first Jack's store will be replaced with a Tesco store in response to limited demand for this new brand from customers<sup>31</sup>.

## Comparison Goods

- 3.25 The comparison goods sector is currently being squeezed by a number of factors, including reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes. This 'perfect storm' has resulted in changes in the structure of retailing on the UK high street and a generally lesser reliance on comparison goods retail.
- 3.26 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Joules and Hotel Chocolat), recent headlines have focused on failing retailers and store closures. Experts dubbed 2018 the 'worst year for the High Street since the recession' as around 93,000 retail jobs were lost and an estimated 4,000 stores closed their doors for the final time.
- 3.27 High profile retailers that have struggled include:
- BHS, which entered into administration in April 2016, resulting in the closure of 164 stores;
  - Marks & Spencer, which has had problems with its core clothing and homeware business, resulting in a May 2018 announcement that it is to close around 100 stores by 2022;
  - New Look, which entered into a company voluntary arrangement ('CVA') in March 2018, closing 85 stores, with the future of 13 more being negotiated with the landlords;
  - Maplin, which entered into administration in February 2018, resulting in the closure of 219 stores;
  - Toys 'R' Us, which entered into administration in February 2018, resulting in the closure of 100 stores;
  - Fashion chain Coast collapsed in October with all of its 24 stores were closed with immediate effect;

<sup>30</sup> Article headlined 'Tesco opens discount store Jack's to take on Lidl and Aldi', The Guardian, 19 September 2018

<sup>31</sup> Article headlined 'Tesco axes first Jack's store' 6 September 2019

- DIY chain Homebase has secured approval from creditors to close down more than 40 stores;
- Mothercare has now completed its UK store closure programme after closing 30 stores in the first quarter of 2019;
- Poundworld, which entered into administration in June 2018, resulting in the closure of 355 stores;
- House of Fraser, which confirmed in August 2018 that it is to close 31 of its 59 stores; and
- Debenhams fell into pre-pack administration (April 2019) and has previously warned of up to 50 store closures from 2020 onwards.

3.28 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose Marks & Spencer and House of Fraser from their high street in very quick succession), it is evident that a number of struggling retailers have failed to 'move with the times' and update both their offer and accommodation.

3.29 This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent). In this regard, there has been particular issue in respect of the 'polarisation' of shopping habits, whereby shoppers have increasingly been prepared to travel to access a greater choice of shops and services, effectively visiting centres for the day as a leisure activity. Consequently, larger retail venues (with a sub-regional or regional role) such as Crawley have tended to perform relatively well, but smaller centres (particularly those located in satellite towns around major centres) have struggled. The performance of smaller towns has been particularly affected by the last recession and by internet shopping, which has resulted in some retailers believing that they can cover the UK with a lesser number of stores.

3.30 Colliers has reported<sup>32</sup> that some new entrants to the market aspire to trade from around 50 stores in key locations across the UK and that this trend has an impact in terms of the take-up of available stock on the high street. It is also evident that certain retailers – including Marks & Spencer, Next and retailers within the Arcadia Group – are prepared to close town centre stores and instead trade out of centre.

3.31 Whilst such structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M

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<sup>32</sup> 'Midsummer Retail Report 2014', Colliers, July 2014

Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld, there is some evidence that this market may be approaching capacity.

- 3.32 More encouragingly, the availability of high street units appears to have helped stoke an entrepreneurial spirit, with a number of centres beginning to benefit from a greater focus on independent retailers, as well as modern markets, focused around food and drink operators.

## Food & Drink

- 3.33 One of the recent high street success stories has been the resurgence of the town centre leisure sector, which has sometimes been focused around new cinemas<sup>33</sup> close to the shopping core and, increasingly, modern markets.
- 3.34 Colliers<sup>34</sup> has reported that cinema openings are on the up and niche cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centre (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom.
- 3.35 The food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the ‘bubble has burst’ and a number of high profile operators have been in financial difficulty. These operators include Byron<sup>35</sup>, Prezzo<sup>36</sup> Carluccio’s<sup>37</sup> and Jamie’s Italian<sup>38</sup>, which have closed a number of restaurants in the past few months. Pizza Express is also under pressure and is preparing for talks with creditors over the level of debt. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result.

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<sup>33</sup> Which have been delivered in towns such as Bury, Oldham, Preston, Newport and Stockport

<sup>34</sup> ‘Midsummer Retail Report 2015’, Colliers, July 2015

<sup>35</sup> In January 2018, Byron announced that it was closing 20 of its 67 restaurants

<sup>36</sup> In March 2018, TPG Capital, announced the closure of 94 restaurants including the Prezzo, Mexico and Cleaver brands and 33 Chimichanga sites

<sup>37</sup> In May 2018, Carluccio’s announced that it was closing 34 of its 103 restaurants

<sup>38</sup> In February 2018, Jamie’s Italian announced that it was closing 12 of its 37 restaurants

- 3.36 More generally, the gym market continues to perform well, with the Leisure Database Company<sup>39</sup> identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership.
- 3.37 Budget gyms are currently particularly popular, with operators such as PureGym, the Gym Group and easyGym utilising a format that is based on low costs and high volume. Whilst PureGym has become the first operator to reach 200 clubs and to pass the one million members mark<sup>40</sup>, the Gym Group is currently growing at the greatest rate, opening 21 new gyms in 2017 and further 15 to 20 openings in 2018<sup>41</sup>.
- 3.38 There are also a number of emerging leisure concepts, which are generally supported by larger town centres, including modern 'in centre' bowling alleys (which have tend to have a strong food and drink offer and are pitched at providing an evening out, as much as the family market), indoor climbing centres<sup>42</sup> and crazy golf.

## Local Consideration for Crawley

- 3.39 The above trends have consequences for the future provision of retail, leisure and services in Crawley. Crawley Borough is undergoing significant planned growth, building upon its history as one of the eight designated new towns developed in the 1940s featuring 13 distinct neighbourhoods. Crawley has recently begun work on a new neighbourhood (Forge Wood), whilst an additional neighbourhood is under construction in Horsham District (Kilwood Vale), immediately adjoining Crawley's boundary.
- 3.40 The mix and composition of Crawley Town Centre is set to continue evolving, with over 2,000 new residential units in the pipeline, supported by the Crawley Growth Programme. This evolution of the Town Centre is a far cry from its original function purely as a *"retail, commercial and civic centre as part of the New Town,"* and has seen the centre developing into a neighbourhood in its own right.
- 3.41 Crawley Borough Council's current 'Local Plan, Crawley 2030' was adopted in December 2015 and

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<sup>39</sup> 'State of the UK Fitness Industry Report', Leisure Database Company, May 2018

<sup>40</sup> Article headlined 'State of industry report: UK fitness industry worth £5bn, Well to Do: Global Wellness News, 16 May 2018

<sup>41</sup> Article headlined 'Gym Group reports fastest growth in budget sector', Health Club Management, 16 January 2018

<sup>42</sup> The operator Rock Up is currently rolling out an expansion programme and is seeking additional sites in retail and leisure parks, and shopping centres

provides relevant town centre, primary shopping area, and primary and secondary frontage boundaries and designations in conjunction with Policies EC1, EC2, EC5 to EC8 and H2, which are further supported by the 2016 Town Centre Supplementary Planning Document (SPD). The Council is currently carrying out its five-year local plan Review for submission and adoption in 2020, which will replace the current Local Plan, in full.

- 3.42 The Crawley Growth Programme, and associated Town Centre Regeneration Programme 2018, seek to invest £60m of infrastructure and regeneration funding into the Town Centre, supporting the delivery of a minimum of 135,000 sq m of new Grade A commercial space to support 7,000 further jobs (in addition to the housing development referenced above). Projects include Queens Square and public realm improvements, schemes across the Eastern Gateway and Station Gateway in order to better integrate the sites and unlock external investments, Queensway public space and streetscape developments (including a bespoke market space), and the Council's own comprehensive Town Hall redevelopment.
- 3.43 London Gatwick International Airport is located to the north of the borough, providing various economic and employment related benefits for residents. This includes around 24,000 jobs on-airport, as well as numerous airport-related and indirect jobs in the borough, and support for various events such as the Summer Festival and Veteran Car Run. Manor Royal Business District, also in the north of the borough, provides around 30,000 jobs.
- 3.44 In addition to the ongoing residential, mixed-use, public realm and infrastructure developments across the Town Centre, the Town Centre Regeneration Programme 2018 incorporates a number of commercial and employment generating developments and schemes, including plans for a small business hub/innovation centre/incubation centre. Employ Crawley provides career support and assistance to Crawley residents, whilst also working with businesses and developers to unlock employment and skills opportunities.
- 3.45 The Crawley Town Centre Partnership (TCP) provides a framework for local businesses and service providers within the Town Centre to contribute and assist in delivering the Regeneration Programme alongside Crawley Borough Council.
- 3.46 Businesses in Crawley Town Centre have voted in favour of establishing a Business Improvement District (BID), unlocking more than £2million of investment over the next five years. Research with

businesses in the area identified a number of improvements focused around crime reduction, feelings of safety, promotions and marketing, accessibility and business networking. The BID will commence delivery on 1st April 2020.



## 4.0 Town Centre Assessment

- 4.1 This Section of the report details our qualitative and quantitative analysis of Crawley Town Centre, as well as providing an overview of the 16 Neighbourhood Parades within the Borough. This assessment includes a health check assessment to assess the vitality and viability of town centres, as well as a quantitative analysis of market shares.
- 4.2 The analysis focuses predominantly on Crawley Town Centre, but also considers each of the neighbourhood parades. The Town Centre functions as focal points of activity, by virtue of the range of services accessible to the local populations, comprising retail, employment, leisure, accommodation, community, and education facilities. Meanwhile, each of the neighbourhood parades fulfils a vital role in Crawley by serving the day-to-day needs of the immediate local community.
- 4.3 The extent of our assessments of the centres of Crawley Town Centre has been determined by Experian Goad Plans, in order to provide consistency and allow for comparison against the findings of previous studies.

### Methodology

- 4.4 This town centre assessment builds on our analysis of wider market trends as outlined in Section 3. We supplement this analysis with two sources of new empirical evidence; the results of a Household Telephone Survey and Door-to-Door Survey, and our town centre health checks.
- 4.5 By combining the results of the market research and our on-the-ground observations, we are able to build a picture of the current health of the Town Centre, based on analysis of its market share for different goods, as well as its performance against the range of health check indicators set out in the NPPF / PPG.
- 4.6 We describe our methodology for analysing the Household Telephone Survey and Door-to-Door Survey in Section 2, and the health check exercise below, before going on to examine Crawley Town Centre in detail, and providing snap-shots of each of the neighbourhood parades.

## Health Checks

- 4.7 Nexus carried out town centre health checks in August 2019 for Crawley Town Centre, which is the prime consideration in this study. Health checks are both a physical exercise in walking the town centres to understand their make-up and any physical strengths or weaknesses, as well as an exercise in consulting with local stakeholders.
- 4.8 The National Planning Policy Framework was adopted 27th March 2012, and the Government published the updated National Planning Policy Framework ('NPPF') in July 2018, which was then revised in February 2019. The NPPF sets out the Government's planning policies and how these are expected to be applied.
- 4.9 Chapter 7 of the NPPF sets out that local planning authorities should:
- Set out policies for the management and growth of town centres over a defined plan period;
  - Recognise town centres as the heart of their communities; and
  - Pursue policies to support their viability and vitality.
- 4.10 Paragraph 85 of the NPPF also recognises that town centres are the heart of communities, and that local planning authorities should pursue policies to support their viability and vitality, in addition to promoting competitive town centres that provide customer choice with a diverse retail offer that is reflective of the individuality of each town centre.
- 4.11 While the NPPF does not provide a precise list of criteria to be used to assess the health of a centre, the Government's 'Town Centres and Retail' National Planning Practice Guidance (PPG) of March 2014, updated in July 2019, offers a helpful set of indicators. The PPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time:
- **Diversity of Uses** | Data on the diversity of uses in Crawley Town Centre was collated during the health checks completed by Nexus in August 2019. The collected data includes the number, type and quantum of floorspace provided in these locations.
  - **Proportion of Vacant Street Level Property** | Vacant properties were also identified

during the 2019 health checks. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some 'churn' is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor.

- **Commercial Yields on Non-Domestic Property** | Whilst this can be an indicator of town centre performance over time, data on commercial yields for Crawley Town Centre is not publically available at this time, as it is now only produced by ONS for major cities. Commercial rents (as described below) provide a suitable alternative indication of the relative attractiveness of each centre and we include these within our assessment.
- **Customers' Views and Behaviour** | Information on customers' views is based on the results of the comprehensive NEMS Household Survey (completed in August - September 2019). These results provide an indication of how a centre is both used and viewed by local residents.
- **Retailer Representation and Intentions to Change Representation** | Information on the current strength of centres and retailer representation have been derived from Experian Goad Category Reports and other published sources.
- **Commercial Rents** | An examination of average prime rents within the Town Centre to facilitate an understanding of shopping rents and investment yields.
- **Pedestrian Flows** | General footfall and pedestrian flows were observed by Nexus during site visits to Crawley Town Centre in August 2019. The centres were visited on different days of the week and at different times of the day. Therefore, Nexus were able to obtain a comprehensive understanding of pedestrian flows through observation at these varying times.
- **Accessibility** | Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities. The accessibility of

a centre is determined by the ease and convenience of access by a variety of transport means including pedestrians, cyclists and disabled people.

- **Perceptions of Safety and Occurrence of Crime** | General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data.
- **State of Town Centre Environmental Quality** | Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus' site visits to the Town Centre
- **Balance between independent and multiple stores** | Consideration of the balance of retailer representation was informed by Nexus' site visits to the Town Centre, as well as Goad mapping.
- **Extent to which there is evidence of barriers to new businesses opening and existing businesses expanding** | Attention was given to the length of unit vacancies as per Goad Reports, as well as the size of units available to let, and insights provided through engagement with relevant stakeholders operating businesses within Crawley Town Centre.
- **Opening Hours / Availability / Extent to which there is an evening and night time economy offer** | General understanding of the night time economy was informed by Nexus' site visits to the Town Centre, stakeholder engagement, and a review of various local businesses' opening hours online.

4.12 Experian Goad plans, updated by Nexus Planning, are provided at **Appendix B**. Goad plans are defined by Experian, and whilst they are broadly in line with Town Centre boundaries shown on Proposals Maps, they are not always identical.

4.13 The following sections of the report provides a health check assessment of Crawley Town Centre in respect to the above indicators as selected by the Council and guided by the requirements of the NPPF, PPG and the Study brief.

4.14 As part of the health check assessments, Nexus undertook stakeholder engagement with local representatives to understand the local context, including issues and concerns affecting local residents and businesses. This involved stakeholder sessions in Crawley Town Centre, attended by the Crawley Town Centre Partnership, the Crawley Local Economy Action Group, and Councillors within

the Crawley Economic Regeneration Working Group. A presentation was given at each meeting, followed by a roundtable discussion during which attendees were invited to give their feedback.

- 4.15 The discussions covered the vitality and viability of Crawley, vacancies, mix of retail, parking, street environment, accessibility, crime and security, and town centre events.

## Crawley Town Centre

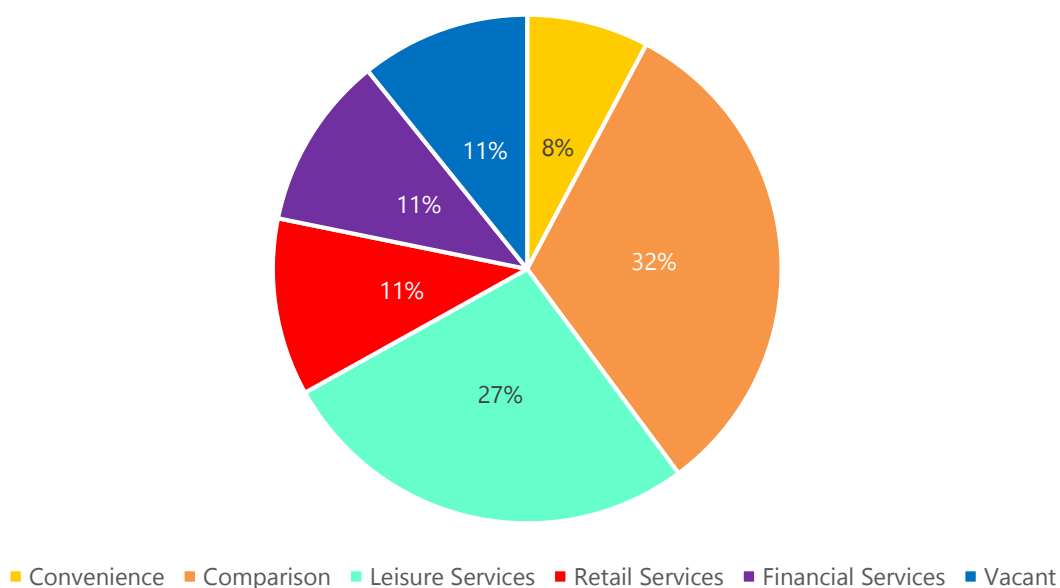
- 4.16 Crawley Town Centre is the main retail centre and leisure destination within Crawley Borough, and is also a key shopping destination for people living in the wider sub-region. Crawley Town Centre comprises of a wide range of shops, entertainment and recreational uses, and cafés, restaurants and bars, making it attractive to visitors.
- 4.17 The Town Centre is broadly defined by Crawley Leisure Park and Town Hall in the north, Pegler Way in the west, Crawley Train Station in the south, and Crawley College in the east.
- 4.18 Crawley Town Centre represents a sustainable location with excellent public transport accessibility, and is serviced by a number of rail and bus links. The Town Centre is located in close proximity to Gatwick Airport and Manor Royal, with direct bus services readily available.

### Town Centre Composition

- 4.19 Crawley is the largest centre in the Borough, and had 399 retail units within the town centre at the time of the health checks.
- 4.20 Spatially, there is a clear distinction between the east and west parts of the Town Centre in terms of composition and function. The eastern part of the Town Centre is the clear retail heart, with County Mall, Queens Square, Queensway and The Martletts predominantly featuring comparison goods retailers. To the west, particularly along the historic High Street, there is a clustering of leisure services and financial and business services. Crawley Leisure Park is located on the northern edge of the Town Centre, and predominantly comprises of leisure services. There are several large format comparison and convenience large-format retailers directly adjacent to the Leisure Park accessed via London Road and Crawley Avenue, including Matalan, Sainsbury's, B&Q and Homebase. However, these retailers all fall outside of the Town Centre boundary.

4.21 Crawley has a comprehensive and diverse offer of retail and services, and this was recognised during the Household Surveys, with “Choice and range of shops” being the most common response when asked what visitors like most about Crawley. Figures 4.1 - 4.4 below provide a comparison between Crawley Town Centre’s current composition and UK averages.

**Figure 4.1 | Crawley Town Centre Composition (Unit Numbers)**



**Figure 4.2 | Town Centre Composition**

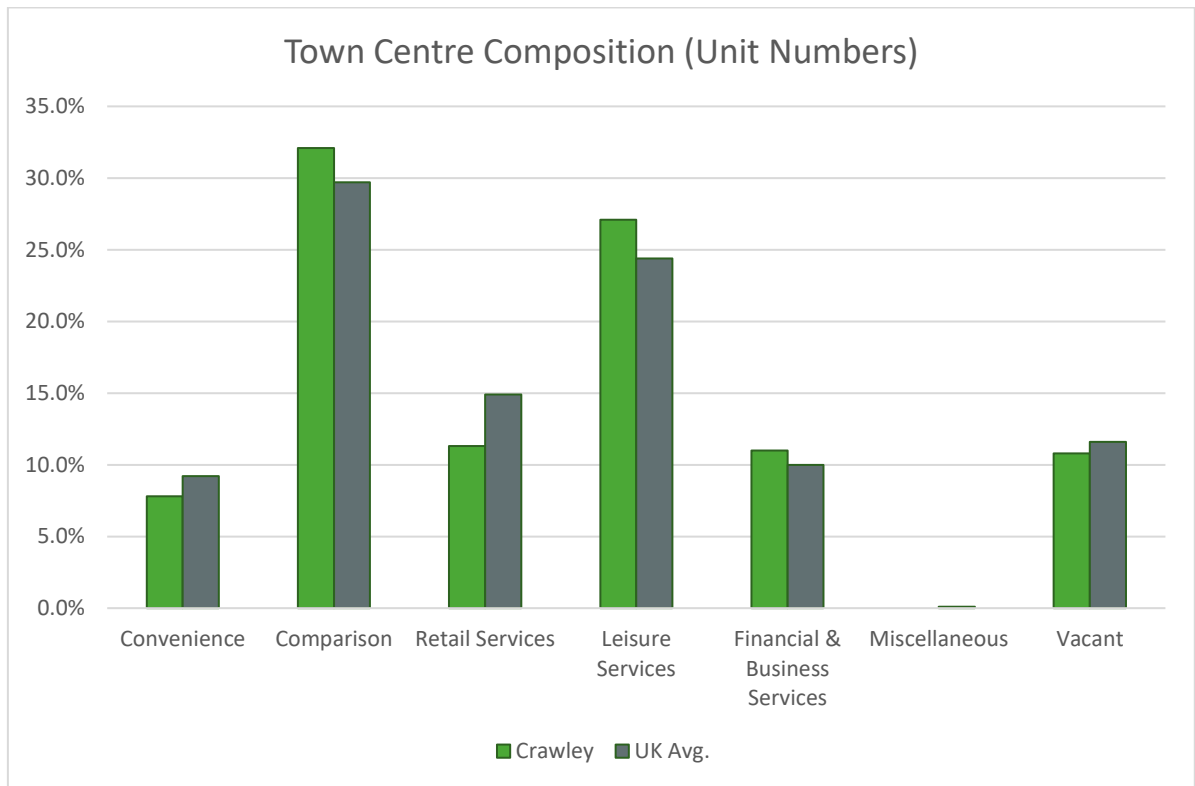
Categories	Crawley Town Centre (2019)			UK Average (May 2019)		Crawley Town Centre (2010)	
	Units (#)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)
<b>Convenience</b>	31	7.8	16.4	9.2	15.4	6.5	11.0
<b>Comparison</b>	128	32.1	41.2	29.7	34.0	46.6	64.6
<b>Retail Services</b>	45	11.3	3.1	14.9	7.0	10.0	3.0
<b>Leisure Services</b>	108	27.1	24.5	24.4	25.4	15.7*	9.6*
<b>Financial &amp; Business Services</b>	44	11.0	5.9	10.0	7.4	13.8	7.6
<b>Miscellaneous</b>	0	0.0	0.0	0.1	0.1	0.0	0.0
<b>Vacant</b>	43	10.8	8.9	11.6	10.2	7.3	4.2
<b>Total</b>	<b>399</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

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

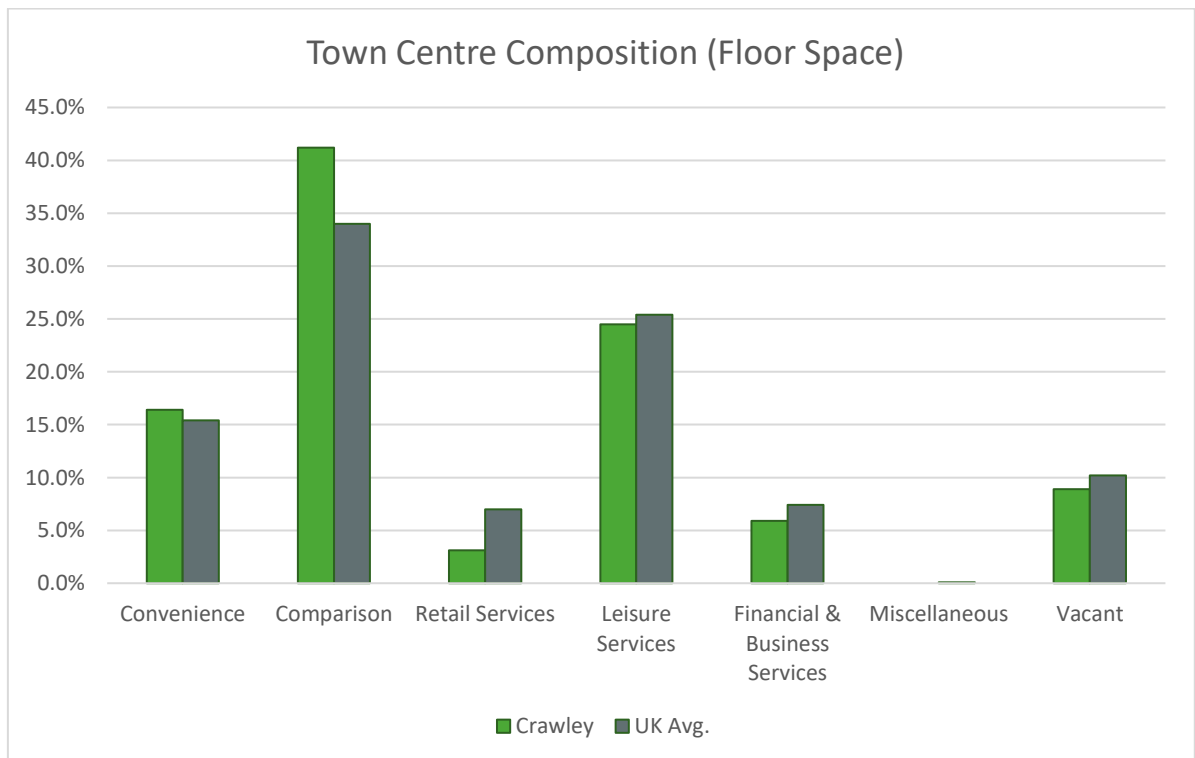
Note: Historic Data sourced from Crawley Retail Capacity & Impact Study 2010.

\*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.

**Figure 4.3 | Town Centre Composition - Comparison with UK Averages (Unit Numbers)**



**Figure 4.4 | Town Centre Composition – Comparison with UK Averages (Floor Space)**



## Convenience and Comparison Goods

- 4.22 Crawley Town Centre has a slightly lower proportion of convenience goods units (7.8%) compared to the UK Average (9.2%). However, turning to floor space, Crawley's convenience goods floor space slightly exceeds the UK average, at 16.4% and 15.4%, respectively.
- 4.23 These figures indicate that Crawley Town Centre features a small number of larger format convenience good units, such as the Asda, which acts as an anchor to the centre, despite its location towards the edge of the town, cut off by Pegler Way.
- 4.24 Historical composition data for Crawley indicates that the proportion of convenience goods stores has seen an increase from 6.5% in 2010, and an increase from 11.0% in floor space over the same period (DTZ, 2010). This growth likely represents the Morrisons superstore within the Town Centre, which opened in 2014, but has recently closed (November 2019).
- 4.25 It is worth noting that there are also large format convenience goods stores outside of the Town Centre boundary, including the Sainsbury's, Crawley Avenue to the north of the Leisure Park, and the Tesco Extra, Hazelwick Avenue, which dominate the convenience good market.
- 4.26 Conversely, Crawley Town Centre's comparison goods offer of 32.1% of units and 41.2% of floor space exceeds the UK average of 29.7% for units and 34.0% for floorspace (significantly so, in terms of floorspace). The Town Centre dominates the comparison goods shopping patterns of residents from the Borough across most categories of comparison goods, indicating the strength of the comparison goods market in Crawley.
- 4.27 However, out of centre retail parks within the Borough provide a significant draw in their own right, generally specialising in bulky goods and complementing Crawley's town centre offer.
- 4.28 Notwithstanding, historical composition data for Crawley indicates that in 2010, 46.6% of units and 64.6% of floor space comprised of comparison goods. Whilst the town has seen a marked reduction in comparison goods offer over the past decade, this reflects wider national trends.
- 4.29 Nonetheless, the ongoing prominence of comparison retailers in the Town Centre is reflective of the strength of its offer, particularly with regards to the County Mall Shopping Centre, which continues to perform well in somewhat testing times.



## Services

- 4.30 Considering the composition of service units within the Town Centre, Crawley has a higher than average proportion of leisure services and a lower than average proportion of retail services. The proportion of financial and business services meanwhile is marginally higher than the UK averages.
- 4.31 In recent years, centres have typically seen a growth in service provision, often replacing struggling retail facilities. However, the strength of Crawley's comparison retail offer in particular has seemingly kept the increase in retail services at bay, with the proportion of health and beauty facilities, opticians and tailors broadly at 2010 levels.
- 4.32 Leisure services such as cafés, fast food takeaways, restaurants, pubs and bars, on the other hand have grown broadly in line with UK averages. Spatially, Crawley's leisure service offer is almost entirely spread across two locations, the historic High Street to the west of the centre and Crawley Leisure Park, located within the Town Centre boundary, to the north west of the primary town centre.
- 4.33 Given the projected growth in the Town Centre's residential population, we would anticipate the proportion of leisure services in the centre to grow as the indigenous population would be less likely to travel and has the potential to fuel further growth in Crawley's café culture.

## Vacancies

- 4.34 The proportion of vacant units (10.8%) and vacant floor space (8.9%) in Crawley falls below the UK averages of 11.6% and 10.2% respectively, indicating resilience in the Town Centre.
- 4.35 Compared to other local planning authorities across the South East, who have undertaken retail studies since 2012 (post-recession), it is noted that the proportion of vacant units in Crawley Town Centre is marginally higher than a few surrounding authorities.
- 4.36 However, some centres (Tunbridge Wells, Halisham, Crowborough, Selsey, and Burgess Hill in particular) show considerably higher vacancy rates.
- 4.37 A summary of authorities reviewed is provided in Figure 4.5 below. The average proportion of vacant units is 7.3%, though it should be noted that some of this data is almost 8 years old, and as such should not be considered directly comparable.

**Figure 4.5 | Comparison of Vacant Unit Rates in surrounding Boroughs**

LPA	Centre	Vacant Units	Date	Source
Chichester	Chichester City Centre	7.8%	2018	Chichester Retail and Main Town Centre Uses Study (2018)
	Selsey	12.0%	2018	
	East Wittering	5.8%	2018	
Tunbridge Wells	Tunbridge Wells	16.5%	2017	Tunbridge Wells Borough Retail and Leisure Study (2017)
Horsham	Horsham	7.3%	2017	Horsham Town Retail & Leisure Study (2017)
Epsom & Ewell	Epsom	6.0%	2015	Epsom & Ewell Borough Council Retail Study Update (2015)
Tandridge	Tandridge	8.6%	2015	Tandridge Retail and Leisure Study (2015)
	Oxted	3.1%	2015	
Wealden	Hailsham	12.5%	2015	Wealden Town Centre and Retail Study (2016)
	Uckfield	7.2%	2015	
	Crowborough	11.5%	2015	
	Heathfield	3.0%	2015	
	Polegate	3.0%	2015	
	Forest Row	6.0%	2015	
	Wadhurst	0.0%	2015	
Mid Sussex	Burgess Hill	13.2%	2014	Mid Sussex Retail Study Update (2014)
	East Grinstead	7.7%	2014	
Waverley	Farnham	9.0%	2012	Waverley Borough Council Town Centres Retail Study Update (2013)
	Godalming	7.0%	2012	
	Cranleigh	3.0%	2012	
	Haslemere	3.0%	2012	
<b>Average</b>		<b>7.3%</b>		

4.38 Notwithstanding, historic composition data indicates vacancies have increased since 2010. Specifically, at the time of the 2010 Retail Study, only 7.3% of units and 4.2% of floor space within Crawley Town Centre was vacant. This is unsurprising given the changes in town centre economies since 2010, however, the relative resilience of Crawley in retaining vacancy rates below national averages is noted.

4.39 Spatially, Haslett Avenue West and the junction of High Street and Pegler Way represent a challenge to the vitality of the Town Centre, given the high concentration of vacant units. Nonetheless, vacancies tend to be spread relatively evenly across the rest of the centre.

## Miscellaneous

4.40 At the time of the health check site visits, there were no miscellaneous units within Crawley Town Centre. Miscellaneous units include all other retail facilities not otherwise defined, including uses such as internet cafes.

## Customers' Views and Behaviour

4.41 Our Household Telephone Survey suggests that the Study Area derived retail turnover of the town centre is approximately £513.4m per annum (see Tables 4, 7-25 at **Appendix D**). Importantly, this does not include the turnover of service uses.

4.42 The breakdown in the estimated turnover of the Town Centre is as follows:

**Table 4.6 | Breakdown of Town Centre Retail Turnover (Scenario 1)**

Categories	Turnover per annum
<b>Convenience</b>	£89.2m (17.4%)
<b>Clothing &amp; footwear</b>	£164.2m (32.0%)
<b>Books etc.</b>	£22.8m (4.4%)
<b>Household goods</b>	£89.6m (17.5%)
<b>Recreation goods</b>	£85.5m (16.7%)
<b>Chemist goods</b>	£7.9m (1.5%)
<b>Electrical goods</b>	£27.6m (5.4%)
<b>DIY goods</b>	£6.1m (1.2%)
<b>Furniture goods</b>	£20.5m (4.0%)
<b>Total Retail</b>	<b>£513.4m</b>

Source: Appendix D, Tables 4, 9-25

4.43 The Household Survey undertaken by NEMS in August 2019 sought to determine how frequently respondents visited a particular centre. When respondents identified that they visited Crawley Town Centre most frequently, they were asked what they liked most about the centre.

4.44 The most popular responses were the choice and range of shops available (35%) and that it was closest to home (33%). However, a relatively significant 14% of respondents could not identify anything in particular that they liked about the centre. Other reasons included proximity to work (4%),

convenient car parking (3%) and choice of leisure services (3%).

4.45 Conversely, when asked what would encourage them to visit Crawley Town Centre more often, the most repeated response was an increased range of shops (19%) and a cheaper parking (10%). Other responses given included a better environment (6%), improved quality of shops (4%) and more parking (4%). The broad mix of responses received are not unexpected, and broadly align with Nexus Planning's experiences undertaking previous Retail & Leisure Studies.

4.46 Whilst these areas identified were the highest 'specific' priorities, the majority of respondents did not identify anything in particular that would encourage them to visit the Town Centre more frequently. We consider this response to be a positive sign, as it suggests that there are no clear dislikes about the Crawley.

4.47 Respondents who stated that they did not visit Crawley Town Centre were also asked why not. The most frequent response was that Crawley Town Centre was too far away from home (37%). A further 22% of respondents stated that they did not have any particular reason to visit.

### Retailer Representation and Balance of Independent and Multiple Stores

4.48 Crawley Town Centre includes an extensive list of national multiples and major retailers, which is testimony to it being the largest centre within the Borough, and a sub-regional centre. At the time of Nexus' survey, 24 retailers within Crawley were national multiples listed on Experian's 31 major retailer list, including Debenhams, Superdrug, H&M, Waterstones and Argos.

4.49 Whilst the centre features numerous national retailers, the Town Centre has only a limited number of high-end retailers, and few independent retailers.

4.50 Independent retailers within the Town Centre included Mabu Leather, Jill's Sewing Room, The Boulevard Florist and James Stephen Jewellers. These independent stores are generally located outside of the County Mall and Queen's Square precinct of the Town Centre, and are more common along The Boulevard, The Broadway and Broad Walk.

4.51 When considering the representation of cafes and restaurants in the Town Centre, there are a number of national providers represented, including Costa Coffee, Subway, TGI Fridays, and Pizza Express. However, the Town Centre has a good mix of independent cafes and restaurants, predominantly

clustered along the High Street, including Crow Café, The Old Punchbowl and Octopus Bar, as well as La Rusta which fronts onto Queen's Square.

- 4.52 Traditionally, national multiples have been regarded as one of the most important factors in improving the consumer appeal of a centre. However, there is evidence that centres with a higher proportion of independents are more resilient than those with a predominance of national multiples, given the recent struggles effecting national multiple retailers. A good balance of independents and national retailers and restaurants can often positively influence the perception and attractiveness of a centre.

### Average Prime Rents

- 4.53 The average prime rent within the Town Centre (not including County Mall) was £35.65 per sq ft per annum (pa), on the basis of properties actively being marketed in the centre during October 2019<sup>43</sup>. The highest recorded rent was £45.45 per sq ft pa for a small single-storey retail unit on the High Street. The next highest recorded rent was £43.65 per sq ft pa on The Martletts. Conversely, the lowest recorded rent was £29.31 per sq ft pa on Queensway.
- 4.54 At the time of this Study, there was one retail unit being actively marketed within the County Mall, at a rate considerably higher than the Town Centre average (£89.45 per sq ft pa). However, without any other publicly comparable data from County Mall, it is unclear whether this is an anomaly.
- 4.55 Crawley's rental prices are found to be higher than comparable town centres, suggesting that factors such as the draw of surrounding town centre retailers and widely available parking spaces continue to attract higher rents. The average prime rent in Horsham Town Centre was £27.19 per sq ft pa as of October 2019, whilst East Grinstead was £27.79 per sq ft pa and Horley was £14.54 per sq ft pa<sup>42</sup>.

### Pedestrian Footfall and Flows

- 4.56 Noggins footfall data for Crawley Town Centre across the 2018 calendar year indicated an average monthly footfall of 545,000. Months generating highest levels of footfall were December (816,000) and March (770,000), whilst October reported the lowest levels (306,000).

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<sup>43</sup> Based on Zoopla and Primelocation data (October 2019)

- 4.57 From Nexus' site visits to the Town Centre, the highest levels of footfall were observed within the County Mall, around Queen's Square and on The Martletts. Memorial Gardens was also well utilised during each of Nexus' visits to Crawley. Limited footfall was observed along the High Street and Pegler Way. Pedestrian visitors were not observed within Crawley Leisure Park, which (whilst located within the Town Centre) appears to function more as an out-of-centre style retail park, with a heavy focus on private vehicles.
- 4.58 One key barrier to pedestrian footfall was the physical guard rails located along College Road (A2004) and the western boundary of Crawley College. In combination, these physical features are considered to segregate the main retail heart of the Town Centre from the College, thus limiting pedestrian flows.

### Accessibility

- 4.59 Crawley Town Centre has a good level of public transport accessibility, with Crawley Train Station located within the Town Centre boundary. Crawley Train Station has frequent services to London Victoria and London Bridge (two trains per hour), via Gatwick Airport. The station also has frequent services to Horsham and Bognor Regis (two trains per hour).
- 4.60 In addition to train connections between Crawley and Gatwick Airport, there are also several bus services available, including the Fastway10, which operates 24 hours a day. Good transport links between Gatwick Airport and the Town Centre provides a latent opportunity for Crawley Town Centre to serve as a key stopover destination for travellers and tourists. Bus services also operate across the Town Centre with the bus station conveniently located at the side of County Mall Shopping Centre, and on the opposite side of the road to the train station.
- 4.61 In terms of vehicular access, the Town Centre benefits from good road transport linkages, being just 2 miles from Junctions 10 and 11 of the M23 Motorway. There are around 4,000 car parking spaces in Crawley Town Centre, provided across a combination of public and private car parks. The Council operates a number of public car parks, including the Town Hall Multi-Storey, Orchard Street Multi-Storey, Crawley Hospital, Crawley Library and Tilgate Park. There are also a number of privately run car parks, the largest of which are the County Mall Car Park and Kingsgate Car Park, which comprise of approximately 1,700 and 500 parking spaces respectively. At the time of the site visits, it was observed that there was good availability of parking spaces within the existing car parks.

- 4.62 One key accessibility issue apparent within the Town Centre is linkages between the main centre and the leisure park. In particular, the car park associated with the Leisure Park enforces strict restrictions on visitors. Specifically, visitors who park in the Leisure Park can be fined if they are observed leaving the Leisure Park. This arrangement creates a clear barrier, preventing cross-purpose trips, and may be limiting visitors from spending time and money in the rest of the Town Centre, and vice versa.

**Figure 4.7 | Car Parking Availability in Crawley Town Centre**



### Perception of Crime and Safety

- 4.63 The Police UK Database<sup>44</sup>, published by the Home Office reports that between September 2018 and August 2019 there were 2,193 incidences of crime within Crawley Town Centre. Of the total crimes, 23% were reported as violence and sexual offences, 19% were listed as anti-social behaviour, and 19% were shoplifting. When considering the spatial distribution of crime, the Police UK database reports the highest frequency of occurrences along High Street, as well as near Crawley Train Station and the County Mall.
- 4.64 From Nexus' visits to the town centre, both during the day time and during the evening, the centre was well lit and legible, and felt safe. The presence of CCTV cameras was also noted, as was high pedestrian activity providing natural surveillance. However, during the site visits it was noted that

<sup>44</sup> Police UK – <https://www.police.uk/sussex/WR5NH3/crime/stats/>



there were some instances of damaged shopfronts and graffiti observed. These were clustered in the south western part of the centre and generally aligned with areas of vacancies and a lack of occupied active frontages.

### Environmental Quality

4.65 Public realm across Crawley Town Centre has improved in recent years, having undergone significant regeneration. This has centred around £5.4m of improvements to Queens Square, the heart of the town centre, and the adjoining streets (Queensway, The Pavement). The Town Centre Regeneration Programme commenced in 2015, with the regeneration of Queen's Square. This included enhanced landscaping and construction of a level water fountain, creating a focal point within the centre of Crawley, and greatly enhancing the environmental quality of this part of the centre.

**Figure 4.8 | Queen's Square**



4.66 When Nexus carried out their site visits, there were public realm works ongoing along Queensway (Figure 4.9). These works included repaving and improving street lighting to complement the previous works to Queen's Square and have now been completed. Whilst in the short term, these works created barriers to movement, now that they are complete, the environmental quality of Queen's Square and the surrounding streets is considerably enhanced, providing positive and effective public realm through regeneration.



**Figure 4.9 | Works ongoing at Queensway**



**Figure 4.10 | Completed works at Queensway**



4.67 The environmental quality of the High Street is also good, and contributes positively to the character of the immediate area. In particular, the combination of modern and traditional features, such as the inclusion of sculptures (Figure 4.11), the soon to be updated Crawley Conservation Area Map (4.12), and the recently refurbished Golden Tree sculpture (4.13) create an attractive public realm, and capitalise on the historic character of the High Street.

**Figure 4.11 | Sculpture Art on High Street**



**Figure 4.12 | High Street Conservation Area Map**



**Figure 4.13 | Refurbished Golden Tree sculpture**

- 4.68 The Memorial Gardens is considered to contribute positively to the overall quality of the Town Centre environment. Specifically, the Gardens bring an attractive, peaceful setting to the eastern part of the Town Centre, and likely facilitates longer dwell time for visitors. The recently completed Queensway regeneration has also improved access and legibility between Memorial Gardens and the wider town centre.
- 4.69 The only parts of the Town Centre with a lower environmental quality were along Haslett Avenue West and its junction with the Broadway, where several vacant units have left the street slightly tired in appearance. It is noted that the redevelopment of 15-29 the Broadway is well underway and, once completed, will likely enhance the environmental quality of this part of the Town Centre.
- 4.70 The environmental quality of Crawley Leisure Park was also lacking, primarily due to the dominance of large car parking areas, which do not contribute positively to public realm.

#### Barriers to new businesses opening and existing businesses expanding

- 4.71 Potential barriers to new businesses opening and existing businesses expanding can often be linked to unit sizes, unit locations and any restrictive planning policies.
- 4.72 The average unit size within Crawley Town Centre is 294 sq m and the median is 130 sq m, with units

ranging from 10 sq m to 8,430 sq m.

- 4.73 Notably, this is broadly consistent with the average (261 sq m) and median (150 sq m) size of vacant units, which range from 20 sq m to 1,180 sq m. Whilst there are several larger vacant units (7 units exceeding 500 sq m), the comparable sizes across vacant and non-vacant units suggests that there is no direct link between unit size and vacancy in Crawley.
- 4.74 We the turn to the location of vacant units, which are predominantly clustered on the High Street. Specifically, there are 10 vacant units on the High Street. Other streets within the Town Centre have fewer vacancies. In particular, Queensway has six vacant units, Haslett Avenue West has four vacant units, Ifield Road has four vacant units, and all other streets have fewer than four. Ifield Road should be noted, as there are relatively few retail units on this road within the Town Centre boundary, and as such four units represents a fairly high vacancy rate.
- 4.75 Spatial arrangement, or clusters, of vacant units have the potential to result in poor environmental quality or vitality challenges. As a result, areas with clusters of vacant units, such as the High Street, can present clear barriers to the opening of new businesses or expansion of existing businesses.
- 4.76 It is noted that High Street and Ifield Road are within a Conservation Area, and Policy CH13 of the Crawley Local Plan 2015-2030 controls development within this part of the Town Centre. This policy requires that a Heritage Impact Assessment be provided as part of any planning application, to demonstrate that the development proposal conforms to the relevant Conservation Area Statement and Appraisal.
- 4.77 It is possible that sites within the High Street Conservation Area are considered to pose a greater risk to businesses. Particularly, the more stringent heritage policy requirements, applicable to these sites may make them less attractive as compared to sites on the eastern side of the Town Centre, which are not affected by this Conservation Area.
- 4.78 On a positive note, Crawley Town Centre Partnership has appointed Savills to develop a Business Improvement District (BID) in the Town Centre. Crawley businesses voted in favour of the BID in November 2019, unlocking considerable investment in the Town Centre over the next five years. The BID will commence delivery in April 2020.
- 4.79 The aim of the BID is to give local businesses an opportunity to have a say in the development of the

Town Centre. The BID will help facilitate economic growth in the town centre, as well as supporting business needs, which will assist with combating existing barriers. In particular, the BID seeks to facilitate a safe town centre environment, promote Crawley to consumers, facilitate events to increase footfall and assist with networking opportunities to help local and new businesses feel connected with the Town Centre.

### Night Time Economy

- 4.80 Crawley's night time offer predominantly comprises of restaurants, pubs and bars situated in the western part of the Town Centre (along High Street and Pegler Way), as well as the Cineworld and Hollywood Bowl located within the Leisure Park.
- 4.81 Whilst the north and west parts of the Town Centre provide a relatively strong night time economy offer, the south and eastern part of the Centre have limited uses operating in the evening. The presence of the Admiral Casino and Buzz Bingo are acknowledged, however, neither of these uses provide active frontages that offer 'night time surveillance', and therefore do not enhance the perceived safety of this part of the Town Centre.
- 4.82 Nexus acknowledges the presence of Moka Nightclub on Station Way, directly adjacent to the Train Station and opposite the County Mall. The Moka nightclub is open late three nights per week (Friday, Saturday and Tuesday). Notwithstanding, planning permission was recently granted (subject to a legal obligation) for the demolition of the night club and redevelopment for residential purposes.

### Stakeholder Feedback

- 4.83 Stakeholder feedback highlighted that smaller retail units were particularly sought after within the Town centre, with a distinct lack of availability for units under 300 sq m. However, this may just be a perceived lack of availability, as through our health check, we identified that almost 70% of the vacant units in Crawley are under 300 sq m.
- 4.84 Stakeholders raised concerns regarding the environmental quality of, and pedestrian flows along, the Historic High Street and the Broadway. In particular, it was noted that these parts of the Town Centre appeared tired, and there were felt to be challenges with retaining businesses.
- 4.85 The success of events within the Town Centre was highlighted, with a number of activities scheduled

over the coming months within Queens Square (Continental Street Market), Memorial Gardens (Outdoor Cinema) and even the County Mall Shopping Centre (Zombie Nightmare Survival Experience). A calendar of these events are advertised on a digital display within Queens Square.

- 4.86 Finally, it was acknowledged that the high levels of car parking availability was a draw to the Town Centre, as visitors could be assured that they would be able to find a space, which they could not always say for other nearby centres.

### Conclusions

- 4.87 Overall, Crawley Town Centre is performing well, with a healthy mix of retail and service uses, relatively low vacancy rates and resilience in the comparison goods sector.
- 4.88 The very accessible location of the Town Centre, with excellent public transport accessibility and a high availability of car parking spaces is seen as a significant draw, encouraging visitors to visit Crawley over other centres.
- 4.89 Furthermore, recent public realm works, particularly around Queen's Square have improved the environmental quality of the centre, which is paying off, with this part of the Town Centre observed as having high pedestrian footfall at the time of Nexus' visits.
- 4.90 One area of concern is the historic High Street, which demonstrates a clustering of vacant units, and was identified as having lower pedestrian footfall than other parts of the Town Centre. The High Street was also identified by stakeholders as being more tired than the rest of the Centre.
- 4.91 Additionally, the connectivity of the Leisure Park to the remainder of the Town Centre presents a challenge. Physically the Leisure Park is separate from the main Town Centre, and the car parking oriented design of the Leisure Park encourages vehicular use, which in turn may discourages linked-trips. Notwithstanding, it is evident that the Leisure Park is performing well, with no vacant units identified.
- 4.92 Qualitatively, at the time of the Household Survey, convenience good spending by Crawley residents was dominated by the four largest foodstores, though only one (Morrisons, Pegler Way, which has since ceased trading) was located in the Town Centre. This provision is complemented by two out-of-centre discount foodstores that also attract a notable proportion of trade. The total proportion of



convenience goods retail spending by residents of Crawley to facilities within the Borough has risen over the past decade to over 90%.

4.93 Whilst we would encourage the Council's efforts to find an occupier for the (now vacant) Morrisons building, we do not consider the Borough, or Town Centre, to have any specific qualitative convenience need.

4.94 In comparison goods terms, Crawley has proved remarkably resilient over recent years (with its market share dropping only marginally from 57% in 2010 to 53% in 2019) despite retail spending patterns evolving as town centres across the country have increasingly moved towards retail and leisure services to occupy units and provide footfall.

4.95 This resilience partly due to the offer of the Town Centre (supported by County Mall Shopping Centre), as well as the strength of County Oak and Acorn Retail Parks. Notably, large towns and retail destinations surrounding Crawley only attract a limited proportion of spending from residents of Crawley across the majority of comparison goods categories, further demonstrating the relative qualitative strength of Crawley's comparison offer.

## Neighbourhood Parade Consideration

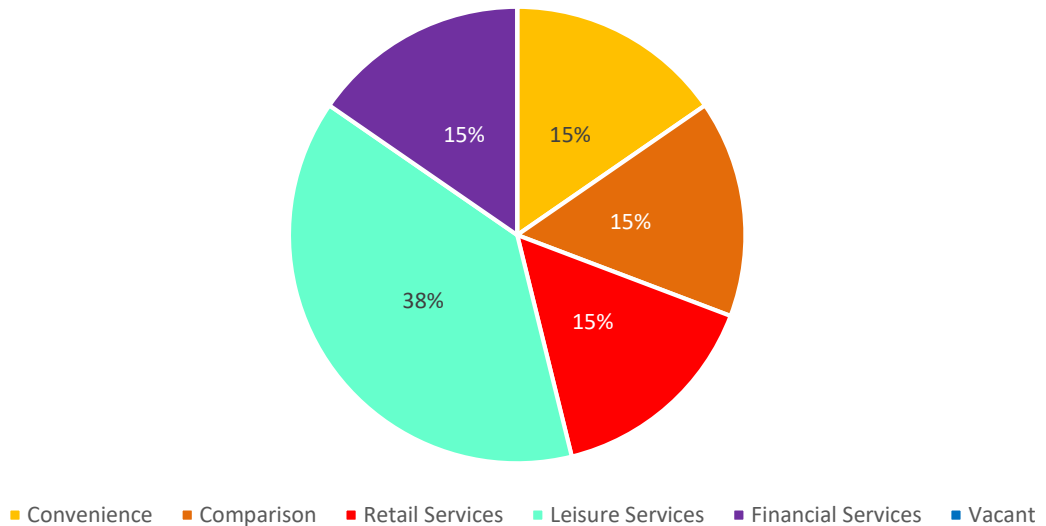
4.96 As a New Town, Crawley has been built in accordance with the neighbourhood principle, with each residential neighbourhood providing its own local shops, facilities and services to support the day-to-day needs of residents. In this Section of the Study, we provide a snapshot of the current composition and environmental quality of each of these Neighbourhood Parades.

### Southgate Parade

4.97 The prevailing use within Southgate Parade is leisure services with four takeaway shops and a bookmakers. The centre featured a range of other retail and service uses, with no vacant units noted. Southgate Parade also featured considerable landscaping, particularly in the north. This creates an attractive public realm, which also benefits from seating areas.

4.98 It was interesting to note that the Parade is directly adjacent to the Downsman Pub; however, this premises is excluded from the Council's parade boundary. The Downsman Pub is considered likely to positively contribute to the Parade as a whole, and should be included within the boundary.

**Figure 4.14 | Unit Composition - Southgate Parade**



**Figure 4.15 | Southgate Parade**

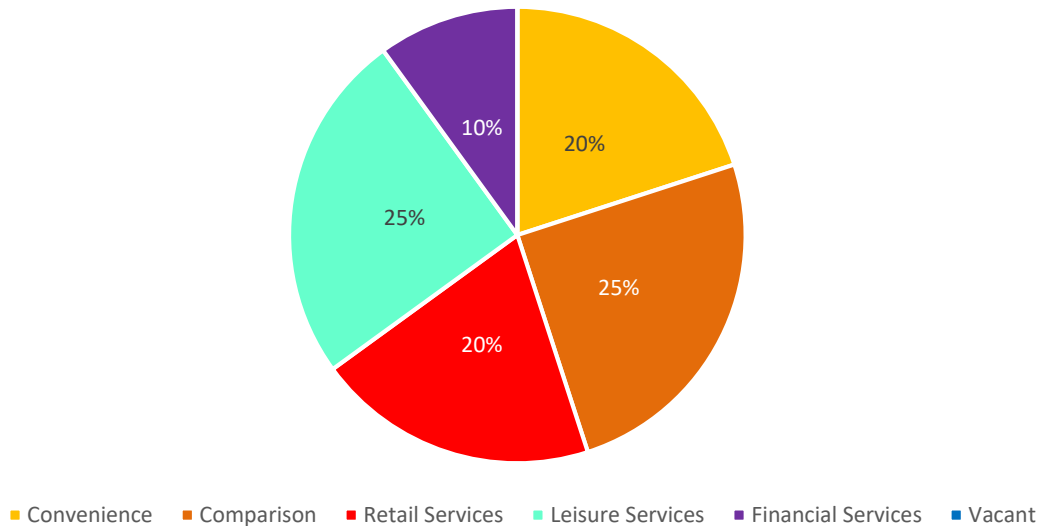


### Tilgate Parade

4.99 Tilgate Parade is a comparably large centre, comprising of 20 units, with a wide range of retail and service uses present, and no vacancies. The parade benefits from a large car park and a number of cycle parking stands, with attractive landscaping.

4.100 We would suggest the Council review the boundaries of Tilgate Parade, as the centre is directly adjacent to a pub (The Grasshopper), and a BP petrol filling station, which also contains a SPAR. These facilities are considered likely to generate a number of trips to Tilgate Parade, and therefore could reasonably be included within the boundary of the centre.

**Figure 4.16 | Unit Composition - Tilgate Parade**



**Figure 4.17 | Tilgate Parade**



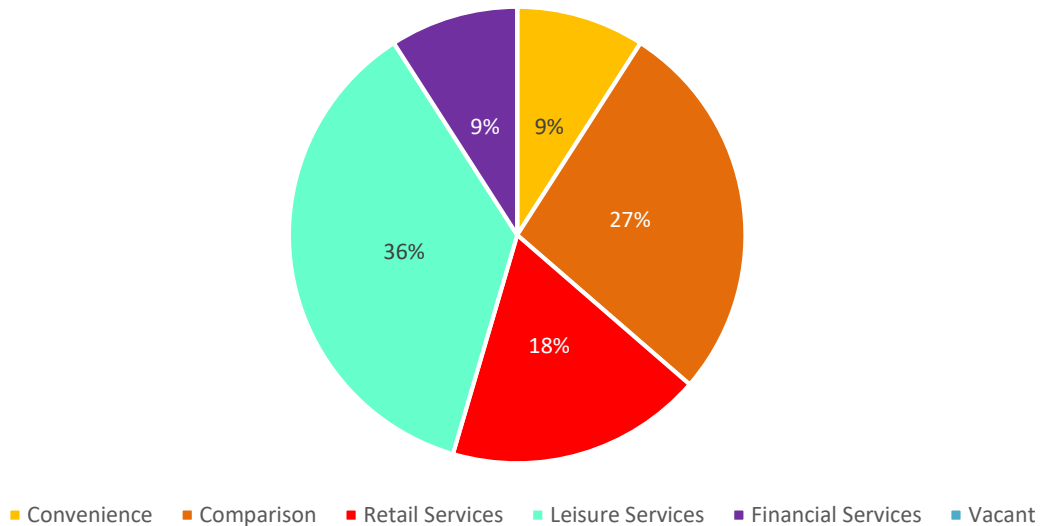
Furnace Green

4.101 Furnace Green Parade comprised of 11 retail units, providing a range of retail uses and services (Figure 4.18), with no vacancies at the time of Nexus’ visit. It was interesting to note that the centre is directly adjacent to the Charcoal Burner Pub; however, this premises is excluded from the designated boundary.

4.102 At the time of Nexus’ visit to Furnace Green, the centre was relatively empty, with limited pedestrian footfall. The design of the centre is vehicle dominated, with a large car parking space between Furnace Green and the shops.



**Figure 4.18 | Furnace Green Parade - Unit Composition**



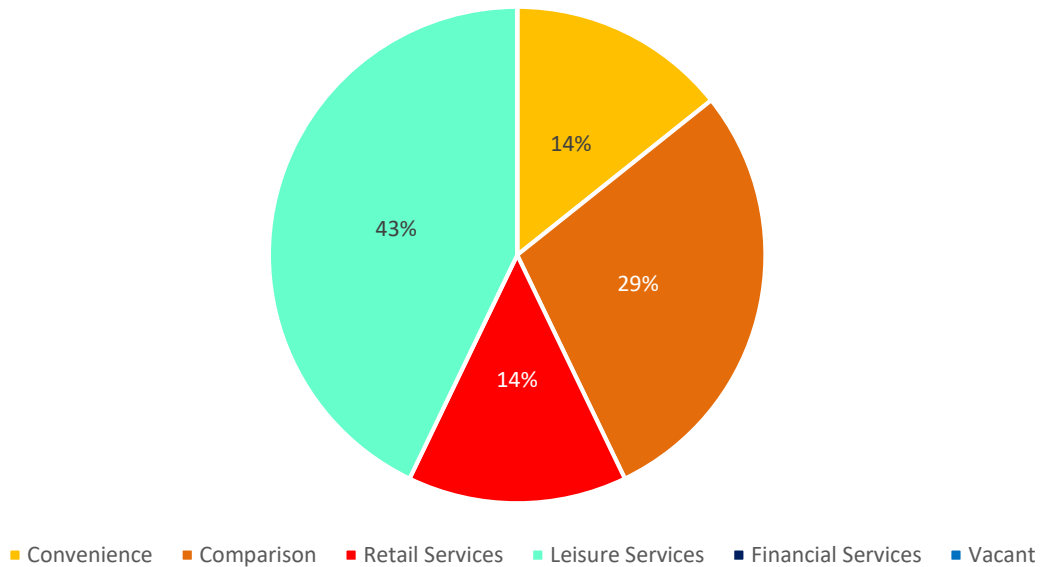
**Figure 4.19 | Furnace Green Parade**



West Green Parade

4.103 West Green Parade is a small retail centre comprising of seven units. No vacancies were recorded during Nexus’ site visit. The most prevalent use was leisure services, with several cafes and takeaway units. The centre provides basic public realm features, including seating, bins, and some landscaping, as well as a number of parking spaces and cycle parking stands.

**Figure 4.20 | Unit Composition – West Green Parade**



**Figure 4.21 | West Green Parade**

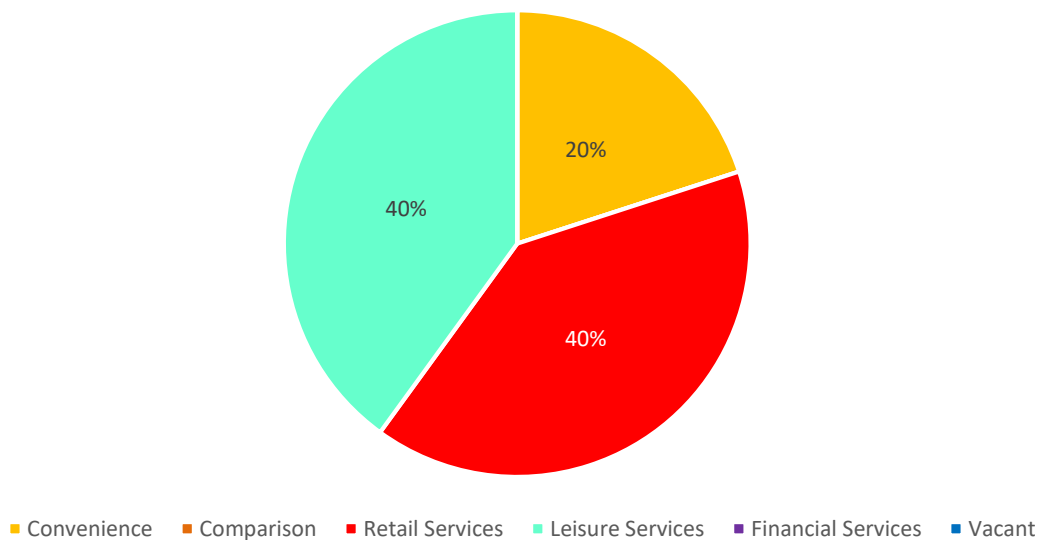


Peterhouse Parade

4.104 Peterhouse Parade is small and linear in nature. The centre features just five units, including a Tesco Express, a takeaway shop, a restaurant, a hairdresser and an undertakers. There was good car parking availability at the time of Nexus’ visit, and it is noted that the centre also benefits from several cycle parking stands.

- 4.105 Overall, the environmental quality of the Parade was poor when compared to other retail complexes visited. Specifically, there was limited street furniture, the centre looked tired, and there were some instances of graffiti.
- 4.106 As with other centre visited, we noted that Tavern on the Green Pub was directly adjacent to Peterhouse Parade. However, this pub is excluded from the centre’s designated boundary. The Tavern on the Green is considered to positively contribute to the centre as a whole, and should be included within the boundary.

**Figure 4.22 | Unit Composition – Peterhouse Parade**



**Figure 4.23 | Peterhouse Parade**

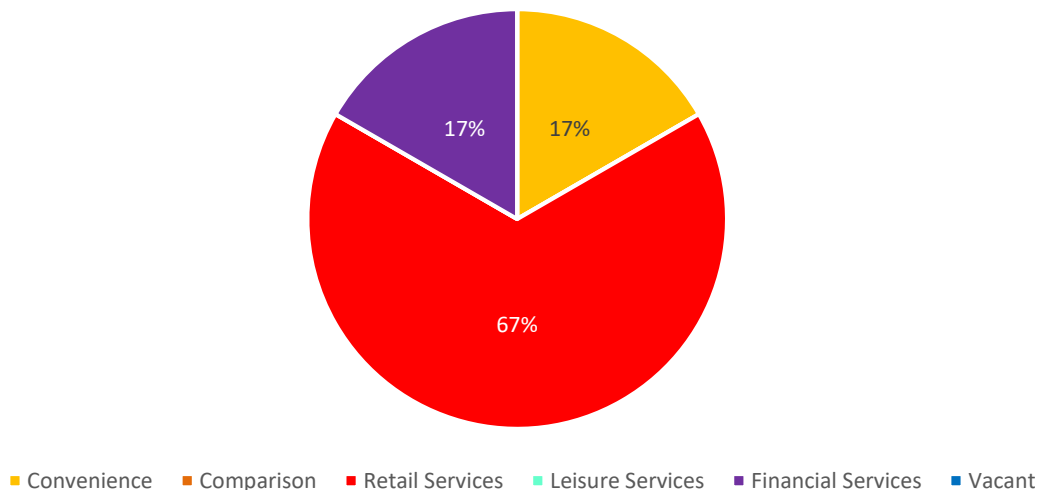


## Shire Parade

4.107 Shire Parade is a small, linear strip mainly comprising of retail services, such as hair salons and barbers. The centre does benefit from a Budgens for convenience goods, as well as an Estate Agent, but overall, the retail and services offer is limited. Notwithstanding, the car park was almost fully occupied on the day of Nexus’ visit, indicating good usage. Furthermore, there were no vacant units.

4.108 The centre’s car park is accessed from the Ridings. Given the configuration of the car park, and its single shared entrance / exit point, it is difficult for visitors to manoeuvre in and out if the car park is relatively full, detracting from its day-to-day function for local residents.

**Figure 4.24 | Shire Parade Unit Composition**



**Figure 4.25 | Shire Parade**

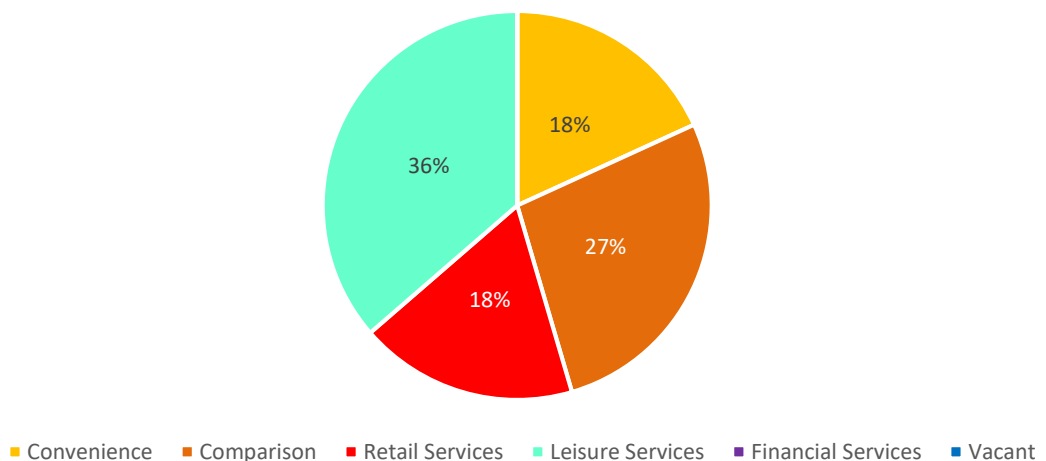




### Pound Hill Parade

- 4.109 Pound Hill Parade is L-shaped in configuration, and comprises of a mixture of retail and service uses. The Co-operative foodstore is a key convenience goods retail anchor for the complex.
- 4.110 The centre has good vehicle access, with a number of parking spaces available at the time of Nexus' visit. There were also a number of cycle parking stands available.
- 4.111 Whilst the centre benefits from some street furniture and landscaping, the overall impression of the public realm was that it was quite tired in appearance.

**Figure 4.26 | Pound Hill Unit Composition**



**Figure 4.27 | Pound Hill Parade**

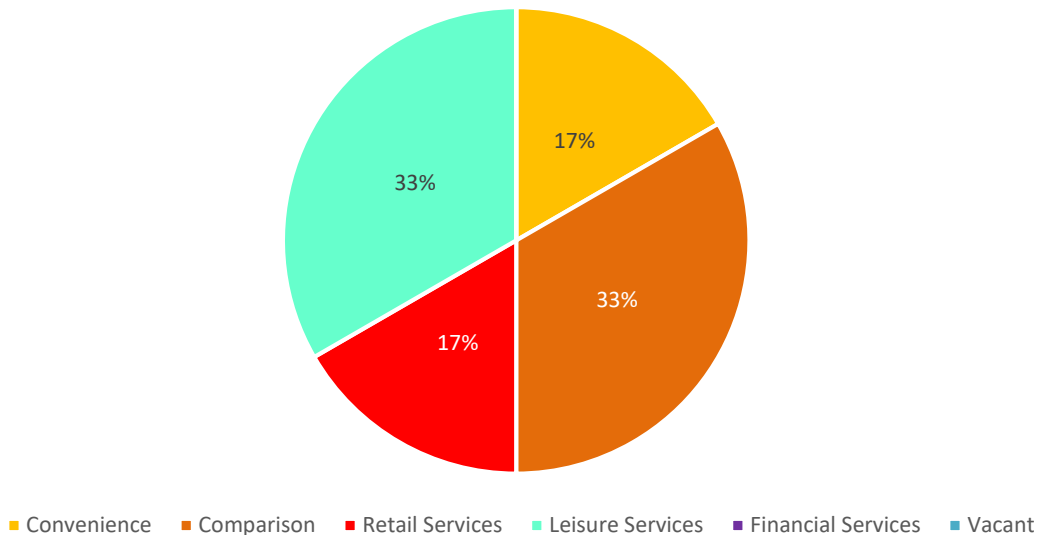


Gales Drive, Three Bridges

4.112 Gales Drive provides a mix of convenience and comparison goods retailers and retail and leisure services, with no vacant units at the time of Nexus’ visit. Gales Drive had good accessibility, with wide car and cycle parking availability.

4.113 It is worth noting that restaurant / café (Café 89, Figure 4.30), has been excluded from Gales Drive designated boundary. It is considered that this café makes a positive contribution to the centre, providing a dine-in option, and enabling visitors to stay longer and should be considered for inclusion within the centre.

**Figure 4.28 | Unit Composition – Gales Drive**



**Figure 4.29 | Public Realm at Gales Drive**



**Figure 4.30 | Cafe 89, excluded from the Centre**

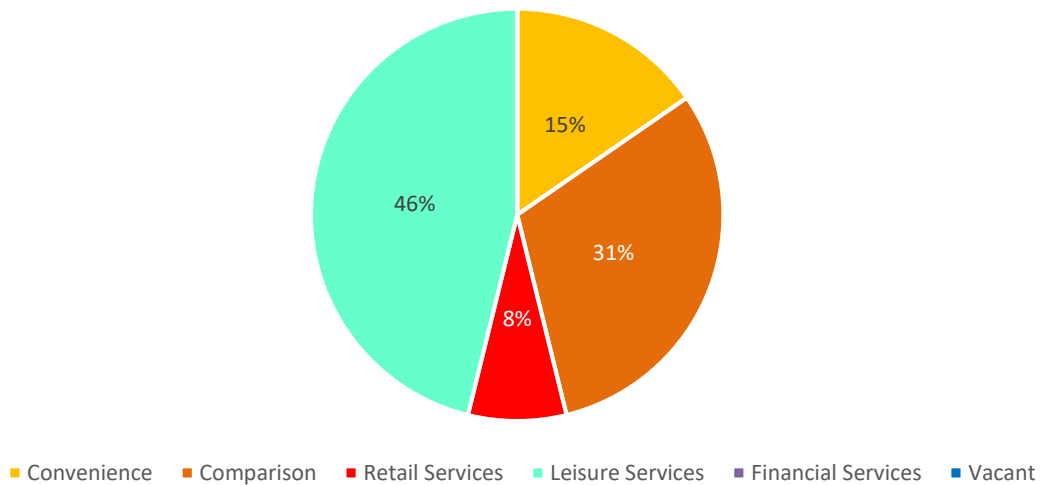


## Northgate Parade

4.114 Northgate Parade predominantly comprises of leisure services, such as takeaways and betting shops, with some convenience and comparison goods retailers, and a hairdresser (retail service). There were no vacancies recorded within the centre at the time of Nexus' visit. Northgate Parade features a substantial car park, and several cycle parking stands. Whilst the car park features landscaping, the main retail strip's public realm is lacking (Figure 4.32).

4.115 It was noted that Efes BBQ restaurant (Figure 4.33) directly adjoins the centre, and shares the same car parking facilities, but is excluded from the Council's definition of the centre. It is considered that the restaurant likely makes a positive contribution to the centre and should be included within the centre's boundaries.

**Figure 4.34 | Unit Composition – Northgate Parade**



**Figure 4.32 | Northgate Parade Public Realm**



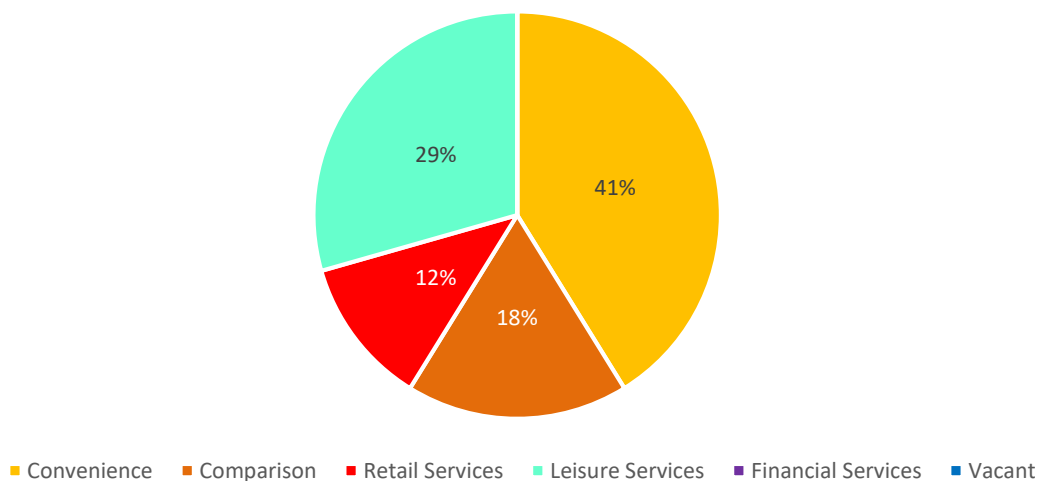
**Figure 4.33 | Efes BBQ - Adjoining Northgate**



## Langley Green

- 4.116 Langley Green is an L-shaped centre, with an internal roundabout car park. The centre features a range of convenience good retailers, including the Co-operative, as well as a number of takeaway shops.
- 4.117 The environmental quality of Langley Green includes landscaping, decorative seating boxes and lighting posts. Pedestrian footfall was high at the time of Nexus’ site visit.
- 4.118 It was noted that the Dr Samuel Johnson Pub directly adjoins Langley Green, and shares the same car parking facilities, but is excluded from the centre’s boundary. It is considered that the Pub likely provides a positive contribution to the centre and should be included within the centre’s boundaries.

**Figure 4.34 | Unit Composition – Langley Green**



**Figure 4.35 | Langley Green Parade - Public Realm**

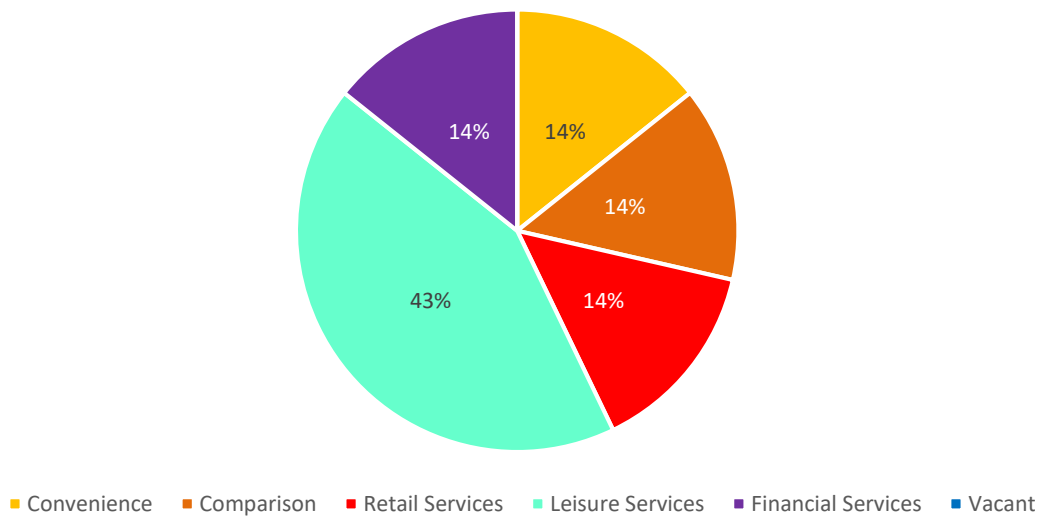




## Maidenbower Square

4.119 Maidenbower Square featured a mix of retail and service uses. As with the majority of other neighbourhood parades visited by Nexus, the predominant use was leisure services. However, unlike most other centres visited, Maidenbower Square featured national multiple retailers, such as the Co-operative and Boots.

**Figure 4.36 | Unit Composition - Maidenbower Square**



**Figure 4.37 | Maidenbower Square**



4.120 A key feature of Maidenbower Square is that it is adjoined by several community uses, including the

Community Centre, Infant School, Baptist Church, Nursery and the Saxonbrook Medical Centre.

- 4.121 During Nexus' visit, pedestrian footfall was high, and it is likely the centre benefits from communal visits associated with the local community facilities.
- 4.122 Maidenbower Square complex has a distinct built character, including pitched roofed buildings in a cluster, which made it quite dissimilar in appearance to the majority of other neighbourhood parades visited.

### Ifield Parade

- 4.123 Ifield Parade represents a linear retail parade, comprising predominantly of leisure services, including takeaway shops and bookmakers. The parade also features convenience goods retailers, including the Co-Operative, as well several health and beauty salons (retail services). There were no vacant units recorded.
- 4.124 The centre is attractively landscaped, and benefits from public seating, awnings providing weather protection and a community noticeboard.

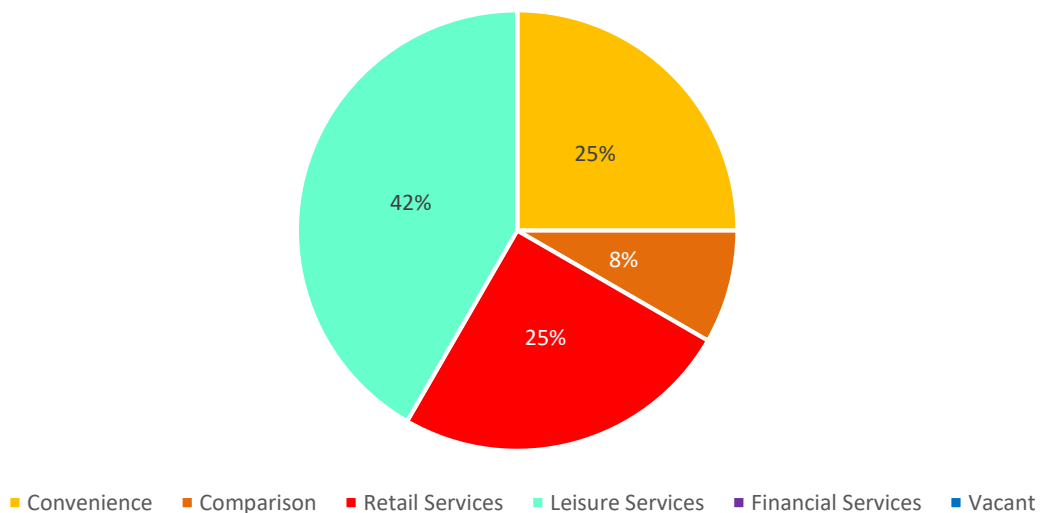
**Figure 4.38 | Community Noticeboards**



4.125 Whilst the parade benefits from a car park to the east, it is predominantly serviced by on-street parking. During Nexus’ site visit, car parking spaces, both on-street and in the car park, were readily available.

4.126 It was noted that the Pelham Buckle Café Private Members Club directly adjoins the Parade but is excluded from the Council’s list of units within the Parade. It is considered that the publically accessible café and Private Members Club are both likely to make a contribution to the Parade by facilitating some longer trips. As such, the building should be included within the Parade boundaries.

**Figure 4.39 | Unit Composition - Ifield Parade**



**Figure 4.40 | Ifield Parade - Public Realm**

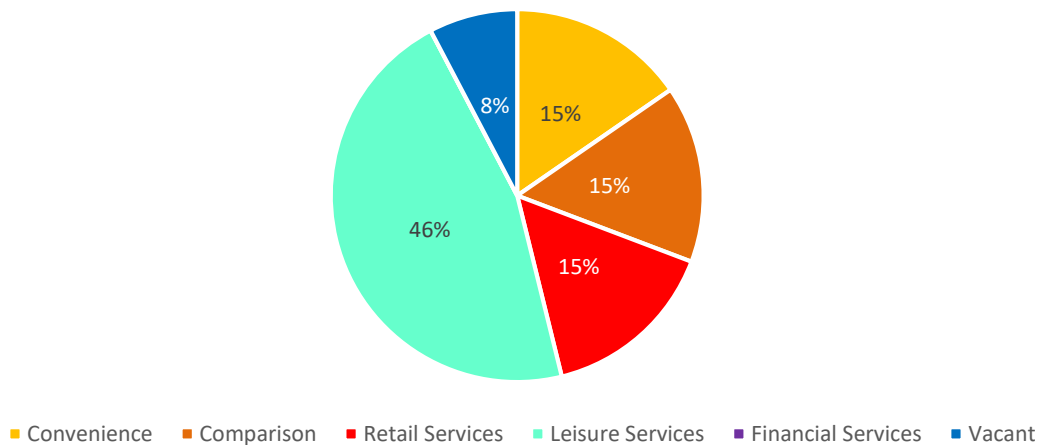


## Gossops Green

4.127 Gossops Green features a mix of retail units and services; however, the prevailing use is leisure services, with a number of takeaway shops and one bookmaker present. At the time of Nexus' visit, the centre had one vacant unit.

4.128 It was noted that the Windmill Pub directly adjoins the centre, fronting onto Gossops Drive. However, this Pub is excluded from the centre's boundary. It is considered that the Pub provides a positive contribution to the centre by facilitating longer trips. As such, it could be included within the parade's boundary.

**Figure 4.41 | Unit Composition – Gossops Green**



**Figure 4.42 | Internal Green Space**



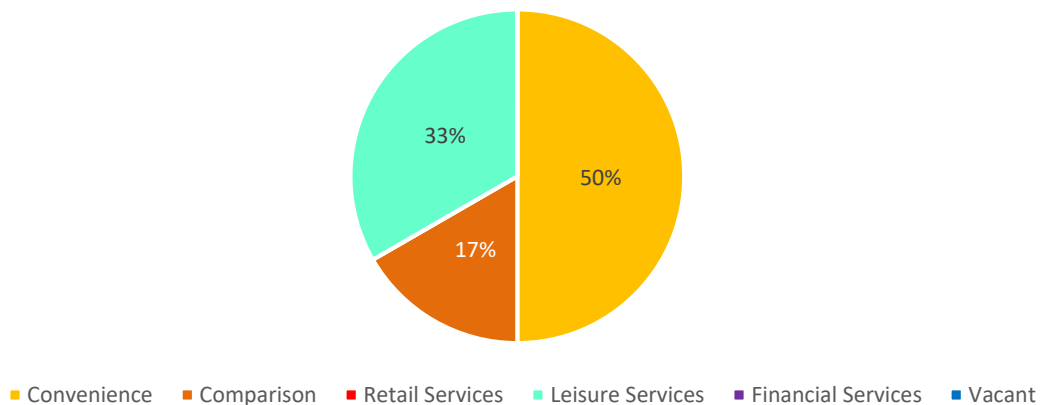


4.129 Whilst the centre is well landscaped, the layout is not particularly legible. The centre benefits from a car park to the south, yet access is not well signposted. The retail units are cloistered around an internal green space, but the complex is inward facing and not particularly visible from external streets. Improved wayfinding may increase the centre’s usage to passing traffic beyond local residents.

Bewbush

4.130 Dorsten Square, Bewbush Centre is comparatively small, and with a limited mix of retail uses and services, and a prevalence of convenience goods, including the Co-operative. The centre is directly adjacent to the Bewbush Community Centre, which includes a local fitness centre, as well as the Bewbush Academy and a nursery, which would likely facilitate linked trips. The environmental quality of centre is somewhat lacking compared to other neighbourhood parades. The centre is visually dominated by the large car parking space, and has relatively limited landscaping and street furniture.

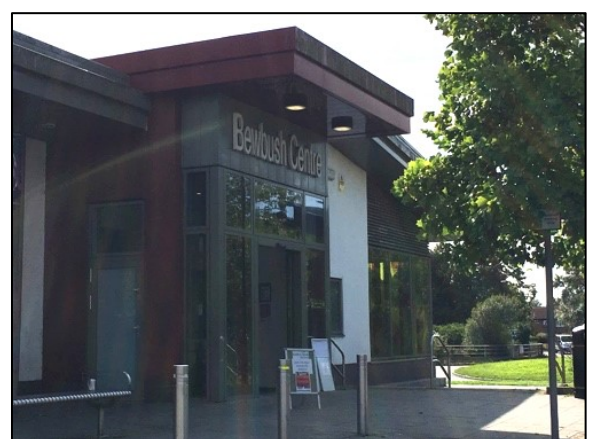
**Figure 4.43 | Unit Composition - Bewbush**



**Figure 4.44 | Bewbush - Public Realm**



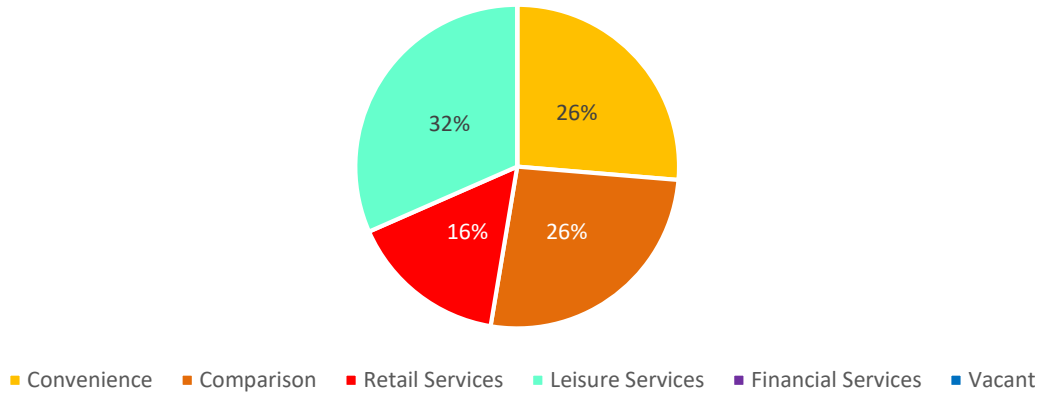
**Figure 4.45 | Bewbush Community Centre**



## Broadfield Barton

- 4.131 Broadfield Barton has a relatively varied mix of comparison and convenience goods retailers, and services. Of the 20 retail units, there were no vacancies. It is one of the few neighbourhood parades that is owned privately rather than by the council. With respect to leisure services, the centre mainly feature takeaway shops, as opposed to dine-in restaurants.
- 4.132 The Imperial Pub is located at the edge of the centre; however, this unit is beyond the centre's current boundaries. It is noted that the Imperial Pub is subject to planning permission for a residential redevelopment, with reprovision of an A4 use at ground floor level.
- 4.133 At the time of our visit, pedestrian footfall was high, indicating the centre is well utilised. The redevelopment of the Imperial Pub for residential uses will likely increase pedestrian footfall.
- 4.134 The centre benefits from good public realm, with street furniture and landscaping. Nexus observed artwork and community notice boards within the parade, which enhanced the visitor experience. There was a good level of parking availability, as well as cycle parking stands.
- 4.135 The NPPF fails to provide any clear guidance to differentiate between what should constitute a 'town', 'district' or 'local' centre (providing only a generic definition of a 'town centre'). Notably, the NPPF glossary also clarifies that: *'references to town centres or centres ... exclude small parades of shops of purely neighbourhood significance.'* As such, small neighbourhood parades differ from local centres.
- 4.136 The MHCLG (formerly DCLG) publication 'Parades to be Proud of' defines local neighbourhood parades as *'typically located in the heart of a residential community, urban and rural, often with around 5-10 units, providing walk in convenience shopping and limited local services.'*
- 4.137 Whilst, at 19 units, Broadfield Barton is slightly larger than some of the smaller neighbourhood parades discussed here, it continues to predominantly serve a local neighbourhood catchment and is not considered to operate at a scale that would justify elevation to local or district centre within the retail hierarchy.

**Figure 4.46 | Unit Composition - Broadfield Barton**



**Figure 4.47 | Broadfield Barton - Public Realm**



**Figure 4.48 | Broadfield Barton - Artwork**



### Downland Drive

- 4.138 Downland Drive comprises of a single convenience goods retailer, being Tesco Express. The Tesco Express operates extended opening hours (6am - 10pm). The shop has good accessibility, being adjacent to bus stops on Downland Drive, and with fully ramped access.
- 4.139 As a standalone retail unit, the facility does not provide any casual shopping opportunities.

**Figure 4.49 | Tesco Express - Downland Drive**



### Dobbins Place

- 4.140 Dobbins Place comprises of a single convenience goods retailer, being Tesco Express. The Tesco Express operates extended opening hours (6am-10pm, Monday to Saturday, and 7am-1pm, Sunday). The shop has good accessibility, being adjacent to bus stops on Downland Drive, and with fully ramped access.
- 4.141 As a standalone retail unit, the facility does not provide any casual shopping opportunities. However, it is understood Dobbins Place functions as a neighbourhood centre for Ifield West.



**Figure 4.50 | Tesco Express – Dobbons Place**

### Conclusions

- 4.142 Overall, the neighbourhood parades are functioning as intended, predominantly providing convenience and comparison goods and leisure and retail services to meet the local resident's day-to-day needs. Across the board, there is a lack of vacancies, demonstrating that units within Crawley's neighbourhood parades are in generally demand. There is a noticeable lack of financial and business services across the neighbourhood parades, which is unfortunate for less able residents, but understandable with financial and business services representing less of a 'day-to-day' need as compared to other retail and service categories.
- 4.143 It was observed that almost all neighbourhood parades benefit from a pub or restaurant, which has in some cases not been included in the Council's defined boundary. As pubs and restaurants can positively contribute to the functionality of these neighbourhood parades, by providing a much-needed social or recreational role, or increasing dwell time within the centre, it is strongly recommended that these uses be included within the defined boundaries.
- 4.144 Most neighbourhood parades demonstrated good environmental quality. However, some parades, such as Bewbush, Pound Hill Parade, Northgate Parade and Peterhouse Parade may benefit from public realm improvements, whilst Gossops Green may benefit from some enhanced wayfinding measures to enhance the currently poor legibility.

## 5.0 Policy Recommendations

### Introduction

- 5.1 This Retail, Commercial Leisure and Town Centre Needs Assessment has been instructed in order to form part of the evidence base to support Crawley Borough Council's emerging Local Plan review.
- 5.2 Specifically, Paragraph 85 of the NPPF indicates that local planning authorities should:
- a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
  - b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
  - c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
  - d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
  - e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
  - f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 5.3 In addition, Paragraph 89 of the NPPF indicates that local planning authorities may set their own local threshold for retail, leisure and office developments outside of town centres for which an impact

assessment would be required.

- 5.4 The Council has therefore appointed Nexus to provide a robust quantitative base for their retail and leisure capacity projections to 2035.
- 5.5 In the preceding Stages, we have considered the health of Crawley Town Centre and neighbourhood parades, where residents currently travel for their retail and leisure needs. The potential for cumulative capacity for additional retail and leisure floorspace in Crawley Borough has also been explored, based on our assessment of existing market shares and population and expenditure growth.
- 5.6 In these circumstances, we go on to consider the appropriateness of the Council's emerging draft local planning policies, with regards to retail, leisure and the Town Centre Neighbourhood.

### **Strategic Policy TC1: Primary Shopping Area**

- 5.7 Draft Policy TC1 does not deviate significantly from the previously adopted Policy EC5 under the Local Plan 2015-2030, which (in conjunction with a 'Town Centre First' policy) is considered to suitably have protected the primarily retail function of the core of Crawley Town Centre, whilst providing for suitable complementary uses.
- 5.8 The policy identifies uses that would be suitable within the Primary Shopping Area, Primary Shopping Frontages and Secondary Shopping Frontages and gives regard to the potential for adverse impacts on the centre's vitality and viability that may result from a proliferation of non-retail uses, without resorting to arbitrary restrictions. Instead, the policy defines the characteristics of vitality and viability to be considered on a case-by-case basis, which can be considered a common sense approach given the evolving manner in which shoppers and other visitors use town centres.
- 5.9 We would suggest that list of areas of consideration within the policy text be expanded to include reference to opening hours, where they can be controlled via Planning Conditions and notwithstanding the potential impacts on residential amenity, which will be a matter of planning balance as currently referenced within the policy wording. This initiative has been incorporated within draft Evening and Night Time Economy Policy, which we consider to be a suitable approach.
- 5.10 We would also recommend that the policy be linked to draft Policy TC4: Active and Engaging Frontages, in order to ensure that any non-retail uses are subject to a further assessment requiring

full compliance with the requirements of Policy TC4. This is to ensure that such uses continue to contribute to the wider vitality and viability of the Primary Shopping Area.

- 5.11 We go on to consider the extent of the defined boundaries, as set out in the reasoned justification to the draft Policy TC1, which currently matches the boundaries within adopted Policy EC5 of the Local Plan 2015-2030.
- 5.12 The NPPF defines a Town Centre as an *'area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres.'*
- 5.13 We agree that the currently adopted Town Centre Boundary should be retained and continues to serve its purpose.
- 5.14 However, we do note the lack of clear pedestrian linkages between Crawley Leisure Park and the rest of the Town Centre, as well as the suggestion from stakeholder discussions that the operators of the Leisure Park were actively discouraging visitors who had parked in the Leisure Park from walking to the Town Centre. Whilst the Leisure Park continues to operate as significant draw and extension to the town centre offer at this time, we would suggest that the Council monitors this relationship and reviews the Leisure Park's function within the Town Centre at the next opportunity to review the Town Centre Boundaries.
- 5.15 Turning to the Primary Shopping Area ('PSA'), it is considered that the currently defined PSA broadly captures the extent of the core Town Centre offer, given that the NPPF glossary defines the PSA as a *'defined area where retail development is concentrated'*.
- 5.16 However, we would suggest extending the PSA boundary (as well as the Secondary Shopping Frontage) to the north west of the centre to incorporate the current Morrisons store. Whilst we acknowledge that Morrisons has announced their intention to close this store, it is trading at the time of this Study. It was found to be a significant draw to the centre through the NEMS Household Survey and should, in our view, be considered part of the PSA. It is a prominent site that remains well connected to the rest of the centre and would continue to be suitable for retail or other uses that anchor the existing facilities along the High Street.

- 5.17 Whilst the Asda Superstore on Pegler Way also acts as a significant draw, it lacks coherent linkages to the rest of the Town Centre. We therefore consider that the Asda Superstore continues to represent an edge-of-centre location in retail terms. Nonetheless, potential improvements to the pedestrian crossing present an opportunity to further develop the store as an anchor for trips along the High Street and facilitate further links to the Town Centre.

## **Strategic Policy TC2: Town Centre Neighbourhood Facilities**

- 5.18 The draft Town Centre Neighbourhood Facilities policy does not have an equivalent policy in the current, adopted Local Plan. Nonetheless, given the recent and planned growth of the residential population, such a policy is considered suitable to meet the needs of current and future Town Centre residents.
- 5.19 We go on to consider the relative need for each of the identified 'Neighbourhood Facilities' in the following Section, at Stage 3 of this Study. In summary, we do not go on to find that any of the needs are so pressing as to require the Council to directly allocate sites for such uses (particularly given the market and occupier-led nature of the majority of these uses). Notwithstanding these findings, the Council should not expressly discourage additional leisure or community facilities, as both can play an active role in contributing to the functionality of a Centre. Likewise, there is a growing need for health care facilities in the Town Centre, which should be actively supported (subject to all other material planning considerations).
- 5.20 In this regard, draft Policy TC2 is appropriate, though we would suggest that the policy includes a requirement for major new residential developments that would contribute to the Town Centre's growing population be required to contribute to the provision of such facilities as appropriate, either through on-site or financial contributions.

## **Strategic Policy TC3: Development Sites within the Town Centre Boundary**

- 5.21 This draft policy provides allocations for development proposals identified as Key Opportunity Sites within the Town Centre.

- 5.22 The majority of sites are located outside of the PSA but within the Town Centre Boundary, and so may seek to provide Main Town Centre Uses in order to comply with the requirements of draft Policy TC4: Active and Engaging Frontages. As such, as referenced within the current draft policy wording, retail uses proposed outside of the PSA will require assessment against the sequential and impact test in accordance with NPPF requirements and subject to the relevant threshold.
- 5.23 The reference to requirements for leisure uses outside of the PSA should be deleted in order to provide consistency with the NPPF, which only requires such assessments for all Main Town Centre Uses other than retail located outside of the Town Centre Boundary.

### **Strategic Policy TC4: Active and Engaging Frontages**

- 5.24 Draft Policy TC4 requires development within the Town Centre to contribute to the ongoing vitality and viability of the centre.
- 5.25 We support with the principle behind this policy, that proposals in the Town Centre should include an active frontage, promote a sense of safety through natural surveillance, generally be publically accessible, and actively attract and increase footfall in order to contribute to the ongoing vitality and viability of the Town Centre. We also agree with the reasoned justification and consider the policy and the criteria listed to be an appropriate response.
- 5.26 As previously referenced, we would suggest that the criteria of this policy be linked to draft Policy TC1 with regards to the requirements for proposals for non-retail uses in the PSA in order to justify that such uses would contribute to the ongoing vitality and viability of the PSA.

### **Strategic Policy TC5: Town Centre First**

- 5.27 This policy corresponds to Policy EC7: Retail and Leisure Development outside the Primary Shopping Area of the adopted Local Plan and provides minor refinements and clarifications that we agree are appropriate. The policy broadly sets out the requirements of the NPPF sequential and retail impact tests.
- 5.28 It is important to point out, as referenced in Stage 1 of the Study, that an identified quantitative retail capacity across the Borough does not necessarily justify the allocation of new retail floorspace in and

- of itself (especially in out-of-centre locations) where they may not also be a qualitative need.
- 5.29 As we have highlighted previously, forecasting as far away as 2035 must be treated with some caution, as there will be economic, political and technological unknowns that will intervene over that period. Moreover, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.
- 5.30 Any consideration of allocations for new retail floorspace should take into account the assessment of the performance, vitality and viability of the qualitative health of a centre to ensure that any identified capacity meets both a quantitative and qualitative need.
- 5.31 Equally, in relation to decision taking, the lack of significant demonstrable quantitative capacity in the immediate future should not necessarily prevent the Council from allowing new applications for retail development in the Town Centre (or other designated centres, subject to all other material considerations. This is particularly relevant where such developments would bolster the draw of such centres and encourage growth in line with Council's aspirations.
- 5.32 In accordance with the NPPF, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by Paragraph 89.
- 5.33 Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the PPG ('Town centres and retail', Paragraph 15):
- scale of proposals relative to town centres;
  - the existing viability and vitality of town centres;
  - cumulative effects of recent developments;
  - whether local town centres are vulnerable;
  - likely effects of development on any town centre strategy; and
  - impact on any other planned investment.
- 5.34 The existing Crawley Local Plan 2015-2030, does not adopt a locally set threshold, and as such the national threshold of 2,500 sq m applies for new retail developments outside of Crawley Town Centre's Primary Shopping Area, or the boundary of any other designated centre across the Borough.
- 5.35 In addition to the guidance within the PPG, in order to robustly justify any proposed local thresholds,

we have considered the overall scale and draw of the centre, the number of available opportunity sites and market patterns to establish what scale of proposal would be likely to impact upon the vitality and viability of the centre.

- 5.36 Where Experian Goad data is available, we have calculated the average size of occupied town centre units across the Town Centre. The average unit size within Crawley Town Centre is 294 sq m and the median is 130 sq m, with units ranging from 10 sq m to 8,430 sq m. Additionally, the average convenience goods commitment measures 280 sq m and the average comparison goods commitment measures 694 sq m (considering a relatively conservative 80% net to gross split of floor areas). Notwithstanding the relative strength of Crawley Borough as a whole, the Town Centre specifically has suffered a fall in market share of overall spending at physical stores over the last decade; this is seen across both convenience goods (from 30.4% to 13.8%) and comparison goods (from 42.6% to 23.1%), as shoppers turned to out of centre retailers.
- 5.37 We are cognisant of the potential for this to continue to cumulatively 'chip away' at the vitality and viability of the centre. In light of the above, it is our view that retail developments falling below the current national threshold of 2,500 sq m have the potential to impact on the health of the Town Centre.
- 5.38 We have also had regard to precedent set through recent appeal decisions. Noting the average size of units identified above, recent decisions are relevant in highlighting cases where proposals for smaller units may result in an adverse impact on a centre. Whilst the significance of levels of impact on town centres should be considered as a matter of fact and degree in each case, it is nonetheless notable that planning appeals in Luton Borough (ref: APP/B0230/A/13/2203864) and the London Borough of Tower Hamlets (APP/E5900/A/14/2217680) have been dismissed by the Secretary of State for retail proposals of just 121 sq m and 261 sq m, respectively.
- 5.39 Whilst we would not necessarily recommend adopting a local threshold as low as the appeal cases referenced, it is indicative of the potential impact of smaller units in out-of-centre retail park locations that can be seen to compete directly with the Town Centre offer. We are also mindful of the potential necessity of larger retail units within Crawley Town Centre (such as the former Morrisons unit) to sub-divide large floorplates in order to provide flexible retail units more suitable to modern retailing.
- 5.40 We therefore conclude that the centres across the Borough are potentially vulnerable to competing



edge-of-centre and out-of-centre retail developments that would jeopardise the vitality and viability of the centres.

- 5.41 As such, we recommend a flat locally set threshold of **500 sq m across the Borough**. This threshold would capture larger convenience retailers, whilst avoiding placing an undue burden on smaller stores and extensions, as well as the majority of comparison goods stores likely to trade from out-of-centre retail parks that would have the potential to generate a cumulative draw.
- 5.42 We would stress that whilst a locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed.
- 5.43 The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

### Strategic Policy EC4: Visitor Accommodation

- 5.44 As we go on to identify in Stage 3 of this Study, we find gaps in Crawley's current provision of hotels and other visitor accommodation that, subject to commercial interest, could be supported in the Town Centre in order to increase the variety of visitor accommodation in the Borough.
- 5.45 With specific regards to proposals for new visitor accommodation in Crawley Town Centre, we therefore consider this draft policy to be appropriate.
- 5.46 It may also be worthwhile the Council considering additional policy to protect and retain existing hotel provision within the Town Centre, subject to relevant considerations including evidence of lack of viability and marketing interest, in order to maintain an adequate supply and range of visitor accommodation over the Plan period.

### Strategic Policy EC5: Night-Time Economy

- 5.47 This draft policy provides support for developments within the Town Centre that would contribute to developing the vitality and viability of the evening and night-time economy, which we consider to be

an appropriate policy objective, given the findings of our health check work in Section 4 of the Study.

- 5.48 In order to fully capitalise on the growing residential population, existing and proposed services in the centre should be open and accessible at convenient times, without jeopardising residents and visitor's sense of safety.
- 5.49 We would suggest that this policy could be developed further to set out that the Council will consider flexible or late-night opening hours as a material consideration in favour of such development, where appropriate to the use proposed and subject to relevant amenity considerations as currently referenced in the draft policy.
- 5.50 The addition of such a policy initiative is a positive approach to an issue currently facing the Town Centre, yet given the necessary restrictions of planning powers, the policy would only relate to new development proposals.
- 5.51 As such, there is the potential to support this approach with parallel initiatives outside of the planning system in order to maximise opportunities for the Town Centre as a visitor destination, including a more unified approach to activity hours. Creating a consistent structure for opening times to serve the family friendly market and a strategy for the evening economy would support this aim, and ensure that the Town Centre is not outmanoeuvred by competing destinations.
- 5.52 Such a strategy could take the form of Supplementary Planning Guidance to guide conditions attached to future Planning Applications or, alternatively, outside of planning controls as an initiative by a suitable Council representative. A Town Centre Manager or even the Town Centre partnership (who are currently progressing the proposed Crawley Town Centre BID) could progress a strategy encouraging a consistency of approach to activity hours across existing facilities.

### **Strategic Policy EC8: Flexible Temporary Art and Creative Uses**

- 5.53 Draft Policy EC8 offers support for 'meanwhile' uses to temporarily occupy vacant units by occupiers seeking to test new business concepts, pop-up stores and event spaces. Such a policy would provide confidence for new and existing small and medium-sized enterprises (SME) investing in Crawley.
- 5.54 We would recommend that the wording be further refined to confirm if the policy applies to both vacant premises and development sites that are subject to construction delays and long lead-in.

- 5.55 Additionally, it would be useful for the policy to clarify if, within the Town Centre and Primary Shopping Area, such temporary uses are required to comply with relevant policies relating to use and frontages (amongst others). We would suggest that this depends on the proposed meanwhile use, as the temporary occupation of a unit would (in most cases) be preferable to a long-term vacancy from a Town Centre vitality and viability perspective. In that regard, we would also suggest expanding the definition of creative uses to include new retail and service concepts that may not fall within traditional Use Class orders, including Sui Generis mixed-uses.
- 5.56 In order to ensure that the Town Centre sufficiently benefits from the policy objectives, we would recommend that the Council develop a database of vacant units and a concurrent strategy to attract such meanwhile users. This could be managed alongside dedicated meanwhile use agencies<sup>45</sup>, local agencies and business groups and furthered by developing relationships with local colleges and higher educational institutions.

## Additional Policy Considerations

- 5.57 Whilst there is a high level of accessibility between Gatwick Airport and the Town Centre, particularly in terms of train and bus connections, Crawley could better position itself as a stopover destination for tourists and travellers. New applications for relevant developments requiring a Travel Plan (such as hotels, and large-scale leisure and recreation facilities) could incorporate initiatives to increase usage of bus and train links. Outside of the planning system, this could be supported through efforts by the Town Centre partnership (or a Town Centre Manager) to facilitate closer working relationships between the airport, and facilities and operators working in the Town Centre.
- 5.58 Suitable development within the Town Centre may also be encouraged through the adoption of a flexible approach to the redevelopment of existing Main Town Centre Uses, in order to enable the centre to better adapt to market requirements and attract Town Centre investment going forward.
- 5.59 Such policies could be supportive of flexible working practices and encourage new opportunities through the amalgamation or sub-division of existing town centre units and workspace (where such development results in little, or marginal, loss of net floorspace) to encourage investment.

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<sup>45</sup> Including the Meanwhile Foundation, Meanwhile Space CIC, and Appear Here (amongst others).

## Stage 3

### Crawley Town Centre as a Neighbourhood

## 6.0 Crawley Town Centre as a Neighbourhood

### Introduction

- 6.1 Crawley Town Centre's residential population has evolved significantly over recent years, now estimated at 831 dwellings.
- 6.2 It is anticipated that housing figures will further increase, to approximately 3,000 dwellings by 2035. If we apply the household size of dwellings within Crawley derived from the 2011 Census, around 2.1 people per household, it is clear that at 6,212 residents, the town centre would justifiably function as a 'neighbourhood' in its own right, and therefore needs careful planning ahead.
- 6.3 This Section of the Study considers whether there are likely to be current or future issues of demand exceeding supply within the Town Centre through a 'gap analysis', with specific reference to local shopping facilities, community facilities, leisure provision and social infrastructure.
- 6.4 This appraisal has been informed by the results of the NEMS Door-to-Door Survey, Experian Goad data, Nexus' site visits, stakeholder engagement, NHS data, WSCC data and various policy documents and publications.
- 6.5 The NEMS Door-to-Door Survey responses should not be considered as strictly determinate of future town centre populations, given the available sample size and the likelihood that the demographics (and habits) of the existing residents within the town centre will fluctuate on the basis of the mix and tenure of housing that comes forward over the Plan period. Nonetheless, the Door-to-Door Survey sample is considered to be broadly indicative of residents' habits and trends over the short-to-medium term.

### Local Shopping Facilities

- 6.6 As outlined in Section 4 above, each of Crawley's neighbourhoods benefit from their own 'Neighbourhood Parade' (in accordance with the New Town development principles), which cater to the day-to-day shopping needs of that neighbourhood's residential population.
- 6.7 With the residential population of Crawley Town Centre growing, it is pertinent to consider the role

of the Town Centre. Whilst the Town Centre currently functions as a major retail centre, catering to residents across Crawley and the wider sub-region, it needs to be determined if the Town Centre can continue to meet the local day-to-day needs of its own resident population.

- 6.8 As identified in Figure 6.1, residents of Crawley Town Centre (Zone 1a) are undertaking the majority of their convenience shopping (85%) within the Town Centre. Similarly, Crawley Town Centre (Zone 1a) residents are undertaking the majority of their comparison shopping (70%) within the Town Centre.
- 6.9 These results indicate that the Town Centre is functioning in a similar manner to Crawley's neighbourhood parades, with the shopping facilities within the centre meeting the majority of local resident's needs, both in terms of convenience and comparison goods.
- 6.10 It is assumed that future residents of Crawley Town Centre will undertake similar shopping patterns to existing residents, with the majority of shopping to be undertaken within the Town Centre.
- 6.11 It is not considered there is any additional need for local shopping facilities within the Town Centre to specifically meet the needs of the growing town centre population, given the quantitative capacity identified in Section 2.

**Figure 6.1 | Town Centre Residents Spending Patterns**

Zone 1a Residents	Convenience Goods		Comparison Goods	
Town Centre Spending	£2.5m	84.9%	£3.2m	70.3%
Out of Centre Spending	£0.4m	13.8%	£0.9m	19.3%
Out of Borough Spending	£0.0m	1.3%	£0.5m	10.4%
<b>Total Spending</b>	<b>£3.0m</b>	<b>100.0%</b>	<b>£4.6m</b>	<b>100.0%</b>

Source: Appendix D & E

## Community Facilities

- 6.12 It is also relevant to consider whether the Town Centre can meet the growing residential population's needs in terms of community facilities, such as places of worship, community halls, and flexible event and indoor spaces.

### Community Halls and Event Spaces

- 6.13 Crawley Borough Council operates 15 community centres across the neighbourhoods of Crawley. These community centres are available to the public for various purposes, including events, meetings and parties. However, none of the community centres are located within the Town Centre.
- 6.14 The Door-to-Door Survey indicated that more than half of respondents (53%) were satisfied with the current provision of community hall facilities.
- 6.15 Importantly, 20% of respondents answered that they did not know about Crawley's community halls. Furthermore, under a separate question, approximately 60% of respondents advised that they had never visited a community hall in Crawley.
- 6.16 On this basis, it is not considered that there is a pressing need to provide additional community facilities within the Town Centre.
- 6.17 However, event spaces, public halls and facilities can positively contribute to dwell time in town centres, as well as facilitating social interaction and a sense of community. As such, proposals for such facilities should not be actively discouraged and should be considered on their own merits.

### Places of Worship

- 6.18 When considering existing facilities within the boundaries of Town Centre, the following places of worship have been identified:
1. St John the Baptist's Church
  2. St Francis and St Anthony's Church
  3. Crawley Assemblies of God
  4. Crawley Gurdwara
  5. Gulzar-e-Habib
- 6.19 There are a number of other places of worship that are located in close proximity to the Town Centre but outside of the defined boundaries, including at Northgate, Southgate, West Green, Ifield and Pound Hill.



- 6.20 The Door-to-Door Survey revealed that current residents of Crawley Town Centre predominantly do not visit Places of Worship, with 66% of respondents stating that “never visited” or “don’t do this activity”.
- 6.21 Crawley Council offers a publicly available “Guide to Developing Community Facilities and Places of Worship” to assist groups facilitate or develop a place of worship or cultural facility within the Borough. This is a positive initiative, which provides an appropriate level of support to cultural and religious groups.

## Leisure Provision

- 6.22 It is also relevant to consider whether the Town Centre can meet the growing residential population’s needs in terms of leisure facilities, such as cinemas, restaurants, bars indoor health and fitness facilities, and tourist accommodation.
- 6.23 As highlighted in Section 2, residents of the Town Centre (Zone 1a) are less likely to take part in almost all leisure activities surveyed (including indoor health & fitness, cinema, restaurants, bars, ten-pin bowling and cultural facilities) as compared to residents of the Study Area. The only anomaly to this trend was bingo, for which 8% of Town Centre residents participated, compared with 5% across the wider Study Area.
- 6.24 Interestingly, 36% of Town Centre Residents reported that they did not participate in any leisure activities, compared with 9% across the Study Area. It is unclear why Town Centre residents were so much less likely to participate in leisure activities; however, this could be due to the smaller sample size of the Door-to-Door Survey as a result of the smaller available resident population.
- 6.25 It should be noted that Crawley Town Centre successfully provides for its resident population in almost all instances for leisure facilities. When asked about the most popular leisure destinations for each leisure activity (health & fitness, cinema, restaurants, bars, bowling, bingo and cultural facilities) residents of Zone 1a selected Town Centre locations for all but two categories. In particular, Brighton was chosen as the most popular location for restaurants and cultural facilities.
- 6.26 When asked what Town Centre residents would like to see more of in Crawley, 31% responded that there was “nothing” or they “did not know”. The next highest response was play spaces and park

facilities (14%).

- 6.27 Overall, given the limited proportion of town centre residents who partake in leisure activities, and considering that those who do predominantly choose leisure activities located within the Town Centre, it is not felt that there is a pressing need for additional facilities within the Town Centre to specifically address a need from town centre residents. Given the availability of leisure facilities within and surrounding the Town Centre, and that the majority of town centre residents did not specifically request any specific additional leisure facilities, this is likely to remain the position for the foreseeable future.
- 6.28 Notwithstanding, this does not mean that leisure facilities should be discouraged. In particular, leisure facilities such as restaurants, for which a gap has been identified, as well as additional play space, may positively contribute to visitor’s experiences of the Town Centre, as well as increasing dwell time.

### Hotels

- 6.29 There are currently 7 accommodation providers operating within Crawley Town Centre. This includes three hotels, one serviced apartment and three self-catering holiday homes as detailed in Figure 6.2 below.

**Figure 6.2: Accommodation in Crawley Town Centre**

Accommodation	Type	Category	No. of Rooms	Star Rating
Arora Hotel	Hotel	Branded	432	4 star
Broadwalk Apartment	Self-catering unit	Unbranded	1	3 star
Ramada Crawley	Hotel	Branded	79	3 star
Shortstay UK Serviced Apartments	Serviced Apartment	Branded	1	Unrated
Travelodge	Hotel	Branded	110	3 star
Beautiful Apartment Crawley	Self-catering unit	Unbranded	1	Unrated
Victoria House	Self-catering unit	Unbranded	1	Unrated

- 6.30 The Town Centre's accommodation stock (by establishment type) is limited in variety, with 50% of options serviced apartments and the remaining 50% hotels. No inns, motels or B&Bs were identified within the Town Centre. Combined, the accommodation in Crawley Town Centre comprises of 625 bedrooms, of which, all but 4 rooms are in hotels. As such, more than 99% of the Town Centre's accommodation by bedroom supply comprises of hotel rooms.
- 6.31 It is noted that the majority of accommodation with Crawley Town Centre is branded, and owned by a corporate chain company. The Town Centre includes three well-known hotel providers – Travelodge, Arora and Ramada. The serviced apartments are not branded; however, it is not uncommon for serviced apartments to operate under independent ownership, as this provides a unique offer for consumers.
- 6.32 It is also evident that there is a supply of self-catering units and private rooms available in Crawley Town Centre via the Airbnb platform. From our review, there are approximately 8 apartments available to rent, and 6 private rooms to rent via Airbnb. These accommodation options provide an alternative to more traditional hotel operators.
- 6.33 When considering the star rating of accommodation provided within the Town Centre, it is acknowledged that all providers are either ungraded, three star or four star. The Town Centre has no two star or budget accommodation. There is also no five star accommodation available in the Town Centre.
- 6.34 This trend is fairly consistent across the Borough, with no five-star hotels and no two star hotels identified within Crawley.
- 6.35 Overall, it is apparent that the accommodation stock within Crawley Town Centre, and across the wider Borough is fairly uniform, with limited variety in terms of establishment type or star rating.
- 6.36 As part of the Household Telephone Survey, residents across the Study Area were asked to outline recommendations for accommodation in Crawley. It can be challenging to identify tourism trends from residents of a local area, as it is uncommon for residents to require hotels in their local area. As such, the question was worded as *"if you were to recommend one local hotel or bed & breakfast to a visitor to the Crawley area, which one would you recommend?"*
- 6.37 When considering the results from residents of Zone 1 (being Crawley residents), the top 5 most

highly recommended accommodation providers across the Study Area were:

1. Travelodge, Pegler Way (24.8%)
2. Arora Hotel, Crawley (20.6%)
3. Crowne Plaza, Langley Drive, Crawley (11.9%)
4. Holiday Inn Express, London Gatwick (10.6%)
5. Premier Inn, London Gatwick Airport – Manor Royal (6.9%)

6.38 When considering the results from residents of the full Study Area, the top 5 most commonly recommended hotels were the same as above, but in a different order:

1. Premier Inn London Gatwick Airport - Manor Royal, Crawley (11.1%)
2. Arora Hotel, Crawley (10.1%)
3. Crowne Plaza London, Langley Drive, Crawley (9.5%)
4. Travelodge, Pegler Way (8.2%)
5. Holiday Inn Express London Gatwick, Crawley (6.9%)

6.39 When asked if Crawley had enough accommodation, only 5% of respondents said “no”. However, it is worth noting that more than half (59%) of respondents answered that they did not know.

6.40 When asked if Crawley needed to improve local visitor accommodation, the results were more varied. Approximately 21% of respondents said no improvement was required, whilst 14% said improvement was required. The remaining 65% of respondents said they did not know. Those residents who responded “yes” to the question regarding local visitor accommodation improvements were then asked what improvements could be made to Crawley's visitor accommodation. The most popular response was “better quality hotels” (34%), followed by “better quality B&Bs” (21%). Additionally, “More hotels”, “more B&Bs” and “more affordable accommodation” were popular responses to this question at 15%, 11% and 10% respectively.

6.41 On this basis, it is considered that Crawley Town Centre may benefit from additional accommodation providers, particularly if those accommodation providers meet the existing gap in the market. Specifically, our gap analysis identifies a distinct lack of 5 star accommodation, as well as a lack of affordable or budget accommodation options. Notwithstanding, we would note that any application should be considered on its own merits.

## Social Infrastructure

6.42 It is also important to consider whether existing social infrastructure can meet the needs of the Town Centre's growing residential population, particularly in terms of education, medical, and waste and recycling facilities.

### Education

6.43 There are currently 26 primary schools and 7 secondary schools within Crawley Borough. Of the primary schools, all except for two schools are located within the statutory walking distance<sup>46</sup> of Crawley Town Centre boundaries. All 7 secondary schools are located within the statutory walking distance of the Town Centre boundaries.

6.44 The West Sussex County Council (WSSC) Planning School Places (2019) provides key data for each school within West Sussex, regarding net capacity, and the number of pupils on roll at each school. WSSC determines that when the number of pupils on the roll exceeds 95% of the school's net capacity, the School is 'at capacity'.

6.45 The WSSC Planning School Places 2019 states the following with respect to Primary School Places:

*"Demand for primary school places has plateaued in Crawley after a period of rapid growth from 2012 and demand is forecast neither to grow significantly nor fall away."*

6.46 With respect to Secondary School Places, it notes "the increase in demand for primary places in recent years is likely to have a corresponding impact on the demand for secondary places from 2018, with a potential shortfall in places from 2020."

6.47 The majority of the Primary Schools within walking distance of the Town Centre were identified as being at capacity<sup>47</sup> at the time of West Sussex County Council's (WSSC) Planning School Places assessment (2019). There were few notable exceptions:

- Milton Mount Primary School (91%)
- The Gatwick School (67%)

<sup>46</sup> Department for Education (2014) – Home to School Travel and Transport Guidance (2 miles for ages 5 to 8, 3 miles for ages 8 to 16)

<sup>47</sup> WSSC considers any school exceeding 95% is at capacity

- Gossops Green Primary School (90%)
- Mill Primary School (69%)
- Our Lady Queen of Heaven (86%)
- Waterfield Primary School (77%)
- Broadfield Primary Academy (87%)
- Seymour Primary School (80%)
- Southgate Primary School (85%)

6.48 In terms of Secondary Schools, only two of the seven are at capacity (Hazelwick School and St Wilfred’s Catholic School). The remaining five secondary schools within Crawley Borough are considered to have capacity for new students, with two schools, The Gatwick School and Thomas Bennet Community College recording considerable capacity at circa 60%.

6.49 On this basis, it is apparent that there is some existing primary and considerable secondary school capacity within the Borough. However, it is important to note that these schools are providing places to Crawley Borough as a whole, and not just the Town Centre’s growing population. Equally, our assessment has been based on review of the total capacity of each school across all school year; this differs somewhat from the Council’s own Infrastructure Plan, which considers capacity at first year of entry. This highlights a potential future secondary school capacity shortfall from 2020 due to the increased demand in primary school places in recent years starting to transition to secondary schools in the Borough. However, funding for a new secondary free school to serve Crawley Borough was approved by the Secretary of State in 2017 and the Council is working with WSCC and the Department for Education to identify an appropriate site, which may be beyond Crawley’s boundaries given land constraints within the Borough.

6.50 When considering new developments, WSCC uses the following standard methodology for calculating likely student numbers:

**Table 6.3: WSCC Pupil Place Formula**

School Category	Children
Primary (ages 4 to 11)	25 per 100 dwellings
Secondary (ages 11 to 16)	18 per 100 dwellings

Source: WSCC S106: Planning Obligations (July 2019)

6.51 On this basis, the 3,000 homes anticipated within Crawley Town Centre would facilitate need for 750 primary pupil places and 540 secondary pupil places.

- 6.52 However, this is a purely mathematical equation, and does not account for the specific demographics of the new residential population of the Town Centre. In particular, it is noted that a large proportion of the new or future residential units coming forward in the Town Centre, particularly those consented via office to residential prior approval comprise of studio or 1 bedroom units. Our review of the town centre office to residential prior approval schemes allowed since 2015, 70% comprised of studio or 1 bedroom units, with the remaining 29% being 2 bedroom units, and 1% being family units (3+ bedrooms).
- 6.53 Furthermore, from the Door-to-Door Survey, it is evident that the majority of residents of the Town Centre (65%) are not parent or guardian to school-aged children, indicating the demographic of the town centre is perhaps less oriented towards family housing, and therefore, the WSCC pupil place formula is not directly applicable in this instance.
- 6.54 Notwithstanding, moving forward, where office to residential prior approval opportunities dwindle, there will be an increase in applications assessed against Planning Policy, which would likely result in a higher proportion of family units, which would have knock-on effects for neighbourhood requirements. On this basis, it is considered that there is no immediate need for a new primary or secondary school to directly address the needs of the Town Centre's increasing residential population. However, the Council should continue to work with WSCC to monitor school-aged populations moving forward.

### Health Care

- 6.55 There are several medical facilities located within Crawley's defined Town Centre, including the Saxonbrook Medical Surgery, Broadway Dental Care, Family Dental Care and Crawley Hospital.

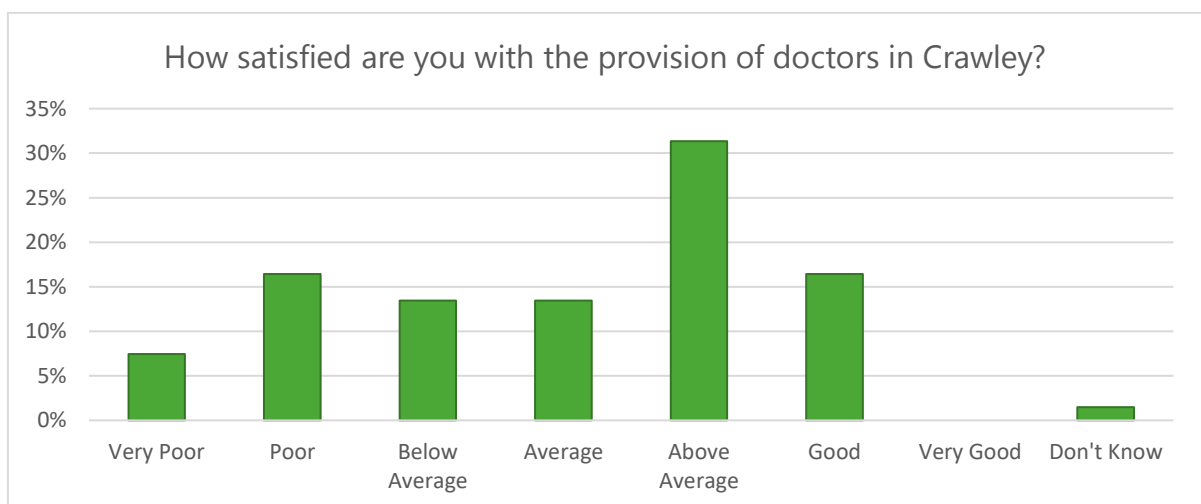
### *GP Facilities*

- 6.56 Saxonbrook Medical Surgery is the only GP practice within the Town Centre. The Saxon Medical Surgery has two practices, being the Northgate branch and the Maidenbower branch. The Northgate branch is located within the Town Centre on Haslett Avenue West.
- 6.57 NHS data is only available for Saxonbrook Medical Surgery as a whole (and not for the two individual branches). However, based on the information available, it is understood that the Saxonbrook Medical



- Surgery is currently over-subscribed. Recent capacity figures<sup>48</sup> indicate the practice is oversubscribed by more than 4,500 patients<sup>49</sup>, indicating there could already be a shortage of doctors at this facility.
- 6.58 Notwithstanding the above, there are a number of other GP practices across the borough. The NEMS Door-to-Door Survey revealed that respondents from the Town Centre were much more likely to be registered to a GP in Maidenbower (49%) or Langley Green (27%), as compared with a GP in the Town Centre (2%).
- 6.59 It is unclear if the over-subscription of the Saxonbrook Medical Surgery is the reason why existing town centre residents are not registered to a GP within the Town Centre, or if there are other factors affecting this decision. When asked where residents previously lived, the responses vary, with the highest proportion of new residents (who agreed to answer the question) from Croydon (10%), Brixton (9%), and Wallington (9%), which would not explain the relative lack of local registrations.
- 6.60 Interestingly, when asked how satisfied town centre residents were with the provision of Doctors Surgeries in Crawley Town Centre (Figure 6.4), almost half of respondents considered existing facilities were above average or good. However, 37% of respondents considered existing provision to be below average, poor or very poor.

**Figure 6.4: Satisfaction with existing doctors facilities in Crawley Town Centre**



- 6.61 Our review of NHS data indicates that several GP practices within Crawley Borough, including Langley Corner, Leacroft Medical Practice and Southgate Surgery have limited capacity for additional patients.

<sup>48</sup> NHS Choices (2019) Saxonbrook Medical Centre <https://www.nhs.uk/Services/GP/Overview/DefaultView.aspx?id=39687>

<sup>49</sup> NHS (2015) GPs per 1,000 Patients <https://www.nhs.uk/Scorecard/Pages/IndicatorFacts.aspx?MetricId=100063>

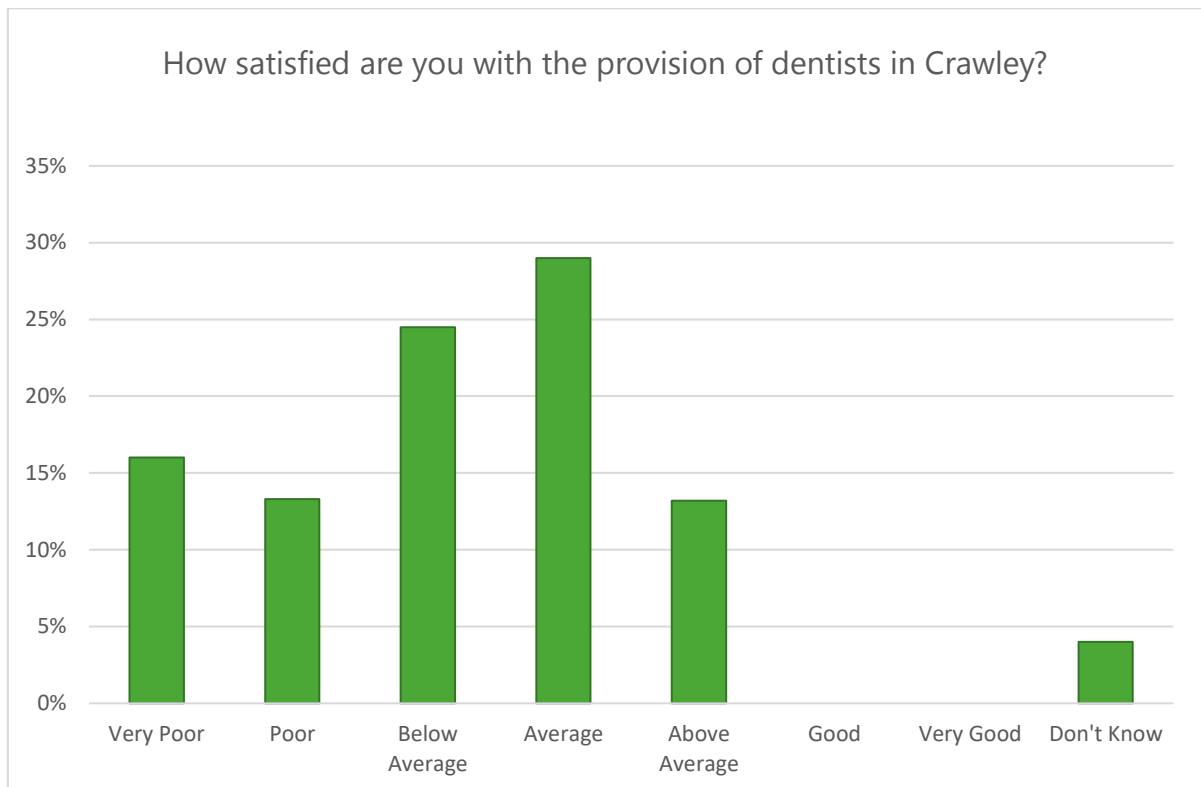
However, it is important to note that these facilities will be catering to residents of these neighbourhoods, as well as any overspill from the Town Centre.

- 6.62 Considering the existing over-subscription of the Town Centre's only GP practice, and relatively high levels (38%) of resident dissatisfaction with the existing facilities, and given the anticipated growth of the Town Centre's residential population, it would be suitable for the Council to investigate avenues for further GP facilities within the Town Centre.

### *Dental Services*

- 6.63 There are two dental practices operating within the defined Town Centre, being Broadway Dental Care and Boulevard Dental Care. Both are private practices, and do not offer NHS dental services. Unlike with GP practices, the NHS does not provide patient capacity information for dental facilities, so it is unclear whether or not Broadway Dental Care and Boulevard Dental Care are over-subscribed.
- 6.64 The closest dental practice offering NHS services is the Northgate Dental Clinic, which is opposite the Leisure Park (just outside of the defined Town Centre boundary). There are several other dental practices offering NHS services in the vicinity of the Town Centre, including Family Dental Care, Pembroke Dental Practice and Crabtree Road Dental Clinic.
- 6.65 Crawley Hospital also provides Special Care Dental Services, which are available to patients with specific health and social care issues.
- 6.66 When asked how satisfied town centre residents were with the provision of dental practices in Crawley Town Centre (Figure 6.5), the majority of respondents were dissatisfied with existing facilities. No respondents considered the current provision of dental practices in Crawley to be good or very good.
- 6.67 The survey results indicate there is likely to be demand for additional dental services within the Town Centre. However, dental practices are market driven. Specifically, there needs to be a dentist who chooses to operate in the location. As such, providing more dental facilities within the Town Centre may be beyond the Council's control; nonetheless, this demand should be taken into consideration should the Council receive an application for a new dental practice over the plan period.

### **Figure 6.5: Dentists in Crawley**



### *Hospital Services*

- 6.68 Crawley Hospital is located within the defined boundaries of Crawley Town Centre and offers a wide range of services including but not limited to neurology, paediatrics, general surgery, cardiology, walk-in services and urgent care. Crawley Hospital does not provide accident and emergency (A&E) services. The closest A&E provider is the East Surrey Hospital in Redhill.
- 6.69 The Langley Green Hospital is also located in close proximity (1.2 miles) of Crawley Town Centre, and provides a range of mental health services.
- 6.70 Stakeholder engagement with the Council and findings from Crawley Clinical Commission Group in Crawley's Infrastructure Plan has indicated that Crawley Hospital is under-utilised, and there is existing capacity and space to provide additional services onsite. It is also understood that the hospital itself requires significant maintenance work, and there may be more efficient uses of the site.
- 6.71 The Council may wish to consider the possibility of working with the hospital's healthcare providers, including the NHS Crawley Clinical Commissioning Group and Surrey and Sussex Healthcare NHS Trust to improve the utilisation of Crawley Hospital.

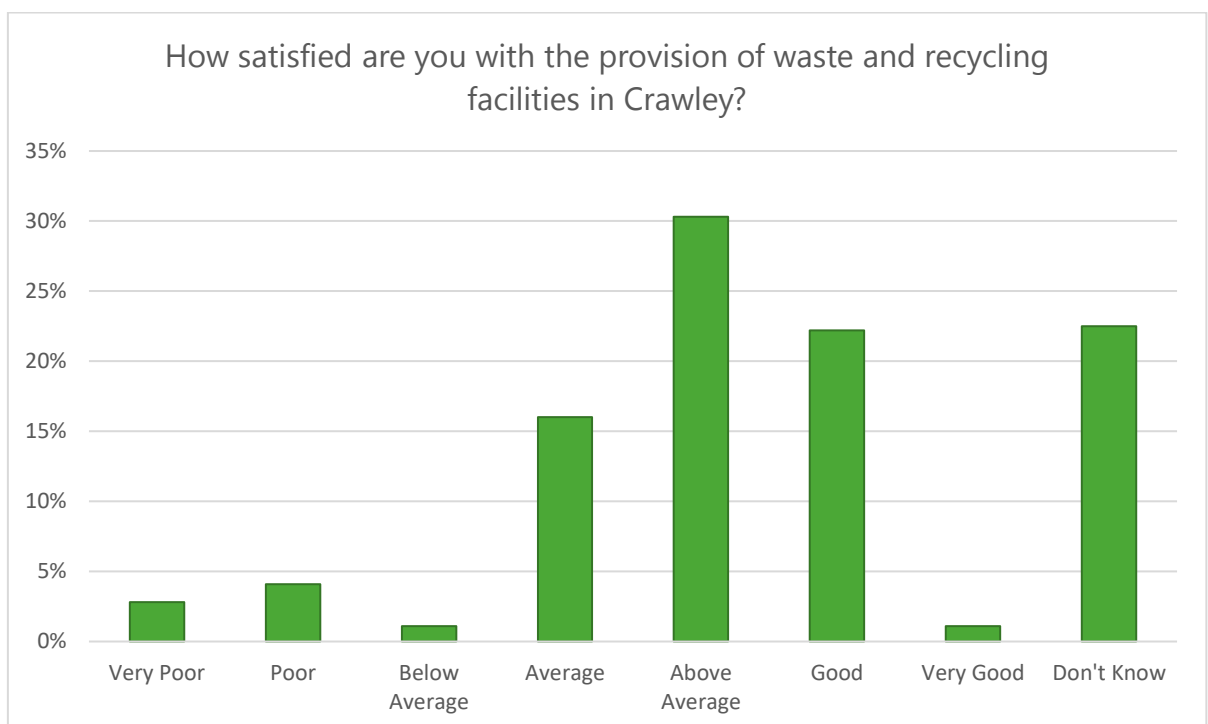
6.72 In particular, given the growing need for doctors, and the current levels of dissatisfaction with existing dental services, there may be scope for these services to be offered from the hospital.

Waste & Recycling Points

6.73 Crawley’s recycling goes to the WSCC Household Waste Recycling Site and Transfer Station which is located at County Oak, just north of the Town Centre. The Station has a capacity of 45,000 tonnes per annum and a catchment area of 5 miles. Crawley’s general household waste goes to a Mechanical Biological Treatment Plant at Brookhurst Wood, Warnham.

6.74 It is understood WSCC seeks to reduce waste over the period to 2031. However, WSCC has also calculated that an additional waste management capacity of 0.67 million tonnes per annum is required by 2031. Crawley is one of seven councils in West Sussex County, and therefore, only a portion of this 0.67 million tonnes is attributed to the Borough.

**Figure 46.6: Waste Facilities in Crawley**



6.75 WSCC has identified additional facilities for transfer, recycling, and treatment of commercial and industrial waste and construction and demolition waste. The strategic waste sites, which are allocated in the Waste Local Plan, are allocated in accordance with this spatial strategy.

- 6.76 No additional waste sites are identified or required in Crawley itself.
- 6.77 It is not considered that the anticipated growth of Crawley Town Centre's population is significant enough to warrant additional waste and recycling facilities.
- 6.78 Only 8% of the respondents of the Door-to-Door Survey identified as being dissatisfied with Crawley's existing waste and recycling facilities (Figure 6.6).
- 6.79 Importantly, a considerable proportion of respondents answered that they did not know about Crawley's waste and recycling facilities. As such, the council may wish to consider engaging in information sharing initiatives to improve resident understanding of the availability and services provided by Crawley's waste and recycling facilities.

## Conclusions

- 6.80 Overall, it is considered that Crawley Town Centre functions well within the neighbourhood principle, insofar as the Town Centre provides local residents with good access to shops, services, leisure activities and community facilities.
- 6.81 Crawley Town Centre's resident population is growing rapidly, and the centre's offer will be required to continue to meet local demand. Our analysis of existing local shopping facilities, leisure provision and community facilities has not identified any pressing gaps within the existing Town Centre that would be required purely as a result of the growing Town Centre population.
- 6.82 Notwithstanding these findings, the Council should not expressly discourage additional leisure or community facilities, as both can play an active role in contributing to the functionality of a Centre.
- 6.83 With regards to social infrastructure, it acknowledged that there is a growing need for health care facilities in the Town Centre, including GP and dental services. The Council could consider methods of improving efficiencies at the existing Crawley Hospital to help address this gap in provision, and improve resident satisfaction.
- 6.84 We would also encourage the Council to raise awareness of the existing waste and recycling facilities, as the findings of Nexus' study indicates that existing residents are unaware of existing services.

6.85 Finally, our analysis indicates there is existing capacity for school places across the Borough to meet the growing Town Centre population, which would suggest that there is no immediate need for new educational facilities to meet the needs of this specific populace. However, the Council is encouraged to continue working with WSCC with respect to education facilities, as the WSCC provides up-to-date monitoring of existing capacity and available school places across the Borough.

## Glossary of Terms

<b>Bulky goods:</b>	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display. <i>Source: Planning Portal</i>
<b>Capacity:</b>	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. <i>Source: Planning Portal</i>
<b>Comparison Goods:</b>	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.). <i>Source: Planning Portal</i>
<b>Convenience Goods:</b>	Everyday essential items, such as food. <i>Source: Planning Portal</i>
<b>Edge-of-Centre:</b>	For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. <i>Source: NPPF</i>
<b>Expenditure per Capita:</b>	The amount of money spent on retail goods per person in each Zone across the Study Area.
<b>Expenditure:</b>	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
<b>Experian Goad:</b>	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.
<b>Experian (MMG3):</b>	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
<b>Financial &amp; Business Services:</b>	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. <i>Source: Experian Goad</i>
<b>Floorplate:</b>	Defined as the physical rentable area on one whole floor; sometimes



called the footprint.

- Goad Plans:** A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations.  
*Source: Experian*
- Independent Retailers:** Retailers with less than 10 outlets/ stores.  
*Source: Experian*
- Leisure Services:** An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.  
*Source: Experian Goad*
- Main Town Centre Uses:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).  
*Source: NPPF*
- Market Share:** The proportion of residents that visit a particular retail destination, derived from Household Survey results.
- National Multiple:** Defined as retailers with ten or more stores/ outlets.  
*Source: Experian*
- Prime Unit:** 'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property.  
*Source: Colliers*
- Primary shopping area:** Defined area where retail development is concentrated.  
*Source: NPPF*
- Retail Floorspace:** Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).  
*Source: Planning Portal*
- Retail Impact:** The potential effects of proposed retail development upon existing shops.  
*Source: Planning Portal*

- Retail Services:** An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.  
*Source: Experian Goad*
- Sequential Approach:** A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites.  
*Source: Planning Portal*
- Sales Density:** Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers.
- Special Forms of Trading:** Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.  
*Source: Experian*
- Study Area:** The geographical area where the Household Telephone Survey and Door-to-Door Survey is carried out, based on postal sectors that make up the 12 Zones that cover Crawley Borough and its surrounding hinterland.
- Trade draw:** The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas.  
*Source: PPG Paragraph: 018 Reference ID: 2b-018-20190722*
- Turnover:** Amount of sales per unit area of retail floorspace  
*Source: Planning Portal*
- Town Centre:** Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.  
*Source: NPPF*

**Nexus Planning  
London**

Holmes House  
4 Pear Place  
London  
SE1 8BT

T: 0207 261 4240  
[nexusplanning.co.uk](http://nexusplanning.co.uk)

