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prd

CROYDON FUTURE OF DESTINATION RETAIL

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Croydon Future of Destination Retail
Final report

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WE MADE THAT

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EXECUTIVE SUMMARY

The revival and development of the North End area of Croydon Town Centre will be delivered in a period of unprecedented change. The impacts of the current pandemic, Brexit, and the post-Covid recession, combined with the major challenges facing our societies in the 21st Century — tackling climate change, addressing public health issues, and reducing inequalities — alongside Croydon's specific urban, social, environmental and economic challenges, all serve to only elevate the importance of a renewed and aspirational vision for the North End area.

There are strong opportunities for positive changes, and Croydon has the right ingredients for these. With clear outcomes, objectives and processes in place, the area can be remodelled to become a pioneering inclusive, resilient, and unique destination for all, which revives central Croydon's bold and visionary heritage, with innovation and biodiversity at its heart. This vision will build on the area's existing assets and legacy of innovation and enterprise, to become a highly productive quarter that helps tackle climate change, improves public health and wellbeing, celebrates diversity, and fosters social and community cohesion through all stages and parts of its development.

The current development and spatial framework for the redevelopment of the North End area, as set out in the Opportunity Area Planning Framework (OAPF), needs to be re-invented to be bolder and more ambitious. Whilst most of the OAPF principles still endure, it is clear that some of them are outdated in the light of recent trends, political priorities and broader societal challenges. In particular, the 'Retail Core' chapter does not address how recent trends and changes in retail - as well as wider challenges impacting town centres, local economies, and residents - will be tackled.

Analysis of evidence and trends presented in this report strongly suggest an over-provision of retail floorspace, and highlight that 'retail-led' should no longer be the descriptor for the revival and development of the North End area. In order to be resilient and successful, the North End area will have to strike a careful balance between meeting local needs, whilst attracting and serving new and expanded communities, workers and visitors. Accommodating a more diverse and denser mix of uses will help to ensure its future resilience, whilst also accommodating sustainable and inclusive growth. In addition, lasting economic and social value will be generated whilst avoiding dependency on a single sector. Retail will still have a role to play in this configuration, but more as 'service' and as part of a blend of activities rather than as the core function.

In addition, it is apparent that profit-driven regeneration alone will not resolve the major challenges faced by our societies in the 21st Century — tackling climate change, addressing public health needs, and reducing inequality. These cannot be reduced to 'externalities' that may or may not result from a functioning market system. In the context of these challenges, there is a need for innovative approaches to growth and development, with a focus on public value: how commercial and financial considerations can be balanced against social and environmental considerations to build a stronger case for investment and deliver a resilient and inclusive town centre.

The North End area can play a pivotal role in addressing environmental, social and economic challenges, and stimulate growth, vitality, and cultural life of the town centre. It can set the standards for climate change action, economic resilience, equality, as well as increasing health and wellbeing for Croydon, London and beyond.

Looking beyond retail and building on Croydon's strengths and aspirations to create a fair, diverse, inclusive, and resilient town centre.

Croydon Town Centre, and the North End area, is not functioning well as a retail centre. Even before the pandemic and the announcement that the Whitgift Centre has been removed from the Croydon Partnership's development pipeline, the town centre faced several challenges, including changes in consumer demands, economic and market restructuring, inherited car-focused infrastructure and dwindling local authority resources, resulting in increased vacancies and impacts on attractiveness and investments.

Now is a critical moment to radically rethink the North End area's role and function. Croydon Town Centre has the right ingredients. It is one of London's biggest 'growth centres' and is attracting considerable investment, which is progressively changing the face of the town centre. Following a strong public and civic agenda, the town centre is increasingly transforming its public realm, and delivering new streets, public, civic, and green spaces through its planning framework and coordinated programming. Croydon also has a rich cultural and urban heritage and the Council puts a strong emphasis on cultural growth, creative production and cultural participation. It also has ambitions to become a global centre for higher education, knowledge transfer, and lifelong learning, tapping into the increasingly important knowledge economy. The town centre is home to diverse, young and dynamic communities; an array of dynamic grassroots organisations and larger institutions; innovative businesses; a considerable reservoir of social capital — together, these are all key assets for the town centre that should be celebrated and built upon.

There are challenges, however. Realities of climate change, the public health crisis, economic and market restructuring, high levels of pollution, economic, social, and racial inequalities, and more, won't yield to linear solutions. These problems are complex, systemic, interconnected, and urgent, requiring insights from multiple perspectives and integrated responses.

The approach presented in this document proposes situating the framework for the revival and development of the North End area at the intersection of Croydon's existing strengths - social, economic, urban, cultural - and its most pressing societal and economic challenges. By aligning the policy framework and future interventions around 'Grand challenges' such as climate change, public health, and inequalities, this approach will serve as a 'North Star' to marshal public and private resources to meet these challenges over the medium and long term.

The vision and principles for the future of the North End area need to be rooted in broad societal challenges - the 'Grand challenges' - in order to bring coherence and focus to public and private investment, as well as to set out a clear direction of travel that is shared and understood by all.

To address both the 'Grand' and Croydon-specific challenges, the revival and growth of the North End area should be steered through a strong framework and value model focussing upon public value — a balance of social, economic, environmental benefit — alongside commercial reality. With clear outcomes, objectives and processes in place, it is trusted that Croydon can liberate property and public space to work in a different and more impactful way, supporting the creation of a fair, diverse, inclusive and resilient town centre.

The public sector at large has a role to play by making use of its influence and local levers — policy, planning, procurement, public realm management — to set a clear objectives, key development and spatial principles, and a roadmap for the delivery of an inclusive, sustainable and innovative town centre for all.

Responding to the 'Grand challenges'

These three multi-faceted, interrelated and broad societal 'Grand challenges' are considered to be the three overarching issues that any change, initiative, or development should seek to address.

TACKLING CLIMATE CHANGE
Climate change is among the most pressing issues of our time. Croydon declared a climate emergency in 2019, and the council is targeting carbon neutrality by 2030. It should be ensured that the transition to zero carbon happens, and happens in a fair way, providing good quality jobs, improving wellbeing, and reducing inequality.

ADDRESSING PUBLIC HEALTH NEEDS
Today's health challenges include an ageing population; unhealthy lifestyles; potential for global pandemics; and the health impacts of climate change and pollution. The revival and growth of the North End area has a pivotal role to play in improving the population's health and wellbeing, and reducing health inequalities. The places where individuals live, work and play, the connections they have with others, and the extent to which they feel able to influence the decisions that affect them — all have a significant impact on heath and wellbeing.

DELIVER EQUITY, DIVERSITY & SOCIAL JUSTICE
The advancement of equality is a matter of human rights and a condition of social justice and inclusion. It should not be seen in isolation. A large number of individuals and communities experience the impacts of continued barriers realted to social and economic class, and lack of access to the wealth of mainstream society. A socially-integrated town centre would be healthier, fairer and safer, and would provide opportunities for generating local cohesion and wealth.

A suggested renewed vision for the North End area

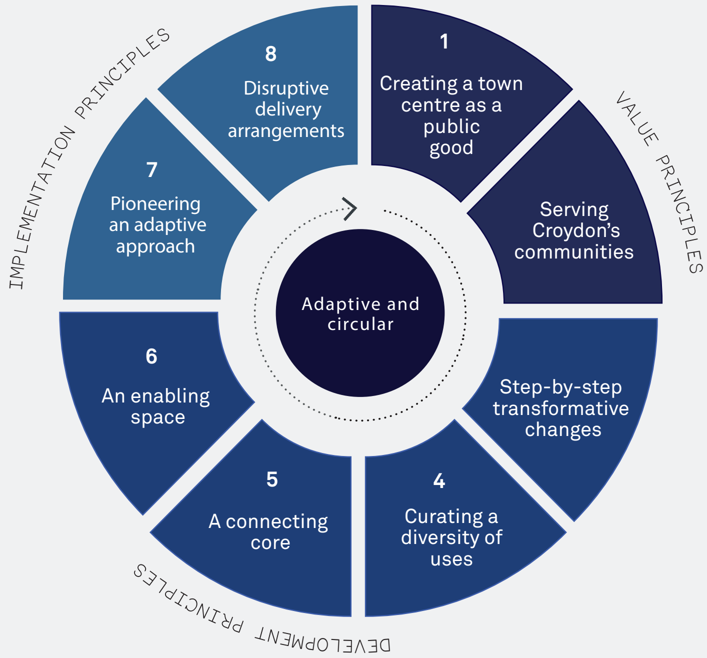
The changing climate, as well as social and economic imperatives, provide a key opportunity to remodel the North End area, making the critical shift from grey to green. Croydon was bold and innovative in the 1960's, but produced a concrete landscape and car-dominated centre that is today proving detrimental for multiple reasons. Croydon Town Centre — and the North End area — can be trailblazers again, by setting out a resilient and restorative vision for their future. This can provide benefits, including:

— Climate resilience;
— Health savings and wellbeing;
— Equity, diversity, and social justice.

The North End area will become a pioneering inclusive, resilient, and unique destination for all, which revives central Croydon's bold and visionary heritage, with innovation and biodiversity at its heart. It will be a highly productive quarter that helps tackle climate change, improves public health and wellbeing, celebrates diversity and fosters social and community cohesion through all stages and parts of its development.

The revival of the North End area promises to breathe new life into Central Croydon, and it should be ensured that its development and phases capture economic, social, and environmental value, and that any initiative is beneficial for the environment and for existing and future residents, workers, businesses and local organisations.

Suggested emerging principles for the North End area's revival



The suggested principles lay out the foundations for the creation of a resilient, inclusive and adaptive place for people, which supports them through changing patterns of social and economic behaviours as well as improves their health, social cohesion and access to initiatives.

1. Creating a town centre as a public good
The North End area, as a public environment, will be established as a key asset for Croydon's residents and businesses. Local residents will be involved in decisions and the production of space. The public sector and communities will be long-term stewards of the place.

2. Serving Croydon's communities
The needs and ambitions of Croydon's diverse population will be supported. This will be embedded in accessible places, spaces and uses that value, welcome and celebrate other groups, cater to a variety of tastes, and provide opportunities for all.

3. Step-by-step transformative changes
Growth will be 'unblocked' through acceptance of a phased and flexible approach to development, allowing for testing and innovation. Re-use and adaptation of existing buildings will be encouraged and early interventions in the public realm will be key in activating and transforming the area.

4. Curating a diversity of uses
The North End area will be a resilient, lively, and diverse 24h hour town centre and residential neighbourhood, catering for its diverse population as attracting visitors, workers, businesses and innovation.

5. North End area as a connecting core
The North End will be a highly connected area with a great sense of place building on Croydon's strong and vibrant heritage. Improved public realm and pedestrian and cycling routes will act a social spaces, with green and blue infrastructures at their heart.

6. North End area as an enabling place
The North End area will be an innovative and inclusive centre where ideas, as well as creative and autonomous thinking, are nurtured through collaboration with communities, civic actors, businesses and higher education institutions. Circular economy principles will be embedded through collaboration across supply chains and between businesses, research and community organisations

7. Pioneering an adaptive approach
The North End area's revival and development will be controlled and steered through a reflexive and adapting mechanism that can keep pace with change on-the-ground and at a macro-economic level.

8. Disruptive delivery arrangements
The revival of the North End area will require new ways of organising to support delivery and future governance, including temporary use of empty spaces, acquisition of land and buildings, use of locally-led delivery bodies and alternative governance models.

Suggested overarching vision

Located at the heart of the Metropolitan Centre, the North End area has a key role to play in the transformation of Croydon Town Centre, through the provision of new uses, spaces and initiatives, which will have to balance the needs of existing and future residents, celebrate the 'old and the new', fulfil the dual function of being both a thriving metropolitan centre and of an increasingly residential area.

The North End area will build on its history as an education, creative and commercial hub, to be an attractive visitor destination with a vibrant public and cultural offer. The anticipated growth in Croydon will be sustainable, futureproofed and guided by good growth principles – it will follow innovative design-led approaches, and set an example for similar edge city conditions.

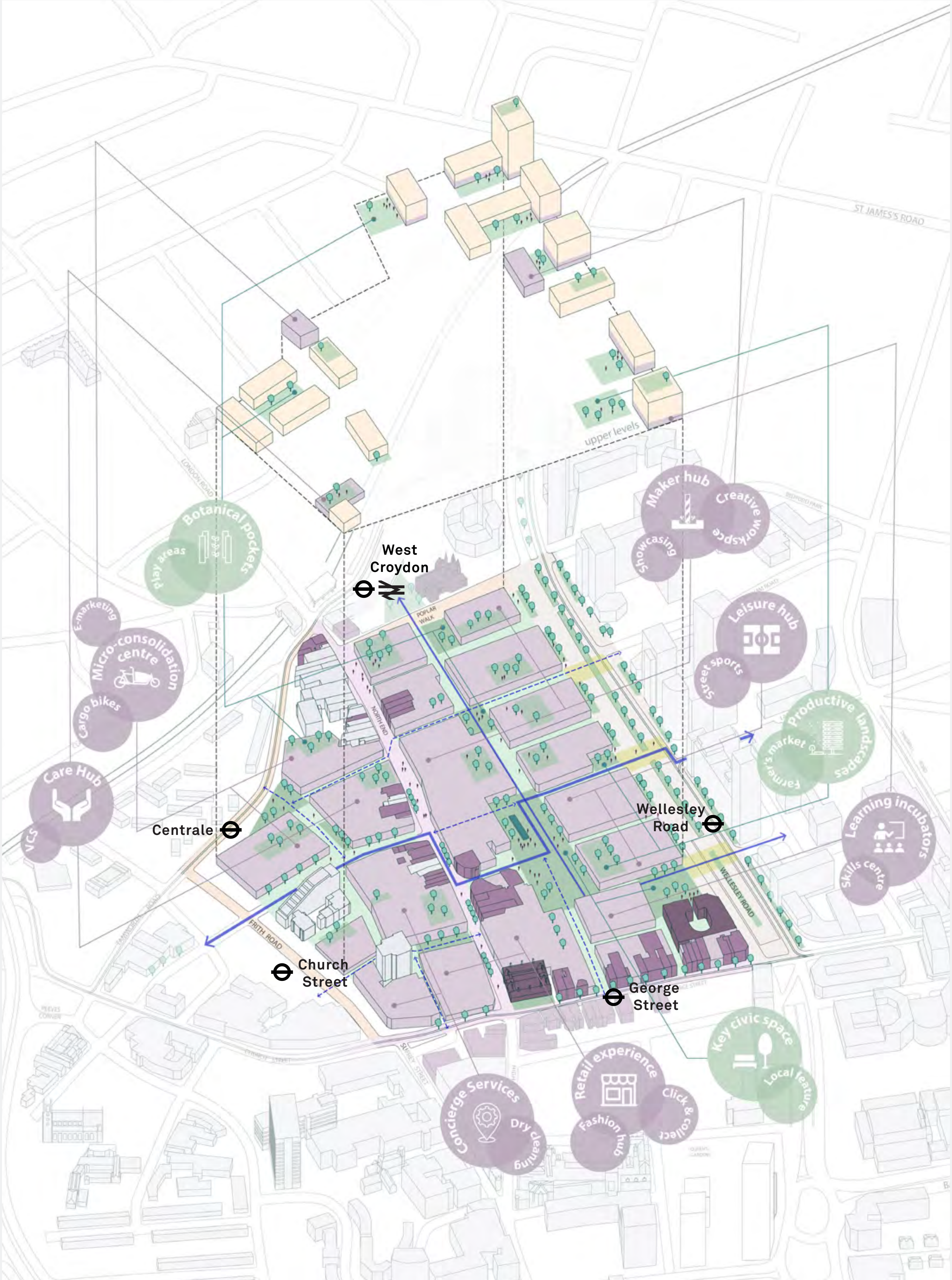
The North End area will be a place to live, work, visit and innovate in, that builds on a strong community cohesion, and delivers against climate emergency, public health and equality agendas. Its revival, growth, and development will be accompanied by, and derive from, a strong public vision around who and what the town centre is for. The North End area will enhance quality of life and build community cohesion through an increased focus on public realm, biodiversity and open spaces. It will include an accessible and exemplary physical network of streets, public and civic spaces and facilities, celebrate heritage and a unique local character, with great green, blue and digital infrastructures and sustainable transport embedded throughout.

It will incorporate a diverse and dense mix of uses which cater for the needs of a diverse resident population, workers and visitors. 'Mixed-use' will characterise the area as a whole, but also individual streets and blocks, horizontally and vertically. The area will host public amenities at different levels, including on podiums and rooftops. It will make room for uses and spaces that are less about 'chores' or necessary visits and more about choices around social activity and participation.

Biodiversity will be at the heart of the North End area with productive and restorative landscapes provided along circulation routes, within new public spaces and pocket parks, and at uppers levels.

KEY

- Main new public access east/west route (24 hr)
- New and improved secondary routes
- Potential new routes
- Key open space
- Publicly accessible rooftops & residential amenity space
- Public space improvements - inner paths
- Potential pedestrian crossings/subways improvements
- New local feature
- Indicative plot sub-division / ground floor podium
- Indicative residential buildings on upper floors
- Frith Road and Poplar Walk improvements
- High Street enhancements
- Wellesley Road improvements
- Listed buildings
- Locally listed buildings



upper levels
Botanical pockets
Play areas
E-marketing
Micro-consolidation centre
Cargo bikes
Care Hub
VCS
Maker hub
Creative workspace
Showcasing
Leisure hub
Street sports
Productive landscapes
Farmer's market
Learning incubators
Skills centre
Key civic space
Local feature
Retail experience
Click & collect
Fashion hub
Concierge Services
Dry cleaning
West Croydon
Centrale
Wellesley Road
Church Street
George Street
ST JAMES'S ROAD
NORTH END
POPLAR WALK
WELLESLEY ROAD
FRITH ROAD

Suggested spatial principles

It is envisaged that the North End area will be transformed into an attractive, robust, accessible and inclusive public destination. The five overarching spatial principles for delivering the vision are as follows:

Connectivity
Permeability, accessibility and movements - including vertical movements - will be improved by introducing new 24 hour routes, cycling, pedestrian, smart and digital infrastructures, as well as a joined up servicing and delivery access strategy. Reducing severance caused by Wellesley Road will be key.

Public realm
The public realm will be conceived and used as a social and civic space, providing opportunities and amenity for public life at different levels, as well as a new anchor public space and a network of pocket parks and squares. Green and blue infrastructures will be provided to create a productive and biodiverse landscape.

Mix of uses
The area will provide
people 24 hour a day
of retail, leisure, com
workspace uses, as w
productive landscape
economy uses and in
cater for diverse dem
needs.

uses that attract
and include a mix
munity, cultural and
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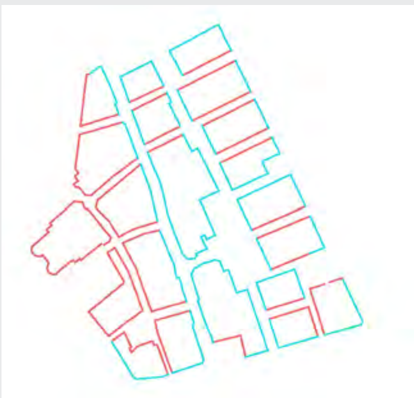
Frontages
Ground floor uses will be considered as an extension of the public realm to ensure they complement and support existing and forthcoming facilities and activities, create active frontages and attract people 24 hours a day. Design and quality will be exemplary and enhance the setting of the Central Croydon Conservation Area.



Phasing
The phasing of the North End's area transformation will be based around a long-term, holistic plan and vision. Early interventions in the public realm, including removing parts of the Whitgift Centre's roof, along with precursors and interim uses will be important to unlocking the revival of the area and improving perceptions.

How do we get there?

Developing an adaptive and circular approach, and a new value model...

To deliver on the vision, it is necessary to think differently. In particular, sustainability should no longer be considered as solely an environmental issue, but instead as one anchored in new economies to create better places that underpin growth in social equity. The essential value of the natural environment, and its role in underpinning economic prosperity, health, and wellbeing, should be acknowledged.

It is thought that circular economies can provide a more dynamic and resilient models that support new values around sustainability and social welfare. With this in mind, the approach for the revival and development of the North End area should seek to create a healthier, and more productive and socially cohesive urban environment with green infrastructures and biodiversity at the core of any change, development and initiative.

The development model should drive and incentivise long-term returns and support the provision of local services and utilities to create environmental and financial resilience. LB Croydon and partners should take a pro-active approach in exploring the growing priority of land value capture and using a new value model to better benefit from land value increases. This will ensure that future developments capture economic, social, and environmental value and are beneficial for the environment, as well for existing and future residents, workers, businesses, and local organisations.

Having a sensible and informed strategic plan for land use, allowing for biodiversity and ecosystems as underpinning aims of this, will result in maximum benefits for all and more environmental and social equality. This will have to be complemented by other measures, including wellbeing and health, social integration, social capital and wealth.

...building on long-lasting objectives, clear outcomes and focusing on public value.

In delivery and planning terms, the approach will need to be adaptable at every level. A coherent and cohesive phased strategy for the area's revival will allow for greater flexibility and fluidity, as well as for a more organic and resilient transformation.

The strategy should build on long-lasting objectives and clear outcomes, and be capable of accommodating changes to overcome issues of stasis and decline that have characterised the town centre in recent years. Planning policy and associated guidance will need to be flexible and responsive. Focusing resources on the revival and growth process rather than on developing a highly specific end state for the North End area should be prioritised.

Early interventions in the public realm will be crucial. Merely beginning work on site would overcome some forms of uncertainty, demonstrate that change is occurring and set the tone for the future.

New and short-term projects will need to be different, probably more human in scale and certainly more aware of the social and environment impacts they deliver. Establishing a strategy for interim and precursor uses, as well as a different approach to public assets, property/portfolio management and space governance will be key in securing the delivery of transformative projects in the short and medium term.

The study has identified a series of precedents and best practice examples, which help in understanding how innovative and new models of 'destination' could lead to better efficiencies and outcomes. These are presented in this report.

0. INTRODUCTION

0. INTRODUCTION

Context and purpose

We Made That and PRD were commissioned by the London Borough of Croydon to carry out a research study on the future of 'destination retail' and - more specifically - to interrogate the future of the North End area, currently designated as the 'Retail Core' in the Croydon Opportunity Area Planning Framework (OAPF, 2013) and Croydon Local Plan (2018).

Designated as an Opportunity Area, Central Croydon offers particular potential for positive change, and has the capacity to accommodate new homes, businesses, community facilities, and a renewed cultural offer. Croydon is transforming itself as a town with a network of high quality civic spaces, including an entirely new plaza at Ruskin Square, a new world class public realm on College Green, a new Town Hall Square on Katherine Street, a public garden at Queen's Gardens and winter garden at 101 George Street, a new forecourt at West Croydon station and a range of pocket parks, such as 'College Square'.

The North End area has been one of the top retail and commercial centres in London and enjoys some of the best transport connections in the UK. However, there has been a limited amount of coordinated investment in the area since the early 1990's and much of the retail area is tired. It is experiencing similar, if not greater, challenges as those seen on a global scale and, as such, needs to be future-proofed to ensure a vibrant and resilient economy and town centre. This has been exacerbated by the COVID-19 crisis, something that will further impact the retail industry in the short-term, as well as affect how people live, work and play.

In early 2020, it was confirmed that the site comprising the Whitgift Centre and Allders which had consent to be re-developed as a large and comprehensive retail-led mixed-use development incorporating the existing Centrale shopping centre, had been removed from The Croydon Partnership's development pipeline. Discussions are in their infancy with the stakeholders involved regarding a revised consent that seeks to amend the existing consent, or a fresh consent that introduce a new phased development approach and a new blend of uses. Whilst the future is still uncertain, there is a clear opportunity for the North End area to become a successful centre once again, complementing other parts of the town centre and delivering good growth, as well as environmental, social, cultural and economic benefits to the town centre, the borough and its residents.

The study aims to establish a detailed evidence base interrogating the current retail landscape in Croydon Town Centre and the Purley Way, as well as to identify emerging and future trends, and their impact on the resilience, vitality and design of retail destinations and town centres. The study also considers other related town centre uses such as hospitality, entertainment, arts and culture, community and evening uses, among others. It also considers how knowledge economies and circular principles can be developed and embedded within the town centre.

Future developments and initiatives within the town centre, the wider Croydon Opportunity Area and the Purley Way will need to respond to the challenges posed by global shifts in the retail sector – this includes the nature of the wider retail market and the macroeconomic environment. Interim, precursor, medium and long term plans must holistically respond to these fluxes. This, coupled with the current COVID-19 pandemic, will no doubt lead to further shifts in the way people use and navigate town centre and other retail-led destinations.

This report presents the findings from the baseline research as well as the suggested emerging responses for the revival of the North End area. The analysis is intended to be utilised to shape the relevant chapters and policies in the Croydon Local Plan and establish a vision and key principles, as well as clear objectives and priorities for the revival, development and growth of the area.

Methodology

First, the report sets out the evolutionary context of retail-led destinations with a focus on Croydon town centre, the North End area and the Purley Way. It establishes Croydon's current retail context and characteristics. This has primarily comprised of a desktop exercise and is based on existing evidence, strategic and policy documents, as well as comparative analysis to better situate Croydon's retail within the wider London context.

The second part of the study focuses on emerging and future trends within the retail market and retail-led destinations, including wider factors which impact upon the future of those uses. It identifies the key drivers of change affecting the retail sector and town centres, and helps in understanding what the future could look like for the North End area.

Finally, suggested emerging principles and spatial responses have been developed to inform the future of the North End area. Case studies and precedents have been key in informing these and have helped understanding of how innovative and new models of 'destination' could lead to better outcomes.

The emerging principles are intended to:

— Stimulate thoughts about what could be possible for the North End area and consider alternative options to current proposal, in regards to mix of uses in particular;
— Help evaluate opportunities to deliver 'early wins' / immediate recovery actions / medium and long-term opportunities;
— Lay out the foundations for a town centre that is resilient, vibrant and inclusive as well as generate a broad range of desirable outcomes from community wealth and environmental health to inclusive wellbeing and equity, in a reliable and lasting way, and;
— Guide the development of planning policies and future redevelopment approaches.

Overall, the research has made clear that enabling the long-term prosperity and sustainability of Croydon town centre and the North End area will, in part, be dependent upon taking a new approach to tackling the difficulties that have become evident in recent town centre performance, and responding to today's key environmental, social and societal, cultural, and economical challenges.

The revival and growth of the North End area presents key opportunities for the public sector at-large to innovate and take a pro-active approach to changes in the context of climate emergency, economic uncertainty, increased inequalities, and public health crisis.

The principles have been developed with a broader view of economic success in mind and although future commercial viability is important, addressing the challenges related to climate emergency, social, racial and economic inequalities as well as public health and residents' wellbeing, are seen as equally important. These should all be rooted in local character and set out a vision that enables the development of a well-designed, resilient, sustainable and high-quality centre.

Finally, the study highlights the growing priority of land value capture and of using a new value models to better benefit from land value increases, to ensure that future developments capture economic, social and environmental value, as well as are beneficial for the environment, existing and future residents, workers, businesses and local organisations.

© Croydon Arts Store

1. CONTEXT

1.1.1 EVOLUTION OF RETAIL-LED DESTINATIONS

Evolution in retail locations

The existing location, operation, offer and design of retail-led development in the UK and at any one time represents a response to a multitude of factors including consumer demand and mobility, the prevailing public policy context, structural change within retailing, and changing operator requirements[1&2]. Over the last century, the location, characteristics and vitality of retailing have varied significantly as these factors have changed.

Development of town centre shopping precincts
The history of planned retail-led destinations in the UK began shortly after the end of WWII where cities experienced demand for retail growth and expansion, which was credited to the post-war economic boom[3]. By the late 1950's, planned retail-led developments began to be developed in European town centres, with a surge in development of town centre retail precincts in the 1970's assisted predominantly through funding by local councils. Precinct developments were intended to provide functionality for shoppers and retailers alike, and were based on formalised street patterns and 1950's/ 1960's architecture[4]. They were characterised by small units built to accommodate an overflow of high street retail through the construction of indoor malls and pedestrianised high streets and public spaces. Shopping centres were typically designed so that consumer space and retail were accommodated in a single building block.

Emergence of out-of-town retail locations
The development of shopping centres and retail-led destinations created suburban modes of consumptions and travelling that were highly influential in the development of out-of-town retail destinations. The 1980's saw a change in UK government policy, which moved away from retail development in town centres and lifted restrictions that had previously been in place in regard to out-of-town retail developments[5]. Supermarkets, megastores and out-of-town retail parks emerged as the first significant competitors to town centres. Property development and private sector involvement has been essential in the success of these initiatives. The model also developed as a result of economic and social changes including the decline of British manufacturing and rise of modern car-oriented shopping patterns. Over the period 1994-2004, the market share of retail spending of the out-of-town sector UK-wide rose from 23.9% to 29.8%, whilst the High Street sector declined from 50.1% to 47.5%[6]. The growth of out-of-centre shopping was followed by out-of-centre leisure facilities. Out-of centre cinemas emerged strongly in the 1990's, replacing many town centre facilities. Other forms of leisure facility, e.g. bowling alleys, health and fitness centres, and restaurants have followed. Such facilities were also being integrated into retail parks, hence providing a more diverse range of attractions for visitors[7].

Of the period, Peter Jones (John Lewis' former director) argues that, in the UK, '*the town centre has lost its monopoly of comparison shopping, and many local authorities were clearly worried about the possible long term decline of traditional central shopping areas*' (Jones, 1989)

'Town centre first' & reinvestment in inner-city retail
By the mid 1990's, no further applications for out-of-town centre sites were considered, which was attributed to a further change in government policy restricting development for out-of-town shopping centres[8] and stipulating a stance towards inner-city retail development. The introduction of the sequential test into planning policy ('Town centre

1 Evolution in city centre retailing (1974-2003), S Brown 2005
2 High street performance and evolution: a brief guide to the evidence N Wrigley, D Lambiri 2014
3 Transformations of retailing in Europe after 1945 , Jessen & Langer, 2012
4 Retailing in the United Kingdom, Guy, 2012
5 Rethinking town centre futures, Oughton & al, 2003
6 Verdict, 2005
7 Vitality and viability: challenge to the town centre, Schiller, 1999
8 Rethinking town centre futures, Oughton & al, 2003

first'), requiring the most central locations to be taken up as a priority over more peripheral locations — alongside the fact that 'need' does not have to be proven for town centre schemes — has helped to concentrate new retail developments within town centres[1]. In conjunction with the policy shift towards enhancement of the vitality and viability of established centres, local authorities and town centre partnerships have sought to improve the competitiveness of many town centres through initiatives such as the appointment of town centre managers, the emergence of town centre Business Improvement Districts (BIDs), pedestrianisation and traffic-calming schemes, as well as increased car parking provision. Alongside these initiatives, there has also been an increased focus on exploitation of retail development as a catalyst for regeneration in order to enhance the vitality and viability of established centres — in turn, increasing their ability to compete with out-of-centre retail offers. It is noticeable that over this period, retail provision has been concentrated within established centres or out-of-centre locations, which are relatively high within the retail hierarchy. At the same time, as a result of this polarisation of retail provision, there has been a decline in retail provision within traditional local centres[2].

2008 crisis & considerations beyond retail
The global economic crisis of 2008 has raised increasing concerns about the economic health and vitality of town centres and the retail sector. Town centres provided highly visible evidence of the scale of the economic downturn, and the crash in consumer confidence was followed by an immediate and abrupt increase in vacancies in UK town centres. Significantly, the shockwave also exposed and reinforced longer-term underlying forces of change, which had been reconfiguring UK town centres and retail destinations, but which had been somewhat masked during the growth years of the 1990's and 2000's[3].

Of particular importance amongst those structural forces, were:
— The progressive rise of online shopping;
— The long-term and cumulative impacts of competition from out-of-town retail destinations; and
— The progressive and highly complex shifts in consumer behaviour and cultures of consumption towards what has been referred to as 'experience culture' .

As retail vacancy levels rose sharply and gaps appeared in centres across the UK, the state of town centres became a focus of public and political attention. The impact was sufficiently severe for the term 'crisis' to be used in connection with town centres and the retail sector. In the academic and commercial reports generated in response to the recognition that town centres and retail planning needed to adapt to changing circumstances, there has been an increased awareness that retail alone is not the problem, and that town centres need to be about more than simply retailing[4&5&6].

Despite this shared awareness that town centres and high streets should be understood beyond their retail elements, as a social and civic spaces with a range of functions, ways of measuring and assessing town centre performance still tend to focus overwhelmingly on retail functions. Most of the approaches are still based on a view that a competitive town centre is one that competes with other prime shopping locations for retail trade.

1 Planning for retail development, Guy 2003
2 Planning for retail development: A critical view of the British experience, Guy, 2006

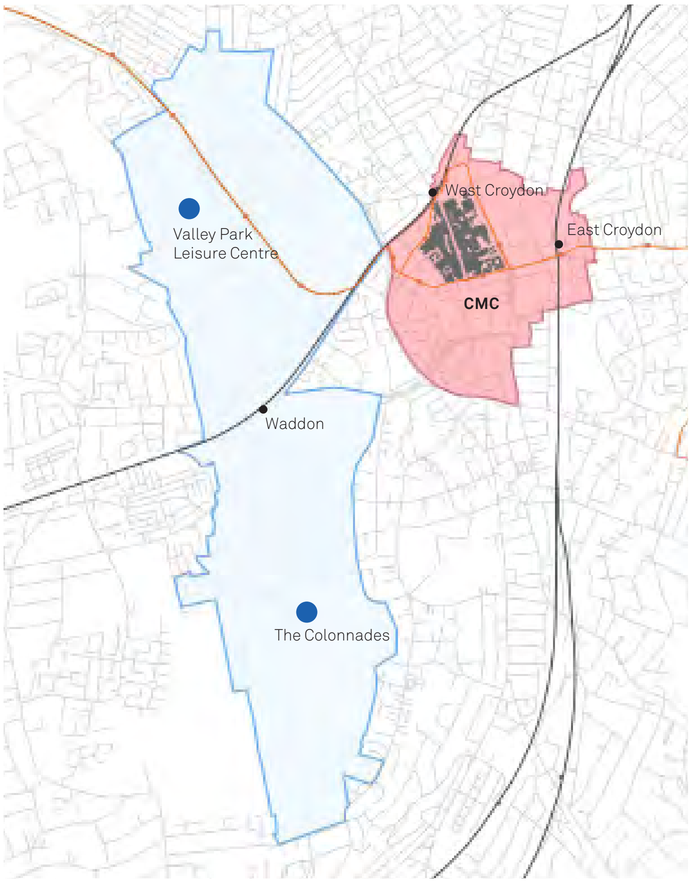
3 Resilience, fragility, and adaptation: new evidence on the performance of UK high streets during global economic crisis and its policy implications, Wrigley & Dolega, 2011
4 Beyond Retail, the great british high street, Task force 2013
5 Life beyond retail: A new and better vision for town centre, Dobson 2011
6 The Portas Review, An independent review into the future of our high streetS, Mary Portas, 2011

1.1.2 CROYDON RETAIL DESTINATIONS

North End area & Purley Way

Croydon's built history is one of short bursts of rapid growth, interspersed by periods of change or decline, echoed in shifts in built style and character. Croydon expanded in the Middle Ages as a market town and a centre for charcoal production, leather tanning and brewing. Later nineteenth century railway building facilitated Croydon's growth as a commuter town for London. By the early 20th Century, Croydon was an important industrial area, known for car manufacturing, metal working and Croydon Airport. In the 1950's, Croydon was identified as a new 'out-of-centre' office location as part of the decentralisation of office space from central London. Between 1963 and 1973, 20% of offices and 30% of jobs moved out of Central London to Croydon. These actions saw the development of 550,000 sqm of new commercial space; a range of civic buildings; two large retail centres; several multi-storey car parks; and a series of large infrastructure projects including Wellesley Road, Croydon Flyover and Roman Way.

Croydon has experienced decline over the last 30 years due to a decrease in demand for office space, and the success of landmark office locations such as Canary Wharf. At the same time, investment in the public realm has been limited, and despite investment in the new retail facilities in the 1990s, the town centre struggled and a number of flagship department stores have successively closed, while Purley Way thrived. Although it is possible for out-of-town and town centre offers to coexist and complement each other, Purley Way has begun to introduce town centre-type uses which are in direct competition with Croydon town centre. Added to the wider changes such as the rise in internet shopping, Croydon Town Centre's retail sector is generally seen as under-performing given its size, its good transport connections and history of economic growth.



KEY

- Croydon Metropolitan Centre
- Purley Way Masterplan
- North End Area
- Purley Way key retail and leisure parks
- Railway
- Tram line
- Key railway station

The North End area

Opening in stages between 1965-1970, the Whitgift Centre was a one of the first shopping centres of its kind to be built in outer London. The development of the centre and its surrounds, along with Croydon's post war office boom and creation of a futuristic 'mini Manhattan', put Croydon on the map. The shopping centre was, until recently, the largest shopping precinct in south-east Britain, outside of the West End of London. Designed as a series of retail courts open to the air, the centre was subsequently roofed over in the 1990's. This took place during the same period as the growth of other outer London and suburban retail centres such as Kingston's Bentall Centre, Bluewater, Wimbledon's Centre Court and others — this created unforeseen neighbouring competition and led to a period of challenges for a previously thriving centre. These challenges have continued to the present day with similar trends seen in out-of-town retail destinations such as the ones that can be found in the Purley Way area.

↑ The Whitgift Centre in the 1970s © *Francis Frith*

The Whitgift Centre occupies an area of 8.5 hectares (ha) in the urban block forming the north-eastern quarter of Croydon Town Centre. The total retail floorspace is 121,000 sqm.

↑ In the 1990s, the centre was almost completely rebuilt to an atrium design © *Neil Clifton*

In 2004, the shopping centre Centrale opened, developed from the existing — but much smaller — Drummond Centre department store. Centrale is located in North End, and faces the Whitgift Centre. The scheme is in the form of a spacious shopping mall and contains various quality comparison goods' traders. The total retail floorspace is 76,000 sqm and originally included two department stores: Debenhams and House of Fraser.

However, Centrale has not performed as well as would normally be expected with a new purpose designed shopping centre:

— A food gallery was given planning permission in 2005, with seating for 200 diners. As of 2013, the food court had no tenants and the scheme was not implemented.
— The department store House of Fraser went into administration in 2018 and closed 31 stores across the UK. The firm was then bought by Sport Directs, which has closed a further 10 stores.
— The department store Debenham's announced the permanent closure of the Croydon store in May 2020.

Croydon was also home of a third department store, located in the North End area: the flagship store Allders (formerly the 3rd largest department store in the UK). It went into administration in 2005 and the store closed in 2013. The building re-opened in the same year as 'Croydon Village Outlet', hosting 35 businesses ranging from homewares to fashion. It closed in 2019 after the acquisition by Compusory Purchase Order of the building by Croydon Council, earmarked for part of the Westfield development.

As part of Croydon Vision 2020, plans to develop and expand the town centre were formalised by leaseholder and landlord Howard Holdings plc, for which a planning application was submitted. Construction of the extension was due to start in 2009, but the landlord went into administration in 2010 and the scheme was not implemented.

In January 2013, Hammerson and Westfield formed a joint venture — the Croydon's Partnership — to redevelop the shopping mall. The joint venture company will purchase a 25% interest in the Whitgift Centre, following completion of Hammerson's conditional acquisition agreement with Royal London. An outline planning permission for the redevelopment of the Whitgift Centre was approved in 2016. It was announced in June 2020 that the scheme will not be implemented as approved.

↑ North End is a pedestrianised route which run north-south through the town shopping centres.
© LB Croydon

The Purley Way area

Retail warehouses began to appear on the Purley Way in the early 1980's, but it was only in early 1990's that planned retail-led schemes hit the ground along the length of the Purley Way. The development of the area for retail purposes was not the result of local planning guidance, but occurred as part of a national trend towards out-of-town shopping.

Overall, the Purley Way area contains a number of large retail warehouses selling a range of comparison goods. The comparison goods outlets mostly sell bulky goods such as, furniture, carpets and DIY products. The range of goods sold within Croydon's retail and leisure parks generally reflects the pattern of out-of-centre retail development that has emerged over the past 30 years or so. These uses can be seen as complementing Croydon's Town Centre-based retail and office-based uses. However, there has also been some evidence of competition between the two locations, with Purley Way attracting functions outside its 'core business' that would be better suited to a town centre location, such as restaurants and a cinema. A number of non-bulky outlets have opened in Valley Retail Park and Valley Park. Retailers in this location include Marks and Spencer and Boots the Chemist. In addition, recognised high street retailers selling shoes, sports wear and fashion clothing are present, including: TK Maxx, Topshop, Monsoon and Next.

The Valley Park Retail and Leisure Complex was delivered between 1994 and 1996 on the site of the former Croydon Power Station. It is divided into two areas: one half is a long and large modern building, hosting the entertainment and leisure offer; and the other half includes larger retail units with a large car park. The retail area is the main shopping park and includes big name stores such as DFS, which has operated on the same site since 1996. Other stores include Outfit, Sports Direct, Next, Boots and B&Q.

The leisure park opened in late 1995/early 1996 with Megabowl and Ritz Bingo Hall. Other facilities include Vue Cinema, Tenpin, a 25-lane bowling alley, complete with games arcade. Restaurants include a Frankie & Benny's, Nandos, Bella Italia, Subway, Pizza Express, McDonald's and Burger King restaurants and drive-through. A gym is situated on the first floor.

The Colonnades Leisure Park, also known as Croydon Colonnades, opened in the late 1990’s on the former site of the Croydon Water Palace, an indoor water park complex. It lies alongside the Purley Way Playing Fields, and opposite the former Croydon Airport site. Most of the original outlets in the park were entertainment-oriented, including City Limits, an indoor entertainment centre with a restaurant, sports bar, arcade and bowling facilities. It closed in 2010 following financial difficulties. Other original tenants included Gipsy Moth (a family pub), the food court, which used to house Subway, BBQ Xpress, China Wok and Karahi Cuisine. The Gypsy Moth site was demolished in 2018 to make way for a new multi-outlet retail unit, occupied by Mcdonald’s and Nando’s. A drive-through Costa Coffee also opened in 2015. Current tenants of the site include Pizza Hut, McDonald's, Premier Inn, a Kidspace indoor adventure playground, Oxygen free jumping, and Nuffield Health & Fitness Centre.

↑ Croydon Water Palace, Purley Way (closed in 1996)
© *CC BY-SA 3.0*

↑ Large retail outlet along Purley Way
© *We Made That*

↑ The Valley Park Leisure Complex © *We Made That*

1.2.1 EXISTING RETAIL LANDSCAPE

Relative importance of the sector

Croydon's retail footprint is significant. It has the highest quantum of floorspace of any London Metropolitan Centre – 30,000 sqm more than the next highest. In addition, the town centre also has a significant number of parking spaces, 8,500; almost 2,000 more than the next highest (Kingston).

The average floorplate per unit is around 470 sqm which is third highest behind Sutton (496 sqm) and Stratford (522 sqm).

In the last London town centre health check, (2017), at 17%, Croydon had the highest proportion of vacant floorspace of any Metropolitan Centre. According to Local Data Company figures, by 2019 (before COVID-19) this had increased to 21.4%.

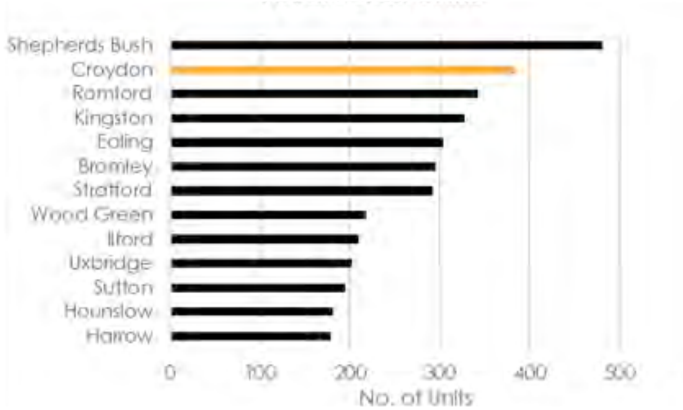


Figure 1: Total number of unit *(TC Health Check, 2017)*

Figure 2: Total floorspace *(TC Health Check, 2017)*

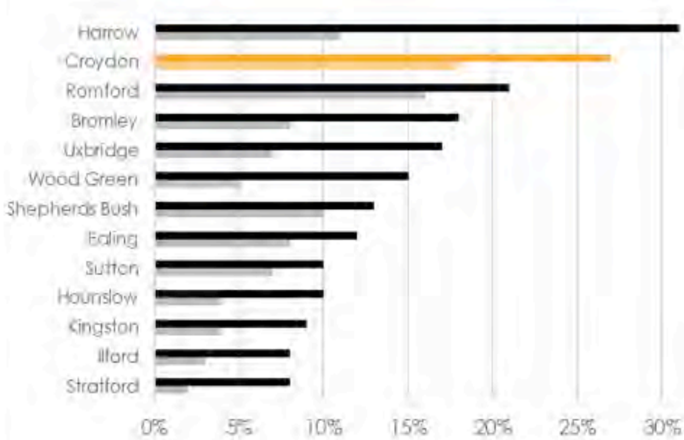


Figure 3: Retail Vacancy *(TC Health Check, 2017)*

Comparison retail spend

Estimated comparison retail spend in Croydon is 5th highest of all Metropolitan Centres at around £500bn per year. This is much lower that Shepherd's Bush and Stratford where London's two Westfield shopping centres are located. The estimated spend in Croydon is about the same as that of Bromley.

The spend per square metre is the lowest of any of the Metropolitan Centres.

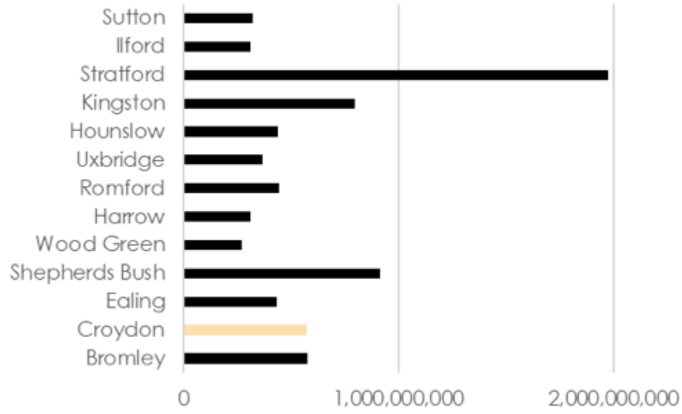


Figure 4: Total comparison spend *(TC Health Check, 2017)*

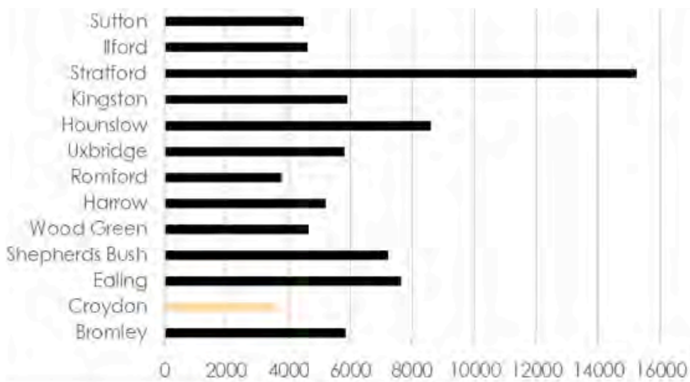


Figure 5: Total spend by sqm *(TC Health Check, 2017)*

Retail contribution to Croydon's economy

Whilst other sectors have grown in Croydon in recent years, the retail sector's contribution to the wider economic health of Croydon and its population has not been significant nor has it increased over the last decade, despite policy focus.

Retail remains a 'specialism' for Croydon town centre. However, the sector has saw a stark decline in the number of jobs it provided between 2009 and 2018. Whilst retail employment in the Town Centre has returned to 2009 levels, this uplift has fallen short of the growth seen across London and or the borough as a whole, which grew by 11% and 7% respectively over the same time period.

Over the last five years, the amount of employment in hospitality, leisure and recreation activities have also declined in the centre.

Figure 6: Benchmark retail employment *(Nomis, 2020)*

KEY POINTS

- Croydon has an oversupply of retail space in the town centre.
- The recent trend is that it has been outperformed by London's other Metropolitan Centres.
- Despite policy focus, the contribution of retail to the wider economic health of Croydon and its population has not been significant or increased over the last decade.

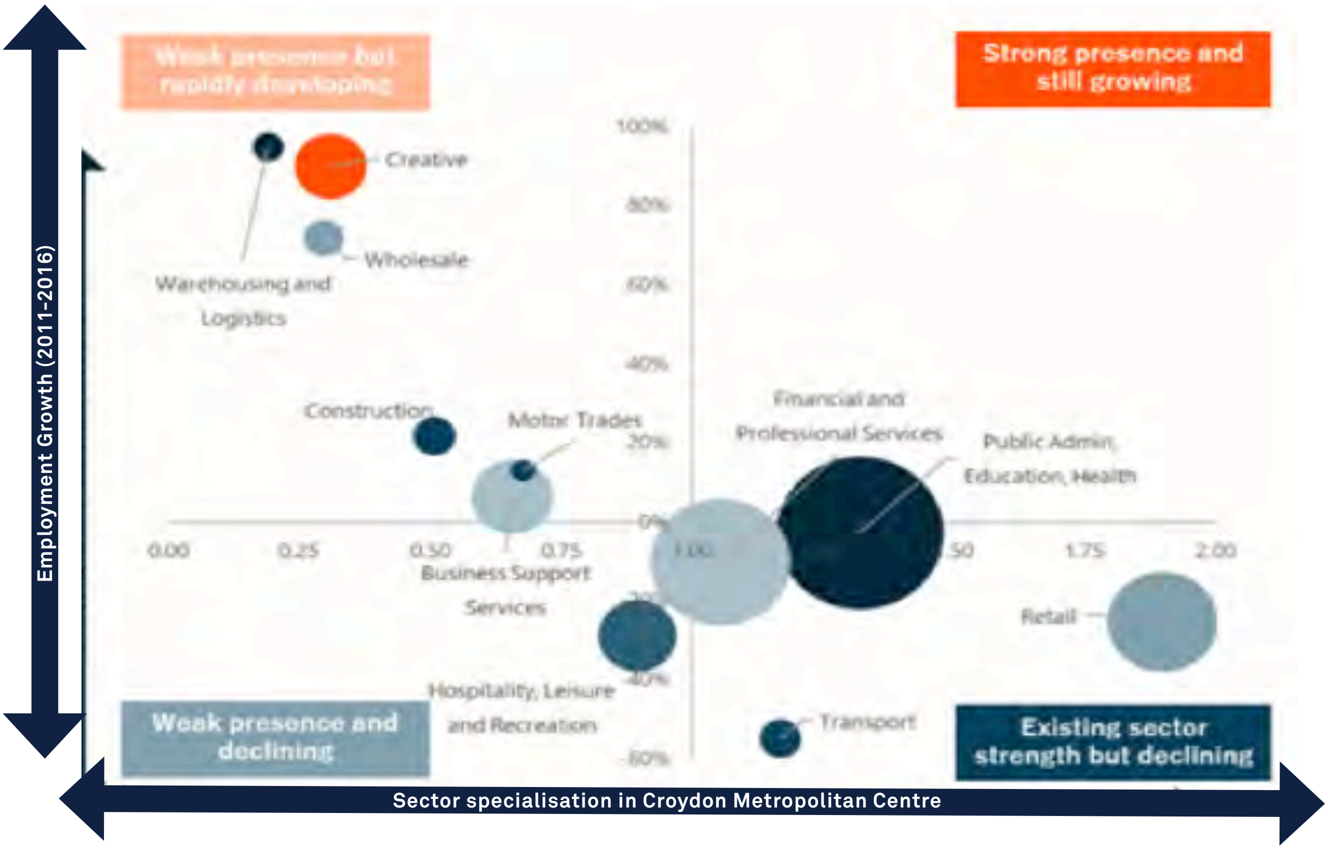


Figure 7: Sector specialism & employment growth *(Nomis, 2018)*

COVID-19 impacts

Overview

COVID-19 has had an unprecedented impact on the UK economy and is recognised as a fundamental moment for retail and town centres.

Whilst the breadth of these impacts is widely debated, it is clear that COVID-19 has and will continue to accelerate many of the structural changes seen within the sector prior to the pandemic. COVID-19 had sharpened the focus on the role of town centres, and retail more generally, providing an important opportunity to reflect and recalibrate what our high streets and retail centres should and could be.

Immediate impacts

Unprecedented growth of e-commerce
The pandemic has accelerated the pace of growth of e-commerce; by May 2020, e-commerce accounted for 33.3% of all retail spend[1], the highest on record, compared to just 19% prior to the pandemic[2]. E-commerce will undoubtedly continue to increase its market share into the future, particularly given that a significant number of buyers will be first time e-commerce 'converts'; 42% of all shoppers have said that they will shop online to a greater extent in the future[3]; with older shoppers, who may have previously avoided online shopping, are likely to make up a large part of this transition. The rapid upward curve in the share of e-commerce seen over lockdown will eventually stabilise, but will continue on its upward trajectory, likely at a faster rate than seen prior to the pandemic.

Immediate impacts on high streets and town centres
In the immediate term, there has been a dramatic drop in city centre footfall across the UK as a result of 'lockdown'; at the height of the pandemic, footfall was at just 22%[4] across the nation. This, however, hides significant variance: much of the drop off in footfall came from a decline in out of town visitors, meaning that bigger retail hubs such as London and Manchester, which have a greater proportion of out of town visitors, are witnessing the greatest drop.

Smaller, peripheral or traditionally less successful town centres, such as Southend or Basildon, have recovered their footfall at a faster rate. Whilst a less dramatic decline in footfall has been positive for these traditionally less successful town centres in the short term as shops reopen, the data gave insight into some of the structural challenges facing these smaller centres. In the long term, these places

1 https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/may2020
2 https://internetretailing.net/industry/industry/uk-ecommerce-accounts-for-19-of-total-retail-making-it-worth-233bn-20971
3 ChannelAdvisor & Dynata, 2020
4 https://www.centreforcities.org/data/high-streets-recovery-tracker/

will need greater investment in local job creation, diversification and place-making, particularly given that so many of their challenges will have been accelerated by the pandemic.

Shopping centres were harder hit, with footfall dropping by a greater extent, in part driven by perceptions around the risk of indoor settings. The out-of-town market has displayed a greater level of resilience in the short term than both shopping centres and high streets, reflecting the proportion of essential goods sold in retail parks but also the importance of perceptions around safety and ability to social distance with open air environments and expansive parking.

A proactive response by shopping centres and high streets towards these concerns in the short term will bring benefits moving forward[5] , with 63% of shoppers stating that they are more likely to buy from those taking measures to fight the outbreak.

Immediate impacts on retail businesses and shopping centres
The pandemic has heightened the pressure on many already struggling businesses. In July 2020, a number of stores were already going into administration, including Oddbins, Laura Ashley, Harveys Furniture, Victoria's Secret, Aldo, TM Lewin, Oasis and Warehouse and Kath Kidston. Others were taking drastic action to stay afloat; Debenhams announced the permanent closure of 17 stores nationwide, including their store in Croydon, and John Lewis closed eight stores, including their Croydon site in July 2020. In the long term, and as government job support draws to a close, administrations and difficult landlord negotiations will increase, with brands likely to close stores seen to have a poor long-term outlook.

5 EY, 2020

After lockdown had taken effect, Intu received only 29% of the revenue it was due on rent day. UK retailers are estimated to have paid just 14% of the £2.5bn quarterly rent due in the final week of June as they try to conserve cash and negotiate new, lower rent deals.

The ability to enforce rigorous safety standards, including the provision of enough space for shoppers to maintain social distancing, will help retailers attract shoppers. Touchless automation will likely be an investment point for many retailers as they prepare for future pandemics. In the long-term, however, decreased footfall and any ongoing limitations on the maximum number of shoppers may limit turnover, making it harder to justify rents and could lead to retailers ultimately requiring less space and redefining how values and yields are calculated.

Reopening
As shops were given the go ahead to open in mid-June 2020, footfall jumped by 40% across all retail destinations and 50% on high streets, but remained two thirds lower compared to the same time last year[6]. There was a steep increase in the number of visitors to all retail centres after the hospitality industry reopened, a rise of almost double that of the previous week[7], highlighting the importance of the bars, restaurants and cafes in attracting people into retail centres. Overall:

- Town centres, where the majority of hospitality outlets are located, saw a double digit rise from the week before.
- Footfall in regional cities saw a greater week-on-week increase than Central London, reflecting continuing unease around travel, and continued preference for local centres.
- Despite the lifting of restrictions, footfall is at still at around 50% of what it was this time last

6 Springboard, 2020
7 Springoboard, 2020

year; shopping centre footfall is at 40%; retail parks at 75%. Whilst this is to be expected, a faster bounce back was anticipated by many.

Croydon retail core reopened in mid-June 2020. The footfall was reported as gradually increasing but was 41% down on last year in July and 38% down on last year in August. Footfall data from the BID also revealed that the area of the town centre that saw the greatest footfall increase was High Street, which is typically composed by smaller and independent convenience shops.[8]

In November 2020, a second 'lockdown' forced the closure of non-essential retail shops and high street services for a minimum period of four weeks.

8 Croydon BID, September 2020

Long-term outlook

Retail was already seeing a severe decline ahead of the COVID-19 outbreak. Increased economic uncertainty will mean tougher times for retailers into the future. Whilst shopping habits will undoubtedly change in the long term, shops and restaurants won't be abandoned entirely.

More resilient local high streets?
Local high streets with a rich social dimension will be most resilient; over half of shoppers say that they will visit major towns and city centres less than they did before lockdown, with more than 50% of respondents saying they would be less likely to visit a shopping centre. The aspects of shopping that people miss the most are focused on the hospitality– bars, cafes, pubs and restaurants, rather than retail – people are reporting that these are more important than fashion shopping or access to entertainment.[9]

Changes in demand and shopping patterns
Nevertheless, the coming recession will see a reduction in personal incomes and spending, and a move toward buying for need rather than want. After the 2008 recession, research suggests that consumers did not necessarily trade down to cheaper alternatives, but sought fewer, better quality products, a trend likely to happen again in the wake of Covid-19. Fundamental changes in shopping habits and a demand for locally sourced and ethical products and trusted brands will see increased retail administrations for already struggling retailers. These trends will also lead retailers to depend more meaningfully on the trust built with consumers and new partnerships will be important as product demand changes.

It remains unclear as to whether people will return to their pre Covid-19 shopping patterns; in areas that have high skilled jobs in their locality, the short term impacts will be high, but this will gradually subside as workers return to work. However,learning

9 Springboard, 2020

from the 2008 recession, customers will turn to personally known, established or essential brands and become more value conscious; demand for new and unknown brands by both consumers and investors will likely decrease in the medium term[10]. Post 2008, these changes in consumer behaviour were maintained, suggesting that any consumer patterns established in the coming recession will have ongoing consequences.

With public transport being avoided, working from home becoming the norm for many, and strong calls to support local businesses, three in five people have expressed their preference to shop locally[11]. As many have spent more time than ever before exploring their own areas, an increased focus on local living is likely to continue. 42% of shoppers say that the way they shop will fundamentally change as a result of Covid-19, 26% say they will pay more for local products, 25% for trusted brands and 24% for ethical products. More than half say they will spend more on businesses that support their local community[12]. Again, these trends might increasingly direct footfall towards smaller and local high streets where the proportion of independent retailers is more important.

Future role of shopping and retail within high streets and town centres

High streets and town centres are still places that people want to be, with just two out of five shoppers saying that they will make more online purchases in the future.[13] Initial research shows that almost half of shoppers miss going shopping[14]: beyond consumption, shopping provides opportunity for experience, socialisation and activity.

Psychologist and Professor Nancy Sherman said in May 2020: "I think we miss the in-store experience because it is a time for socialising with friends, expressing creativity, and the atmosphere that many stores promote enhancing the shopping experience"[15].

This is not new and is confirmed by findings from a number of academic research papers. In his article 'Why do people shop where they do'[16], academic Charles Dennis identifies that the three main attributes that influence people in choosing a shopping centre over another are:

— The general layout of the place
— The accessibility
— The friendly atmosphere and pleasant aspect of the place: 'nice place to spend time'

In another study by Sipho Makgopa[17], a survey reveals that people visit shopping malls not only for the purpose of buying, but for entertainment and social purpose. Finally, in a study seeking to understand what factors attract customers to shopping malls in the UK, Cristina Calvo-Porral suggests that the internal environment of the mall - understood as a pleasant attractive environment - is the main determinant of attracting customers[18].

In all these studies, none of the identified key attributes or pull factors determining visitors' choice in visiting a shopping centre over another directly concerns shops. Therefore shopping centres and the activity of shopping is not only driven by a commercial purpose, but seem to be driven by a more social purpose with malls being a place for interactions and experiences.

10 Barclays, 2020
11 https://www2.deloitte.com/uk/en/pages/press-releases/articles/three-in-five-consumers-have-used-more-local-stores-and-services-to-support-them-during-lockdown.html
12 EY, 2020
13 ChannelAdvisor & Dynata, 2020
14 YouGov, 2020

15 https://www.romper.com/p/i-miss-shopping-experts-say-thats-\honestly-to-be-expected-22861568
16 Dennis, Charles - 'Why people shop where they do? The attributes of Shopping Centres that determine where consumers choose to shop', 2005, Palgrave Macmillan
17 Makgopa, Sipho, 'Determining consumer's reason for visiting shopping malls', 2016, Innovative marketing, Volume 12, Issue 2.
18 Calvo-Porral ,Cristina, 'Pull factors of a shopping mall', 2018, International Journal of Retail and Distribution Management

Impacts on the property market

The fallout of COVID-19 will have structural impacts on the property market which will likely only compound the challenges Croydon has faced in activating and supporting its centre. In the short-to-medium term this means an increased availability of premises, office and retail space and more void units across the local centres. This however does not necessarily mean that these spaces will meet current demand and needs.

An increase in tenant lease defaults and a short-term absence of occupier demand will push rental levels down. This will impact landlords particularly where their asset portfolios are highly debt leveraged and they are forced to breach their loan agreements. Unless these asset portfolios can be refinanced then there may be some significant changes in Freehold ownerships.

Whilst all of this is certainly regretful in the short term it could demonstrate a significant change to the property ownership status quo, particularly when considered alongside already significant transformations in the retail sector.

Big name brands and independent retailers could gain market share, whilst those in the middle are squeezed out. Smaller shop units for independent stores could see an increase in demand, alongside a mix of larger units to host bigger name brands who will increasingly use their stores for non-retail related activity; branding exercises, exhibitions, collaborations and service led activities such as personalization services.

There is an oversupply of retail space across the UK, which has been (and will continue to be) accelerated by the pandemic, and which may force change at a greater pace than could have been anticipated. There is now a critical moment in which to radically rethink our retail destinations and town centres; in short, dynamic retail within mixed-use spaces will thrive, and anything short of that will continue to struggle.

New networks and partnerships between local authorities, political stakeholders and business organisations have been created up and down the country to deal with impact of the pandemic on the high street. In this landscape there will be opportunities for Croydon to take a more targeted and interventionist role to support change.

This could include:

- Working with landlords, old and new, to encourage innovative approaches to letting and tenant interface.
- Working to identify new models of occupation focused on localised priorities.
- Supporting and encouraging start-up and SME businesses to take space through rental deposit support arrangements to unlock a new wave of occupiers and entrepreneurialism.
- Supporting and developing a range of uses and occupancy models allowing space to be ‘democratised’ away from the single occupier model. This will facilitate a more flexible and resilient system, allowing businesses to operate from smaller spaces or more flexible and affordable spaces. Given the availability of vacant grade B office space in the town centre, there is a clear opportunity to explore options to deliver new forms of workspace occupancy and operational models.

The role of the Council’s own property asset portfolios will be key, particularly when considered alongside its ability to leverage its own borrowing and guarantees to support to support a range of interventions from housing to retail to commercial uses. A broader value driven approach to asset strategy should be an important part of any future strategy.

KEY POINTS

- COVID-19 has accelerated existing trends in retail and e-commerce now accounts for 1/3 or all purchases.
- Footfall declined by around 80% during lockdown and return has been mixed – consumers are currently favouring out of town centres, in part because of their outdoor, expansive environments, the ease of parking and access to essential goods.
- Local high streets are recovering faster than larger city centres across the UK. Footfall data suggest that Croydon's High Street is also recovering at a faster rate than the North End area (in terms of footfall).
- There have already been a significant number of high street retailers going into administration; the number of administrations is likely to rise when the Job Retention Scheme comes to an end.
- Retailers are not paying or renegotiating rents. Across the UK only 14% of rents due were paid at the height of the lockdown.
- Surveys suggest that people across the UK still want to use High Streets, even if they make purchases online, as places of experience and sociality.
- There will be an increase in voids and vacancy, but this could provide an opportunity for diversification and increased influence for the public sector.
- Consumer behaviour has changed, with demand for sustainable and locally sourced products becoming mainstream; experience is becoming more important than purchase.

1.2.2 STRATEGIC AND POLICY CONTEXT

Croydon context

Croydon is a vibrant and growing borough that is experiencing significant transformation. By 2019, Croydon was the second largest borough in London in terms of population. It is home to approximately 396,837 people and this is expected to increase to just under 500,000 by 2050. These residents will need to have quality homes in which to live, as well various types of infrastructure and public facilities.

The town centre, which has traditionally not included a significant residential population, is also evolving to accommodate approximately one third of housing need; this will result in a much more diverse mix of uses, and the Opportunity Area Planning Framework (2013), as well as the related town centre masterplans, have started to set parameters for this.

Croydon Town Centre and Opportunity Area have more shops in one location than anywhere else in London apart from the West End itself. It also enjoys some of the best transport connections in the UK, with London's only tram system running through it, two rail and overground stations at East and West Croydon providing direct connections to Central London, St Pancras International, Gatwick airport and the South-East.

Town centre networks
Croydon Metropolitan Centre is part of a wider network of district and local centres, which are recognised as a key element of the economic and social fabric of the borough. They operate as part of an interrelated network and hierarchy of retail and associated service provision, with changes to one having the potential to affect others.

Croydon Metropolitan Centre has the highest level of regional and sub-regional accessibility in the borough, and the case for it to be the principal location for the town centre uses is supported by the importance attached to Croydon Metropolitan Centre in Croydon Local Plan (2018) and the London Plan. While it is experiencing considerable change and investment through ambitious regeneration programmes, district and local centres are experiencing more incremental changes and of a smaller-scale. However, they fulfil a range of functions, and strategies and policies in place recognise their importance and the need for them to function as successful economic and social places.

The relationship between Croydon Town Centre, — as a large Metropolitan Centre but also as an increasingly residential space — and the network of district and local centres, will need be well thought through. In particular, the challenge is for Croydon Town Centre to not compete with smaller and local centres, while attracting visitors, workers and residents.

Croydon Town Centre & Opportunity Area
Plans to regenerate Croydon Metropolitan Centre have been a key focus for many years, illustrated by the long series of planning policy measures put in place to facilitate and plan for regeneration, and by comprehensive planning policy framework now in place to support it.

Croydon Council has a clear vision for the revival and development of the Croydon Opportunity Area which aims to attract major investment, renewing the retail offer, addressing the severance issues and poor public realm, and bringing a new residential community to the town centre.

A proactive approach to planning is demonstrated by the Council's masterplans for the town centre. These, along with the Local Plan and the Opportunity Area Planning Framework (2013), provide a strategy for attracting inward investment and set guidelines for the development of the Croydon Opportunity Area. The OAPF is a joint Mayor of London and London Borough of Croydon's document.

The key objectives of the OAPF are to:
— Build on the Croydon Opportunity Area's Metropolitan Centre status;
— Deliver 7,300 homes to accommodate 17,000 new residents;
— Renew and grow the Retail Core;
— Revive the town centre high streets and markets
— Focus high quality commercial space around East Croydon;
— Deliver new and improved streets, amenity spaces and enhance the built form;
— Sustainable development and good growth;
— Providing quality physical and social infrastructure to support new communities;
— Providing opportunities for the cultural and creative sectors to establish, grow and thrive, building on the Creative Enterprise Zone programme;
— Providing physical and social infrastructure to support new communities infrastructure to support existing and new communities.

Croydon Masterplans

Croydon Metropolitan Centre is a complex arrangement of places, each with its own character and built form, but each also presenting different mix of uses — alongside residential — which are complementary. Ongoing changes, regeneration projects and redevelopments are shaped by five town centre masterplans: the East Croydon Masterplan, the West Croydon Masterplan, the Fairfield Masterplan, the Mid Croydon Masterplan and the Old Town Masterplan. All of them were adopted between 2011 and 2014. The Purley Way Masterplan is also under preparation (2020).

The North End area, currently comprised of the pedestrianised North End, adjoining streets as well as the two large shopping centres (Whitgift and Centrale) should therefore complement existing and forthcoming uses provided in the other parts of the town centre. A summary of the identity, functions and uses for each of the Masterplan areas is provided below.

East Croydon
- *Landmark urban and commercial quarter & key transport interchange*
- Major commercial buildings including grade A office spaces
- Mix of new residential uses and hotel provision
- Public realm improvement and new public spaces fit for civic and high quality cultural activity

West Croydon
- *A new frontdoor to Croydon* with an improved station, transport interchange and better integration and links to the centre
- New uses relevant to station environment including convenience retail, social infrastructure and leisure uses

Mid Croydon
- *Mixed use residential-led neighbourhood & civic hub* (public spaces, Town Hall, Central Library)
- Revitalised civic and cultural venue encapsulating the library and museum
- Retail, leisure and entertainment uses to support residential uses

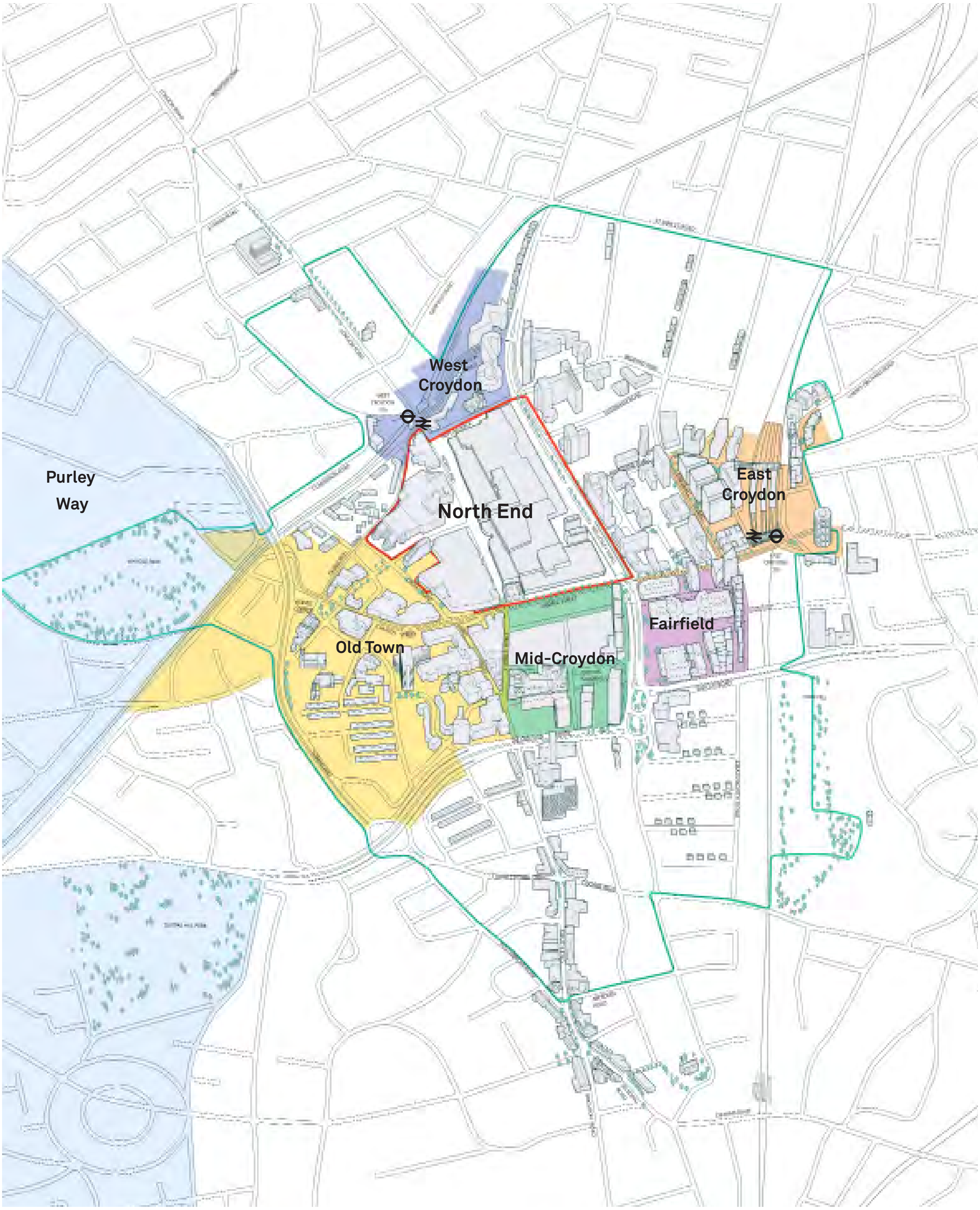
Fairfield
- *Cultural and education quarter*: key destination for arts, education and culture (consumption)
- Refurbishment of Fairfield Halls (delivered) and new public square
- New facility for Croydon College
- College green scheme to provide 1000+ residential units alongside with new cultural and employment spaces

Old Town
- *Croydon's historic heart* and high street home of an independent business community including a mix of retail, food and drink and services uses.
- Heritage character and destination
- Home of historical Surrey Street market
- Place for independent and niche retail, business start-ups, community and night-time uses.

Purley Way Masterplan
- Significant employment location with new and intensified industrial development
- New Local centres embedded into new existing neighbourhood: provision of new residential development, social infrastructures and supporting retail/services uses.

KEY

The Old Town Masterplan
Mid Croydon Masterplan
West Croydon Masterplan
The Fair Field Masterplan
East Croydon Masterplan
Purley Way Masterplan
Croydon Opportunity Area
Study area boundary


West
Croydon
Purley
Way
North End
East
Croydon
Fairfield
Old Town
Mid-Croydon

North-End area

This section presents the vision for the North End area as set out in the OAPF, and existing proposal for the comprehensive redevelopment of the Whitgift centre and adjoining buildings. While a number of objectives for the area remain relevant today, it is clear that some of the outcomes and principles have to be questioned and reviewed, and in light of recent trends, political priorities and broader societal challenges that need to be acknowledged and addressed.

Croydon 'Retail Core' in the OAPF
There is no masterplan for the North End area, an important part of the jigsaw is missing. However, the Opportunity Area Planning Framework (OAPF) sets out the approach and key outcomes for revival and growth of the area, named as 'Retail Core' in the document.

The OAPF recognises that Croydon's retail offer is tired and does not live up to its potential. It claims a current catchment area of the whole of the borough and extending to Warlingham and Caterham in the south and Streatham in the north, but aims to support the development of the town as a retail destination for south London and the wider south-east of England.

In relation to the North End area, the OAPF planned for it to become a mixed-use, retail-led destination with new homes, leisure and other workspaces forming an integral part of the area's make-up. It emphasised that the various shopping centres (including Whitgift and Centrale) are 'mutually complementary'.

The OAPF supports temporary 'meanwhile' uses, which it recognises as important 'in the function and life of the high streets'. The OAPF states that temporary use of vacant shops will be encouraged 'in order to maintain economic activity and interest until more permanent retailing can be established'. The OAPF also supports a more flexible approach to change of use and supports the central government policy of allowing conversion of office space into other uses, including retail.

The Framework identifies the Purley Way development and its potential to as a substantial employment zone for the distribution and retail sector. The plan sees this development as a benefit — the borough can offer both town centre and out-of-centre locations for inward investors.

The OAPF identifies a series of outcomes that new development in the retail core should seek to deliver:

— Regenerate the retail offer in line with the COA's designation as a Metropolitan Centre;
— Provide a retail-led, mixed-use destination;
— Provide for approximately 1,100 homes across the Retail Core over the 20 year life of plan and the associated amenity and social requirements of a residential population;
— Provide other uses including leisure and complementary work space;
— Provide a new high quality, full range department store that would achieve a joined up, comprehensive and complementary retail circuit across the whole of the North End area;
— Secure high quality architecture and design for the built environment across the COA;
— Provide a joined up servicing and delivery access;
— Provide a high quality 24 hour publicly accessible east/west route from Wellesley Road to Old Town;
— Provide new and improved east/west and north/south routes;
— Enhance the streets and roads within and surrounding the Retail core area including; Wellesley Road, North End, Poplar Walk, George Street, Church Street, Church Lane, Frith Road and Tamworth Road as well as the internal routes;
— Locate tall buildings closest to Wellesley Road away from the most sensitive locations in terms of privacy, heritage security and overshadowing;

The OAPF further states that achieving the above list of outcomes would be most achievable through a comprehensive approach, as part of a large redevelopment and renewal approach.

The Whitgift outline planning permission
In 2013, Hammerson and the Westfield Group formed a joined venture (Croydon Limited Partnership) to redevelop the Whitgift Centre. In 2015, the venture gained consent for an outline planning proposal for the site which proposed:

— The comprehensive redevelopment of the Whitgift Centre;
— The provision of a high-density retail-led mixed use development, including a range of residential floorspace providing between 626 and 967 residential units;
— The provision of other town centre uses, including leisure (cinema, bowling, gym), office and community uses as well as hotels;
— The provision of a new large department store and a new anchor store for M&S;
— Increase in car parking space capacity.

The key aspects of the proposed development are as follows:

— The establishment of a strong urban pattern with clear pedestrian routes across the site and a sequence of threshold spaces that relate the new development to its immediate urban context;
— The shopping centre building at the heart of the site, which provides the retail and leisure accommodation;
— The establishment of legible entrances to public routes through the site;
— Residential uses, and potentially student accommodation or hotel uses, to be located along Wellesley Road;
— Creation of the public spaces at either end of the new east-west route, Poplar Walk, Grammar School Yard and Whitgift Court;
— Building envelope set back in sensitive locations to enhance the setting of adjacent listed buildings.

In early 2020, it has been confirmed that the redevelopment of the Whitgift Centre, as proposed in the outline planning permission, will not be delivered.

KEY POINTS

- The OAPF states that Purley Way and Central Croydon should be complimentary but negative impacts of out-of town shopping centres are not acknowledged.
- In the OAPF, there is no direct mention of how recent trends and changes in retailing will be addressed, rather it appears that the physical changes will drive regeneration and attract inward investment.
- The proposed scheme - as currently approved - would increase the retail floorspace by 37%, the leisure floorspace by 15% and the car parking space capacity by 45%. Evidence however suggests an over-provision of retail floorspace in the town centre. The provision of further car parking spaces is also to be questioned in light of Croydon’s climate emergency agenda.
- Outside of retail, other uses are limited inteh consent and needs for other types of use (eg. employment, culture, community, residential, public/green spaces) do not seem to be well-understood.
- Overall, there is no direct mention of how the redevelopment of the North End area should respond to key societal and environmental challenges: climate change, public health, inequalities.

1.2.3 COMPOSITION & CHARACTERISTICS

Local character & heritage

From market town to a 1960's edge city
Croydon Town Centre is one of London's biggest 'growth centres' and is attracting considerable investment, which is progressively changing the face of the town centre. But this isn't the first time Croydon has endured such a concentrated period of investment and development. The town centre's built history is one of short bursts of rapid growth, interspersed by periods of change, or decline, echoed in shifts in built style and character.

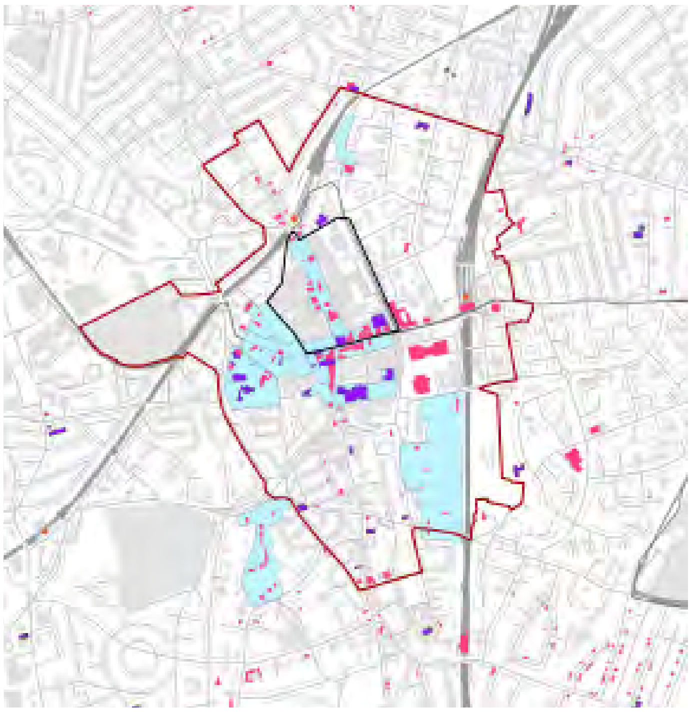
Croydon was a market town until the mid-nineteenth century. The railway connected it to London and the South East region from the 1840's onwards, developing it as a suburban centre around London in the late 19th and 20th Centuries.

During WWII, Croydon was heavily bombed, and in the 1950's, it was identified as a new out-of-centre office location as part of the decentralisation of office space from central London. An intense period of commercially-led construction followed, creating a 'mini-Manhattan' skyline of multi-storey office blocks that is readily recognisable today. This was accompanied by considerable investments in road infrastructure and accompanying multi-level car parks, making the town centre still dominated by car traffic today. At that time, the Whitgift Centre was planned, along with key social, cultural and civic spaces (e.g. Fairfield Halls).

Overall, Croydon Town Centre today is not only the result of wartime bombing, but the result of a strong civic ambition, popular aspiration, and imperfect political and economic speculations.

A strong heritage of architectural contrasts
Today, Croydon Town Centre is full of architectural contrasts and contains buildings and infrastructures that date to a wide range of periods in history. The area contains 35 statutorily listed buildings, locally listed buildings and scheduled ancient monuments as well as 5 Conservation Areas. These heritage assets span a wide range of ages and styles, from the medieval through to the modernist periods. There is a clustering of Conservation Areas and listed buildings along the main high streets in Old Town and in the North End area. This coincides with the growth of the town centre around the former Archbishop's Palace, and its expansion along Church Street to Surrey Street, North End, the High Street, and George Street between the 16th to 19th Centuries. Whilst a significant portion of the town centre's heritage assets are focussed in the Old Town and the North End area, there are also heritage assets in other areas of the town centre, as well as in its surroundings.

The OAPF states *'It is this historic pattern of development that has resulted in one of the Croydon Opportunity Area's most defining characteristics, which is the dramatic juxtaposition of scale, character and appearance. This juxtaposition adds to Croydon's rich and dynamic character and results in some interesting visual contrasts – tall beside small, and old beside new. In the future this design characteristic can be supported where it achieves a high quality design.'*



↑ A busy George Street with pedestrians and the tram route, with a view of No1 Croydon, one of many new buildings constructed in the growing town of Croydon in the 1960s.

KEY

- Listed buildings
- Locally listed buildings
- Conservation areas
- Croydon Opportunity Area
- North End area
- Railways
- Roads
- Buildings
- Green spaces

↑ The Hospital of the Holy Trinity on the corner of George Street and North End is a Grade I listed building. It was founded by Archbishop John Whitgift on 22 March 1596.

↑ George Street was almost entirely rebuilt in the second half of the 19th century as a high end shopping street. It is characterised by a largely consistent form of Victorian commercial buildings of considerable individual interest and group value.

Public realm, open & green spaces

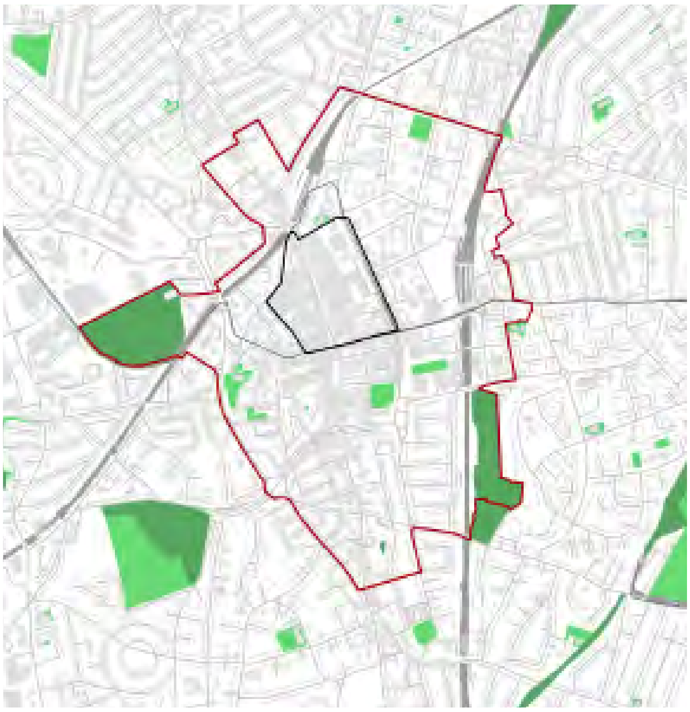
Whilst there are parks and large open spaces towards the outskirts of the town centre, green, open and public spaces, as well as wider biodiversity provision are lacking within the town centre's urban grain.

Car-dominated streets are at the centre of both Croydon Town Centre, and some of its problems. The lack of open public and civic spaces is mainly a legacy of the property boom of the 1960's. The centre has been re-designed with car at the forefront of design and pedestrian connections and open and green spaces were secondary considerations. Overall, post-war developments created deep severances in the town centre and have been the root of the challenges of poor connectivity for people, accessibility and lack of consideration of inclusivity in the public realm and built environment.

Since the 1960's, there has been no large paved square or open area within the town centre. Large scale concrete buildings replaced historic public and green spaces: the Whitgift Centre was built on a cricket pitch. North End was pedestrianised in the 1990's but today, the street is a shopping more than a public or civic space.

However, this is slowly changing and greater emphasis is being put on delivering good quality public realm and open and civic spaces in the town centre with the provision of a new outdoor plaza underway as part of the Fairfield Halls' refurbishment and the future delivery of renewed Queen's Gardens, among others.

Croydon is increasingly transforming its existing public realm, and delivering new streets, public spaces and pocket parks through its planning framework and coordinated programming. Improvements are delivered by the Council as well as by private developers and other public sector partners. Procedures have been put in place in order to ensure longevity, high quality, connectivity and coherence of public realm and the networks of public spaces and parks.



The North End area's urban character

Today, North End remains Croydon's principal shopping street and part of the historic north-south route that connects Croydon to central London and Brighton.

North End and George Street retain frontages of 19th Century buildings reflecting Croydon's commercial prosperity at this time. The buildings are of high quality and protected as part of Central Croydon Conservation Area (a number are also listed and locally listed). The relationship between the Victorian shopping streets and post-war modernist developments is important to its character.

Building heights on North End range from the modest domestic scale of two-three storeys in some of the oldest buildings — including the Grade I listed Whitgift Almshouses — to a maximum of four storeys in the later 19th century commercial buildings.

Two large shopping centres — the Whitgift Centre and Centrale — occupy most of the built-up area behind the older buildings on North End. The Centrale shopping centre has a modern frontage on North End. The Allders Department Store, on North End and George Street, was the flagship store for Croydon entrepreneur Joshua Allders in 1862, and grew over time to be the third largest store in the UK in early 2000's. Buildings on George Street are at a consistent height of three to four storeys, with four storey buildings concentrated at the north-east corner with Wellesley Road.

KEY

- Green spaces
- Site of nature conservation importance
- Croydon Opportunity Area
- North End area
- Railways
- Roads
- Buildings
- Green spaces

The urban form of Croydon Town Centre gives rise to other problems for the North End area. Post-war development was centred around car use and created deep severances and accessibility issues in the town centre. This was further exacerbated in the 1990's with the addition of a roof over the Whitgift Centre, and development of large footprints in the North End area. East to west routes across the heart of the town centre through the North End area are limited, of poor quality and difficult to navigate during the day and at night.

↑ The pedestrianised North End with a view on the Town Hall Clocktower.

Retail composition & characteristics

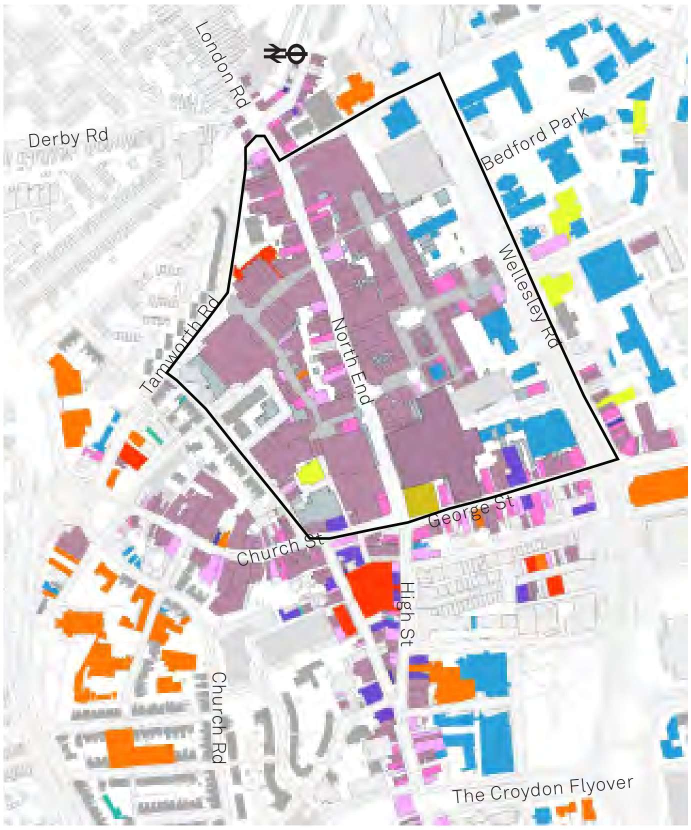
The Whitgift Centre was developed in the 1960's when urban theory favoured the segregation of different uses, and this has resulted in the provision of an area dedicated quasi-exclusively to retail uses.

The pedestrianised North End has the appearance of a traditional high street, but retail floor-plates are typically large and occupied by retail chains, including a range of large outlets stores (e.g. House of Fraser, Mark & Spencer, Next and Primark).
The shopping centres are mainly composed of comparison retail uses. Overall, the offer is mostly mainstream with no high-end retailers. The department stores have been affected by changing trends in the last two decades, and House of Fraser is the only department store still operating. The convenience and leisure offer is relatively limited, with only a few cafes and recreational activities. However, a number of community organisations have taken up spaces in the Whitgift Centre and Centrale in recent years (e.g. Croydon Voluntary Association, Lives Not Knives, Turf Projects, The Wellness Centre).

The arrangement of buildings, structures and spaces across the North End area produces a complex pattern that is difficult to use and comprehend. The shopping centres form a particularly impermeable block, and the interface of North End with Wellesley Road to the west and West Croydon Station to the North is deeply problematic.

Croydon's historic high street is located just to the south of North End and offers smaller retail units, and a more varied and independent mix of uses, including cafes and restaurants, take-aways, shops and services, community spaces and a few bars.

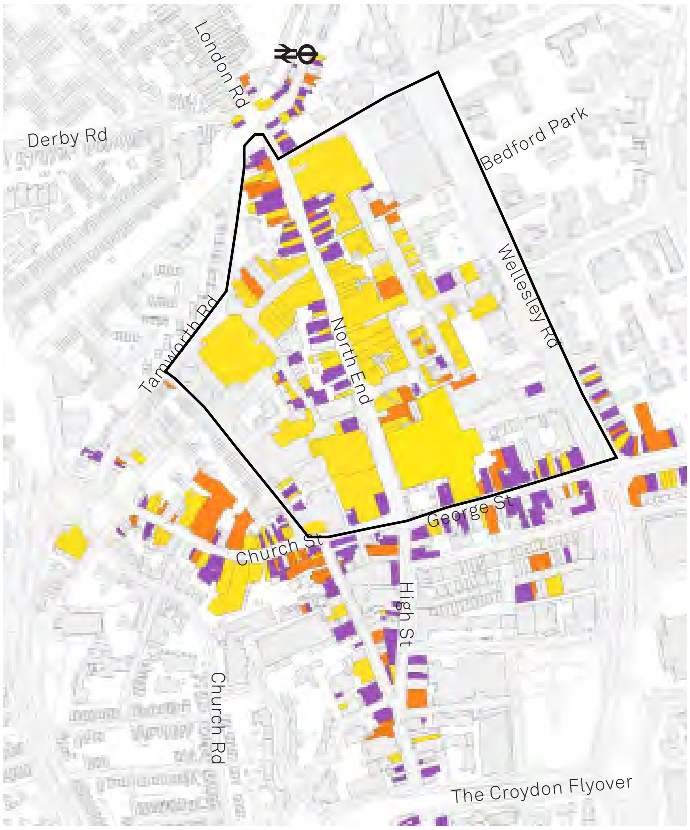
Vacancy rate in the North End area is very high and increasing year after year. 2018 retail data indicates that 41% of the units and 32% of the total floorspace is currently vacant. Impacts from the COVID-19 crisis are yet to be fully seen, but vacancy is expected to further increase in the coming months.



GF use class (2018)

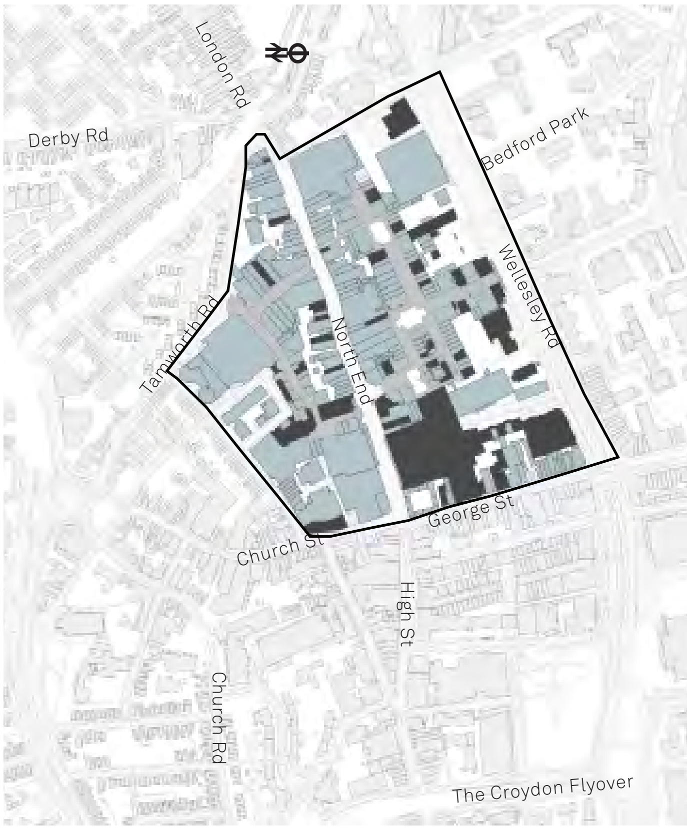
- A1 Shops
- A2 Fin. & prof services
- A3 Restaurants/cafes
- A4 Drinking est.
- A5 Hot food takeaways
- B1a Business
- B1c Light Industrial
- B2 General industrial
- C1 Hotel
- C2 Resi.institutions
- D1 Non-resi institutions
- D2 Assembly and Leisure
- Other

— The North End area is quasi-exclusively composed of retail uses.
— Future uses will have to complement and distinguish themselves from high street and retail uses found along High Street, Church Street and George Street.



GF retail type (2018)

- Comparison
- Convenience
- Services
- Non retail uses



GF Vacancy (2018)

- Vacant
- Occupied

— Convenience retail is limited within the North End area, but also in the wider town centre.

— Increased residential densities will generate an increased demand in convenience retail.

— Vacancy rate is very high within the North End area. It mainly concerns small to medium units (typically less than 200sqm) but they are also some larger vacant floor-plates (e.g. Allders).

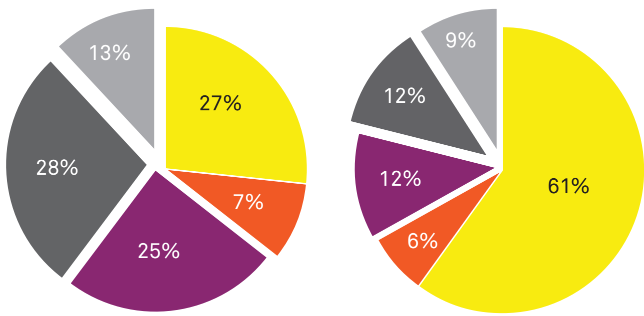
The adjacent charts show the retail composition in Croydon Metropolitan Centre, the North End area, and the Purley Way area.

The retail offer in Croydon Metropolitan Centre is dominated by comparison retail, making up 61% of the floorspace overall. In recent years, the comparison retail floorspace has decreased while retail services floorspace (and in particular health and beauty, and hospitality/leisure) and 'other' retail floorspace (non retail uses including community uses, healthcare and education, professional services) have increased. Vacancy has also increased in recent years, with 28% of the retail units and 12% of the retail floorspace being vacant in 2018.

In the North End area, the retail offer is dominated by comparison retail, whilst convenience and services make up only 11% of the total floorspace. Vacancy is also higher than in the rest of the town centre overall.

Whilst retail in Croydon Metropolitan Centre has struggled in the past decades, retail in the Purley Way area has been relatively successful. The retail offer there differentiates from other industrial locations, where retail is typically dominated by comparison retail (bulky goods outlets). In the Purley Way area, retail services make up more than a half of the total retail floorspace and typical 'high street' traders are operating from large outlet stores. There are a number of leisure and recreational facilities including the Hilton National Hotel, an 8-screen multiplex cinema, a bowling alley and some restaurants.

Croydon Metropolitan Centre



Composition by unit

Composition by total floorspace

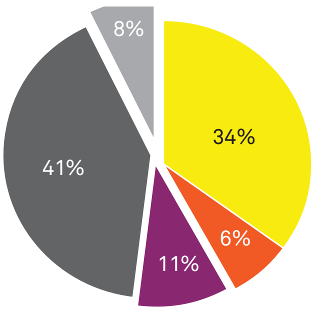
Evolution 2014-2018

- -11% comparison retail floorspace
- +35% vacant retail floorspace
- + 50% increase 'other' retail floorspace
- +50% services retail floorspace

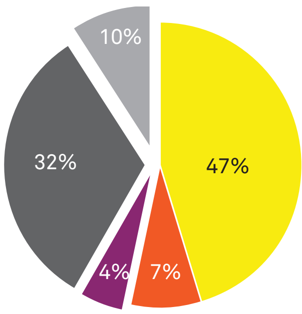
GF retail type (2018)

- Comparison
- Convenience
- Services
- Non retail uses

North End area

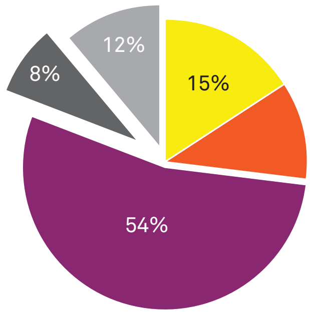


Composition by unit



Composition by total floorspace

Purley Way area



Composition by total floorspace

Evolution 2014-2018

- -25% comparison retail floorspace
- +45% vacant retail floorspace
- -10% convenience retail floorspace
- +215% 'other' retail floorspace

GF retail type (2018)

- Comparison
- Convenience
- Services
- Non retail uses

Evolution 2014-2018

- +20% retail services floorspace
- +25% vacant retail floorspace
- +50% 'other' retail floorspace

GF retail type (2018)

- Comparison
- Convenience
- Services
- Non retail uses

Demographic profile

Who lives in the town centre?
The dominant land use in Croydon Town Centre is office space, with retail space and car parking coming second and third. Until very recently, with the delivery of new residential-led developments, Croydon town centre was not a dense residential area. It had a population of 8,158 at the 2011 Census. The 2016 based GLA housing projections predict the town centre population to be multiplied by 3 between 2011-2040 due to natural population growth and the planned delivery of around 7,300 homes.

According to recent demographic data and projections[1], the population of the town centre is young , with children and young working age groups making up a high proportion of the residents.

The town centre is very diverse and has a large internationally-born population, with 43% of residents estimated to be born outside the UK in 2018[2]. This is also reflected in the ethnic diversity of the population, with half of the residents being from a minority background.

The Home Office Service & Support Centre on Wellesley Road has an influence on this diversity, with many international migrants and refugees living in the town centre or immediate surroundings[3]. Croydon has also the highest rate of looked-after children compared to all other London boroughs, and a significant portion of these children are unaccompanied Asylum-Seeking children (UASC's) . Finally, the town centre and immediate surroundings are home to a high number of temporary accommodations.

The overall profile of the residents is likely to change in the coming years, with the delivery of large residential-led schemes in the town centre. It is difficult to anticipate changes in the demographic composition of the town centre, but given the type of housing schemes in the development pipeline, it is likely that Croydon will increasingly attract young professionals and young families, as well as students.

Residents are overall more qualified that in the rest of the borough, but high levels of deprivation in relation to income and access to housing and services remain.
Levels of deprivation in Croydon Town Centre have improved in the past decades but remain significant. The area is still in the top 30% most deprived areas nationally. The town centre scores particularly badly in relation to income deprivation (in the top 20% most deprived areas nationally), indicating the presence of a large proportion of residents on low incomes[4]. On the Income Deprivation Affecting Children Index, the western part of the town centre is in the top 20% most deprived neighbourhoods in the UK.

The town centre also scores within the bottom 10% most deprived nationally in terms of barriers to housing and services domain - measuring physical proximity of local services and issues relating to access to housing such as affordability and homelessness - scoring worse than in 2015.
The town centre sits within a high concentration of un-affordability with land values being much higher due to strong transport links and investment potential[5]. There is a relatively low level of home ownership in the town centre with 27% of the residents owning their home.

Overall the population is relatively highly skilled with qualification levels being above that of the borough and the UK as a whole. Education attainments are also good and improving year after year.

1 2016 based housing projections (Census 2011)
2 ONS Estimates, 2018
3 Croydon Borough Profile, 2019
4 IMD, 2019
5 Croydon Borough Profile, 2019

There are clear challenges to be addressed around quality of life, health, and access to green spaces. Post-war Croydon was designed for cars. In the Croydon OAPF Impact Assessment, lack of access to green and open spaces was related to general inaccessibility for pedestrians and cyclists due to physical segregation created from rail and road infrastructure. However, data shows that only 20% of Croydon Town Centre's resident population uses private transport modes to go to work, and car ownership is considerably lower in Croydon town centre (35%) than in the rest of the borough (60%)[1].

Data from Greenspace Information for Greater London (GiGL) also reveal that only 22% of households in the town centre have access to green spaces (based on travelling distance), which is much less than other parts of the borough. In addition to this, the town centre scores in the bottom 10% most deprived nationally in the Living Environment Deprivation Domain, which measures the quality of housing, air quality and road traffic accidents.

Levels of crime are high, indicating a weakened social fabric.
Levels of deprivation in relation to crime have worsened since 2015, and parts of the town centre are ranking amongst the top 10% most deprived in regards to crime[2]. Crime rates above the London and England averages are reflected across different categories, with violent and sexual offences, and anti-social behaviour being the largest categories. Police data for stop-and-searches and convictions show a cluster of incidents in the north west of the town centre, especially around the North End area[3].

KEY POINTS

- A growing residential population.
- A high proportion of children, and young working age groups, and an increasing representation of young professionals, students and families.
- An ethnically diverse population with a high representation of BAME groups and high proportion of internationally-born residents.
- A relatively well-educated population with qualification levels being above that of the borough and the UK as a whole.
- High levels of deprivation remain in relation to income and access to housing and services.
- Clear challenges to be addressed in relation to quality of life, access to green spaces, air quality, and traffic.
- High levels of crime indicating a weakened social fabric

1 ONS Estimates, 2018
2 IMD, 2019
3 MET Police data, 2020


OUTLET
© Inside Croydon

2. EMERGING & FUTURE TRENDS

2.1.1 RETAIL MARKET CHANGES

Retail market insights

Overstated importance of retail?
Retail is less important to town centres and high streets than is usually assumed in policy and strategy. In London retail and hospitality accounts for only between 10 and 20% of all employment on town centres and high streets[1]. The actual employment mix is much richer, with provision of office-based employment, alongside workshop type activity, public sector and civic functions alongside charity and civil society work.

In outer London, town centres and high streets are a more important contributor to the economy 16% of total employment and 21% total business[2], reducing to 12% and 19% respectively for inner London.

A propensity towards, 'town centre first' policy and metroisation has meant that town centres have seen higher population growth in recent years, compared with other areas. Between 2012 and 2017, high street areas saw a 6% population growth, compared with 3% in non-high street areas[3].

Centres are now also younger, with the average resident 2.5 years younger in 2017 than their counterpart in 2002[4], in part led by the return of urban working attracting young professionals. Attracting business investment in jobs and providing sufficient residential uses at different ranges of affordability will support the growth of local resident populations. Being in a neighbourhood with good access to public transport and proximity to restaurants and leisure or cultural facilities is more important to people than being close to shops. Proximity to workplace is of equal importance, reflecting the increasing importance of city centres as places to work, live and gather[5].

In terms of jobs, 'knowledge-based' jobs are taking an increasing share of all jobs in city centres. Town centres and high streets play an important role in supporting London's knowledge economy; these types of higher paid/ higher skilled jobs increasingly locate near town centres and high streets, a trend that has become more prevalent over the last 20 years[6]. The centres that have focuseded on attracting high skilled jobs to their town centres have remained resilient despite the tricky conditions they are operating in. Creative and cultural industries have also proved important for the vitality and attractiveness of a city centre, having indirect benefits for the broader experience of the area; the co-location of bars, restaurants and cultural activities more generally help to build local identify and develop local night-time economies.

Oversupply of retail space and diversification
Ahead of the onset of COVID-19 there was already an oversupply of retail space in the UK. in London alone, over 2,000 retail units have been empty for six months, rising to 11,000 for those which have been empty for two years[7]. As more retailers fall into administration, and others look to rationalise their portfolios, vacancy rates are likely to increase. Increased vacancies will provide an important opportunity to respond to growing pressures and demand on public spaces and community infrastructure through local first principles; vacant units can be used creatively to meet the needs of local communities, building public value and supporting the wider vitality of the high street.Commercial space needs to be protected and expanded, to accommodate future growth, allowing city centres to remain resilient, despite changing trends in retail. To remain resilient and successful, high streets must be seen as places to do business, to live and to gather.
Diversification from retail is not a new trend in the UK, Manchester City Centre has performed well in terms of growth; since 2002 they have made room for an additional 20,000 residents and 70,000 jobs since

1 High Streets and Town Centres: Adaptive Strategies, GLA 2020
2 ONS, Business Count 2020
3 ONS, 2018
4 ONS, 2017
5 YouGov, 2015. 1,725 residents from four city regions: Brighton, Manchester, Swindon and Sheffield

6 Centre for Cities, 2019
7 Centre for Cities, 2020

1998. Cambridge has the lowest vacancy rate in the UK[8], and is dominated by 'high-quality' retail; high-end shops and shopping centres and a strong bar and restaurant presence. Birmingham, has a similarly low vacancy rate, with a stronger wider economy; cities that have invested in high-skilled, well-paid jobs and a diverse mix of office, leisure and retail are able to generate a greater level of spending power and footfall, which in turn supports a more diverse and resilient economy.

The physical store remains important
Despite the rise in e-commerce, the physical store will remain the dominant sales channel for retailers[9]. Even as digital sales rise, physical stores will continue to play an important role in that process; on average, retailers record a 12% increase in online sales in the catchment area after opening a store[10]. As e-commerce rises, shops will become less about in store spend and more about building a brand and connecting with consumers; retailers will need to expand their service offer and focus on experience-led retail. The role of bricks and mortar stores will be to support sales; flagship or concept stores will be key in attracting customers, developing a distinguishable identity and building trust. Local partnerships and creative or cultural collaborations, along with in-store events or exhibitions will support this process. This, in turn, will drive demand for higher quality, and in some cases, larger, shop units. As retail footfall declines, town centres will need to focus on the hospitality and experience offer provided; pubs, bars, restaurants and cultural spaces and activities will become increasingly important in attracting visitors.

Economic uncertainty has a deep impact on retail. 2019 had the slowest rate of growth in retail since 2010, partly as a result of Brexit, whilst continued uncertainty, exacerbated by COVID-19, is likely to continue this slow growth[11].

8 https://www.centreforcities.org/blog/quality-streets-the-city-centres-offering-the-best-retail-experience/
9 REVO
10 GlobalData
11 Deloitte 2020
12 Discussions with local letting agents have taken place in June/July 2020 to get 'on-the-ground' insights

VIEWS FROM THE GROUND[12]

- Over-valuation causing problems in terms of landlords and owners investing in assets.
- Zone A retail in Croydon is currently going through a correction. The price achieved on North End have been declining, potentially settling at less than half of those achieved e 2 years ago.
- Local businesses are prevented from taking on space as covenants are seen as weaker limiting rent free on offer and preventing refit for these operators.
- Turnover rents are becoming the norm. The market does not know how to price or account for these.
- These trends are expedited by COVID -19, but were happening anyway.
- Whilst there is evidence of evolving office demand in Croydon, with would not mitigate the impact of the retail voids and employment losses.

KEY POINTS

- Population in and around centres has grown, which has supported a diversification in functions of centres. This has included food and entertainment, but also an increase in knowledge economy jobs
- The importance of retail to town centres and high streets is probably overstated
- Despite the increase in e-commerce, the shop remains the main sales channel for retailers

Retail & property lettings

The nature of the short and medium term intervention in Croydon will be dictated by the prevailing market conditions and the inevitable corrections in valuation which will take place (and indeed were taking place) in the local market.

To assess the current position of the retail property market in Croydon, consultation with agents currently acting on behalf of landlords within the town centre have taken place in June/July 2020.

VIEWS FROM THE GROUND: NORTH END

North End has been the highest value location in Croydon historically, achieving rents above £200psf ITZA (in Zone A). This however has been falling for the last 2 years.

Recent deals suggest that the prevailing rents have fallen to 50-60% of their previous rates. The Works – (not prime pitch but very good secondary) at 145/147 North End agreed a deal in March 2018 at a rent of c. £120K pa (£88 ZA) when the previous rent had been almost £200K pa.

Very little activity has occurred recently. In line with the national trend, a number of operators have been looking to break leases or renegotiate their position, One vacant unit on North End had been achieving £245k pa is currently entertaining offers of around £100k pa from local retailers.

Turnover rents are certainly becoming more prevalent. We understand that a number of deals like this have been done in the last year. In on case, the operator is paying the landlord a base rent of £60,000 pa but £50,000 of this is to cover the service charge so the net rent receivable by the LL is only £10,000 pa. They will then pay 8% of turnover. Other retailers are offering 6-10% turnover to secure new deals.

Turnover leases provide a challenge for Landlords and valuers as they are very difficult to value in the context of long term returns to a fund. This linked to the fact that leases are getting shorter, means that a ‘prime’ location like North End becomes an increasingly difficult proposition for traditional markets.

More generally, agents concluded that the uncertainty over the future of the town centre and redevelopment of the Whitgift Centre was having a detrimental impact upon lettings of prime space.

VIEWS FROM THE GROUND: SURREY ST, HIGH ST AND GEORGE ST

Rents on Surrey Street are quite low (typically £30-£40K) and therefore appeal to local traders as the rents are more affordable. Rents are falling here but local agents are still receiving enquiries so expects rents to stay close to previous tones, maybe falling by only 10%.

High Street is a similar pitch to Surrey Street with rents historically around £10 psf.

George Street is typically seen as a better location than Surrey/High Street with a smattering of national multiples (Rush Hair, Tesco, Pizza Express, Santander etc) and therefore rents were higher. Rents of c. £60,000 pa were sought for 1,000 sq ft units. This however, was no longer seen as attainable, especially with so much vacancy on the street even before COVID-19.

VIEWS FROM THE GROUND: PURLEY WAY AREA

Outside of the town centre, Purley Way is an important retail centre and a barometer for the performance of out of town retail centres in the town.

In July 2020, John Lewis has announced plans to permanently close its 'At Home' branch on Purley Way. Given the companies retrenchment and previous performance of this store, it is unlikely that they would look to open an alternative store elsewhere in the borough.

On a positive note, one of the major retailers with a store on Purley Way confirmed that turnover in the store for the first two weeks of re-opening was on a par as the same time last year despite the number of customers in the store being much lower due to social distancing. They also said that they would like to get back into the town centre when a suitable unit becomes a available, and at the right rent.

Workspace / office trends

With increasing and persistent retail vacancy in the centre of Croydon, there is suggestion that workspaces and offices could fill some of the voids and support a more diverse town centre offer. This is already happening explicitly elsewhere in London, with House of Fraser seeking to convert the top floors of their Richmond Store into managed workspace[1].

Whilst there may not be the demand for workspace to fill the 40,000sqm of vacant retail space in the town centre, there are recent signs of positive performance in Croydon. It has the 6th highest amount of take up in London over the last 5 years. This has been driven by out migration of companies from central London[2]. It should be noted that this is driven largely by two significant public sector deals, although growing take up in workspaces such as Tmrw Hub and more formal Regus offers, suggests there is interest in Croydon.

Knight Frank[3] suggest that a lack of delivery of Grade A office space has constrained take up in the period 2017-2019, noting a lack of speculative development and a risk aversion towards development in Croydon. They also concluded that the arrival of Westfield has had a limited impact upon the market either positive or negative.

Looking more generally to the future, it is expected that there will be at least a 20% decrease in the demand for the managed workspace in the 'new normal'[4]. In locations like Croydon, Colliers[5] predict that there may be a move to more suburban touch down locations in outer London which support a move towards more home working, whereby employees would work part of their time at a workspace closer to home, taking limited trips into Central London.

Like retail, office leases are likely to become shorter and more flexible, with occupiers able to take advantage of new arrangements which allow companies to expand and contract as they navigate their way through the recession.

In relation to commercial property market's and market demand, the Croydon Employment Land Review (2020) identifies the following key points:

— Overall lack of new office development activity and little market activity for high quality and large offices
— Recent demand for affordable office space: growing demand for Grade B office suits, reflecting demand from SMEs and local businesses looking for more basic and affordable space in central locations.
— Low industrial space vacancy at borough level (1.3%), shortage of industrial space supply and strong demand for industrial space from last-mile logistics hubs.

KEY POINTS

- Workspaces and offices could fill some of the voids in the North End area.
- Positive signs of positive performance in terms of office take-up but lack of delivery of Grade A office space.
- Recent demand for affordable office spaces and future demand for managed workspaces to be expected.
- Strong demand for industrial spaces.
- Office leases are likely to become shorter and more flexible.

1 https://www.egi.co.uk/news/richmonds-house-of-fraser-to-undergo-mixed-use-revamp/
2 https://pdf.euro.savills.co.uk/uk/office-reports/spotlight-croydon-offices---june-2019.pdf
3 https://www.knightfrank.co.uk/commercial/m25-report
4 https://www.bmmagazine.co.uk/in-business/demand-for-uk-flexible-workspace-dropped-20-of-pre-covid-19-levels/
5 https://knowledge-leader.colliers.com/editor/covid-19-recommendations-for-flexible-workspace/

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2.1.2 RETAIL TRENDS & ADAPTATION

Impact of change in trends and behaviour

As e-commerce continues to rise – town centre shopping will need to provide unique experiences and high streets and town centres will need to provide a more diverse offer. Traditional retail parks are uniform and indistinct, and there will be an increased importance on creating a memorable experience in these places.

To achieve this 'experience', successful town and city locations are likely to be multi-use, combining retail with residential and leisure facilities, such as gyms, cinemas and restaurants, which factor in wellbeing and sustainability. This will mitigate the impact of a likely recession and subsequent reduction in retail spending.

For shopping centres, there has been a flight to quality, a trend that was well in motion prior to COVID-19. Shopping centres account for nearly 15% of all retail space in the UK. Whilst only around 300 are classified as "Prime" or "Major Urban", they account for 50% of total shopping centre floorspace.

Secondary and tertiary shopping centres are increasingly struggling to hold on to occupiers as consumer's needs change and long term value is increasingly seen to be in the biggest and highest quality shopping centres. Quality through attractive indoor and outdoor space for rest, childcare facilities and a diverse F&B offer will be important, reflecting the increasingly experience-led demands of the consumer.

The continued rise of e-commerce will increase the value of last mile logistics hubs and other related uses. Amazon has plans to take their market full circle by expanding into physical cashless and cashier free grocery shops, projecting new high value uses for out of town retail.

Shops remain important touchpoints for consumers, but their uses are changing. Whilst e-commerce will continue to increase its market share, bricks and mortar shopping will remain important, evidenced by the fact that, on average, retailers record a 12% increase in online sales in the catchment area after opening a store[17]. Shops will become less about in-store spend and more about building a brand and connecting with consumers; retailers will need to expand their service offer and focus on experience-led retail. This, in turn, will drive demand for higher quality, and in some cases, larger, shop units.

It is likely that the stores of the future will be focused on entertainment, education, and events to encourage awareness and footfall rather than purely sales.

17 GlobalData, 2020

Retail: changes & adaptation

As consumer demand and preferences are shifting, and as new technologies and sustainability pressures impact the environment in which retail operates, the retail sector in itself is experiencing changes. However, this is not the first time retail has changed and adapted. In fact, shopping is continually being reinvented, reformulated and reshaped to keep up with the most subtle change in society. No other sector has seen so many new concepts and new configurations designed to follow shifts in cultural tastes and in social and urban patterns[1].

The inumerable forms that shopping has taken throughout history attest to the way shopping has had to invent new techniques to make itself accessible and appealing to the public. Shopping, rather than being a stable urban building block, is best described in terms of cycles, births and declines.[2]

So what is 'the next big thing?' And what does that mean for providing space for retail?

Experiential and curatorial
As 'chore' shopping moves online, consumers are looking for added value from the physical retail space[3]. For brands, this means creating stimulating in-store experiences by introducing a degree of experimentation or entertainment into the physical retail environment. Digital technology is also transforming the physical, in-store environment[4]. The result is a gradual obfuscation between offline and online channels, and there is a trend towards the greater digitisation of physical spaces in order to create interactive, responsive environment. Virtual and augmented reality offer brands the opportunity to develop immersive multi-sensory services. In the future, physical stores will need to merge better with technology as the distinction between physical and digital continues to diminish[5].

1 Harvard Graduate School of Design & OMA - 'The Harvard Guide to Shoppin'g, 2000
2 Alias
3 The Retail Experience Economy, Retail Economics and Squire Patton Boggs (2017)
4 Future of Retail, ARUP Foresight, 2017
5 Redefining Retail beyond 2020, New West End Company, 2019
6 The Future of Retail Space, Insider Trends, 2019

Smaller format and curated stores
Curation culture is another key trend, especially with younger generations. This includes hyper-local stores and smaller, less cluttered shops featuring a reduced range of goods focused around a specific theme. Consumers are expecting a much higher degree of personalisation. Smaller-format stores are becoming more and more targeted by larger retailers who are seeking to offer a more curated selection of products to targeted segments. With customers prizing convenience and accessibility, large format stores, which require searching for products, are becoming less appealing and this is also being enabled by online channels and 'click and collect' or 'shop and ship' services[6].

New configurations in physical stores
The increased focus on experience means that retailers will dedicate more space to services, showcases and curated events, with reduced merchandise on floors. With the trends towards new forms of payment and checkout-free stores, more valuable floorspace can be given to other uses and functions. Spaces and experiences will also need to be designed for a range of generations as well as for different socio-economic and cultural backgrounds [7].

What does that mean for stakeholders?
The model of retail will need to adapt to shift in consumer needs and behaviour. Building strategic partnerships between retailers, brands, landlords, the public and policy makers is crucial to driving good growth in an era of rapidly changing consumer expectations.

7 The Future of In-Store Shopping, Atos, 2017

What does that mean for physical spaces?
Whether it's Piccadilly Circus, the Whitgift Centre or Westfield in Stratford, the architecture of consumption, and in particular the architecture of shopping, follows the logic of the 'Next Big Thing'. However, and as highlighted in the 'Harvard Guide to Shopping', whilst new shopping buildings always innovate to respond to current trends as well as urban and cultural patterns, they are also 'set to die young. The principle of newness, along with planned obsolescence is the engine'. To keep up with changes and endure, shopping buildings have to adapt and always appear to be new.

This is particularly interesting and relevant when thinking of the future of the North End area and its two shopping centres. 60 years ago, the Whitgift Centre was built as a 'Mini-Manhattan': it was bold, innovative, modern. Evidence suggests that the development was a success for at least 30 years, but the last 30 years have seen the Whitgift Centre slowly declining and loosing its haughtiness.

If shopping is constantly facing crisis and decline, but is also constantly reinvented, refashioned, re-adapted: how can physical spaces allow for flexibility and for this perpetual reinvention, without having to start from scratch every 50 years? How can the future North End area be resilient to retail cycles and allow for innovation? Beyond retail resilience, this also raises questions around economic, social and environmental resilience. Croydon has suffered from the stagnation of its retail sector and, in light of the climate emergency, building a new shopping centre does not seem reasonable.

KEY POINTS

- **Developing flexibility:** to accommodate new store formats like pop-ups or large concept store. There is a need to incorporate greater adaptability in rents, lengths of lease, and store configurations.

- **Connectivity will be king**. New technology infrastructure - such as 5G connectivity - is necessary to provide seamless connection between the physical and the digital, and allow for retail innovation.

- **Importance of place-making: the quality of place as 'anchor'** As retailers compete for footfall, the importance of creating appealing places has never been greater. Retail stores can contribute to richer mixed-use places by achieving a better integration between retail and the wider local environment. In the future, the 'anchor' for town centres is more likely to be the quality of place itself and the experience it offers rather that the shop.


Macy's story in New York curates rotating shopping experiences. The space features different brands and themes every month. © Macy

↑ Farfetch's 'store of the future' includes augmented reality shopping experience and emotion-scanning software. ©Farfetch

↑ House of Vans in Waterloo is a shop, an indoor skate-park, a gallery and a music venue.
© Vans


↑ Korean luxury fashion brand Gentle Monster is proposing immersive in-store installations
© Gentle Monster

↑ WeMRKT is WeWork last concept, a retail space dedicated to selling products made by WeWork members © WeWork
© Vans

↑ Huda Beauty -immersive pop-up in Covent Garden
© Thestorefront

↑ A recreation of a 1980s-style shop in Old Street to promote a Black Mirror's episode in a deal brokered by pop-up retail space agency Appear Here. © FT

2.2.1 BEYOND RETAIL: TOWN CENTRE USES

Looking beyond retail, future uses in the North End area will have to complement existing and future uses that are found in the rest of the town centre. A review of existing uses and Council's priorities has been undertaken to identify gaps in provision as well as opportunities for new or strengthened uses in the North End area.

Community & social

Croydon's increasing population is putting more and more pressure on existing social infrastructures and community facilities. The types of facility provided will need to change and adapt to reflect demographic changes but also to reflect the diverse needs of Croydon's diverse populations.
Croydon Town Centre is one of the country's largest entry points for asylum seekers, and from that derives a responsibility for the town centre to be a welcoming, caring, and supportive place. Finally, the prominence of homelessness and mental health related problems amongst the town centre's residents has been raised as a key issue by the voluntary and community sector (VCS).

VCS organisations in Croydon are made up of diverse range of socially-driven, not-for-profit voluntary and community groups that have a unique role in supporting Croydon's vulnerable populations and the town centre. Currently, they are spread across the town centre and availability of affordable premises and spaced was reported as a key challenge. A number of them are also operating from meanwhile spaces or have a short-term lease[1]. Due to an increased competition for funding and the increased in the number of user, VCS organisations have recently reported the need to develop stronger partnership between each other. The creation of a 'charities' hub', where spaces can be shared and uses co-located, have been suggested by some organisations[2]. Finally, whilst the proportion of Croydon Town Centre's residents in employment is relatively high, increasing skills levels and creating pathways to employment for young people must be a consideration alongside family interventions.

Opportunities
— Provide integrated health and wellbeing facilities following the 'Wellness centre' model;
— Provide lifelong-learning community spaces, combining services for an integrated approach;
— Provide educational and support services, linked with higher education institutions;
— Provide for Croydon's diverse communities.

1 Croydon VCS Strategy 2019-2023
2 Croydon Community Facilities, Interim report (We Made That, 2020)

Cultural & creative uses

Borough-wide, there is a strong emphasis on the growth of cultural and creative industries. Croydon has a rich cultural heritage including a rich musical heritage, being the birthplace of punk and grime, among others. Croydon Metropolitan Centre is one of the Mayor's Creative Enterprise Zones (CEZs) and is working towards becoming a Music City. Croydon's creative sector has also experienced a strong growth over the last five years with a 93% increase in the level of employment[1]. 47% of Croydon's creatives are home-workers.

The town centre is home to key creative and cultural institutions and organisations including performance venues, higher education institutions, and large workspace providers but there is also an array of small-scale and independent cultural spaces and grassroots creative organisations. However, a number of key organisations are operating from meanwhile spaces and will need to secure new spaces in the future.

Recent research and consultation have highlighted the need for more local opportunities to showcase work (profile and retail), promoting culture and creative work through events. The most commonly reported facility gaps are for 'messy' studio/workshop space, mid-size performance venue and recording studios.

Opportunities

— Increase music production space provision
— Provide spaces for showcasing;
— Provide more educational spaces in relation to knowledge economies and creative practices;
— Building on Croydon Art Store's success to provide further flexible creative space with community focus to encourage cultural participation and production;
— Focus on the provision of non-institutional cultural consumption spaces to not compete with Fairfield Cultural Quarter;
— Focus on popular culture/youth culture, diversity and inclusion, encourage cultural participation;
— Build on Croydon Art Stores: participatory visual art and event programmes with a focus on youth engagement and learning.

1 Croydon Creative Enterprise Zone, Evidence Base (We Made That & Hatch Regeneris, 2018)

Leisure & entertainment

Leisure and entertainment uses in the town centre are limited for a town centre of its size. Purley Way retail parks are key competitors in terms of leisure offer, hosting a wide range of uses including sports centres, a bowling alley, a 8-screen multiplex cinema, a trampoline park and casual dining restaurants.

The only entertainment complex in Croydon Metropolitan Centre is Grants of Croydon which provides casual dining and bars, a gym and a small cinema. Outside of small-scale commercial gym facilities, there are no indoor or outdoor sports facilities located in the town centre. Recent research into community facilities in the town centre has also highlighted a lack of spaces 'to hang out', especially for young people and families[1]. Green and open spaces are also limited.

There is a cluster of food and drink establishments to the south of the town centre around South End, with a heady mix of fine-dining restaurants, chains, fast-food outlets, bars, and pubs, forming what has been re-branded the "Croydon Restaurant Quarter".

Opportunities

— Provide spaces for leisure/entertainment 'and consider where multiple uses can be co-located to create 'mini-destinations';
— The critical mass of retail floorspace could allow for the provision space-hungry activities (e.g. bowling alley, climbing, skate-boarding) and an offer which differentiates from the smaller-scale spaces which can be found in the rest of the town centre;
— Provide informal and formal spaces to 'hang out' catering for different generations;
— Expand arts and cultural events and temporary programming to activate the public realm and propose a unique offer;
— Provide for different generations and tastes.

1 Croydon Community Facilities, Interim report (We Made That, 2020)

Evening & night-time

There has been a decline in the size of the ENTE economy (in terms of jobs) since 2001, and Croydon is the only local authority in London which hasn't seen growth in employee jobs in night time industries in recent years[1]. A number of popular and high profile venues have closed since the 1990's, including some pubs and clubs. However, with the reopening of Fairfields Halls and planned opening of a number of live music venue and cultural consumption spaces, Croydon Town Centre is progressively developing a stronger night-time offer. Open since 2016, BoxPark Croydon focuses on dining and drink outlets, but also hosts events such as music performances, kick-boxing and screenings of movies and football matches. There are also successful night time venues of smaller scales, mainly clustered along High Street, in the historical centre.

The North End area is currently not an evening destination, with both shopping centres closing at 6pm, and retailers closing between 5pm and 7pm. However, a recent survey indicates that there is a strong demand for drinking and eating in the evening in the town centre[2]. The survey also highlights that one of the challenges faced by Croydon's evening and night time economy is the perception that Croydon town centre is less safe than elsewhere. Finally, the survey also highlights the lack of venues for live music.

Opportunities
— Create a 24h destination and activate public realm at night;
— Focus on live-music and experiences;
— A new night-time offer for the increased student and young professional population;
— Ensure that interventions are increasing both safety and perceptions of safety.

1 24h London, an evidence base for a 24h city (GLA, 2018)
2 Night time economy survey (LB Croydon, 2017)

Workspace & learning

Croydon's Economic Strategy (2019-2024) sets out a clear vision for the future of Croydon's economy which must be sustainable, fair, dynamic and innovative. For Croydon town centre, that means creating a supportive environment which nurture ideas in an enterprising culture, and enable access to jobs and workspaces. Croydon's growth sectors include creative, digital, innovation and new green technology sectors.

The development of Croydon Creative Campus will support London Southbank University's (LSB) expansion into Croydon, helping to develop more collaboration opportunities between higher education institutions, businesses and local communities. It is expected that this development will incorporate a new R&D lab space in Croydon, including a new Innovation Centre for the energy and bioengineering sector, and a 500sqm Creative Digital Lab space. LSB is also opening a new university campus in Electric House, which will draw 8,000 students in the town centre in 2021. It is believed that the establishment of the university presence in the town centre will lead to the expansion/new implementation of R&D facilities — away from more traditional workspaces — that would aim to stimulate and enable collaborations between business and academia to make and develop market products.

The Employment Land Review (2020) highlighted a lack of space supply with currently no grade A office space available. It has also highlighted a strong demand for affordable workspaces for SMEs and small businesses, including creatives.

Opportunities
— Explore possibilities for the provision of R&D facilities within the North End area;
— Provide affordable workspaces for small businesses and creative including production spaces;
— Provide space for life-long learning and opportunities for skills-building and skills sharing, building on the new University campus at Electric House.

Convenience and support economies

Croydon Town Centre will have to balance carefully its role as a Metropolitan and economic centre, and its role as an increasingly residential area. It will have to provide accessible services in close proximity to the areas it serves, and economic activity and new uses can derive from this increased resident population.

Croydon Town Centre will be home to an increasing number of families. People are also increasingly working from home, and that is a trend that was seen even before the COVID-19 pandemic. This has an impact on the types of use that need to be provided. This can include, for example, ancillary uses and services to support home-workers (e.g. co-working space, printing facilities, concierge services). Further still, the full effects of COVID-19 are not yet known on the mobility of society. How far and how frequently will people be willing to travel? New residential dwellings can build-in amenity space, both within dwellings and communal areas, that can cater for remote working. What other jobs can be provided around this new ancillary economy and the 15-minutes neighbourhood model?

An increased resident population can be hugely beneficial for a place: people often care about their local area and there are clear opportunities to create spaces that allow for self-initiated projects at neighbourhood level. There are already a good amount of third sector organisations and innovative community-run and -led activities happening in the North End area that could be build upon.

Opportunities

- Provide ancillary uses for an increased resident population, including shared amenities, spaces for people to get involved and interact;
- Increase the convenience retail and service offer;
- Promote initiatives that increased circular principles at a neighbourhood level: local production, sharing and renting models, local supply chain through home-worker services;
- Develop a care and maintenance culture through the provision of community-led and delivered spaces and activities.

2.2.2 OVERARCHING TRENDS

Changing expectations & the experience economy

Behaviours, habits and expectations are increasingly orientated towards unique encounters and experiences, as an expression of what people value[1]. The total amount of material consumed in the UK is now falling, as the average person is buying fewer 'things'[2]. There has been a corresponding decline in *ownership* as an aspiration, with 78% of millennials (who make up around 33% of Croydon's population) choosing to spend money on experiences rather than things[3]. Consumer demand is now orientated towards experience and leisure time is a multi-touch point journey.

In addition to this, cities have an increasingly time-poor working population which creates the need and expectation of convenience. Statistics show that reliance on the traditional weekly 'big shop' is diminishing and shoppers are instead making regular, sometimes daily, visits to smaller convenience stores to meet the demands of increasingly busy modern lifestyles[4].There is also a growing concern about provenance of goods, local and ethical sourcing, sustainability and craftsmanship[5]. Post-lockdown, 3 in 5 UK shoppers have expressed their desire to shop more locally in the future[6].

At London level, participation in sport, recreation and culture has increased in the last decade[7]. The changing lifestyles of urban dwellers also bring more demand for town centres to operate 24 hours a day. In Croydon, 64% of the residents visit the town centre in the evening[8], to socialise or take part in culture or fitness activities.

Night-time uses are diversifying. Londoners are drinking alcohol less regularly and there is an increased demand for night time sport facilities, as well entertainment and leisure activities[9].

Looking at trends within the leisure sector, the restaurant sector is a dynamic area of the market today: there is also growth in casual dining, a polarisation towards health-conscious offers, a demand for coffee shops. The health and fitness market has also experienced strong growth in demand in the last years. Concepts such as climbing walls, children's gyms, street and urban sports (eg. skateboarding) are also expanding, while children's play areas and young people activities are becoming more sophisticated with reality/immersive experience (e.g. e-gaming, e-sports).

The North End area has a very limited offer outside of retail, and there are clear opportunities to provide a better mix of uses to create a destination based on increased leisure and entertainment experiences.

The trends analysis suggests that key opportunities are:

- Increasing opportunities for social interaction, cultural and authentic experience;
- Improving public realm, circulations and aesthetics of the town centre to encourage people stopping, sitting, socialising (& spending);
- Support the desire for convenience and local sourcing in the retail offer;
- Promote the town centre as a place for leisure, entertainment and non-retail experience;
- Plan and design for the 24hr economy;
- Support flexibility for meanwhile, nested and ancillary uses.

1 The Deloitte Leisure Consumer, 2019
2 UK Environmental Accounts, How much material is the UK consuming?
3 Millenials: fueling the experience economy, Harris Poll for EventBrite, 2014
4 TRB Future of Retail Bulletin, 2019
5 Ethical Consumer Markets Report 2018
6 Ipsos Mori survey, 2020
7 Taking Part Survey, 2018-2019
8 Talkabout Croydon survey, 2011
9 Talkabout Croydon survey, 2011

Evolving consumer economy & changing retail

Retail shopping is not dead, but its relationship with the consumer is changing. Internet sales are commanding a higher proportion of what is a growing retail market overall[1]. The COVID-19 pandemic have sped up the pre-existing shift to e-commerce and this is predicted to last[2]. A recent survey revealed that two in five (42%) UK consumers will shop online more frequently post-COVID 19 restrictions[3]. However, the pandemic has also accelerated other long-term trends in relation to conscious and local consumption. Another recent survey revealed that 34% of UK consumers indicate that they would pay more for local products and 23% for more ethical products[4].

However, bricks-and-mortar shopping will remain important, evidenced by Etsy's pop-ups or Amazon's bookstores, making clear the importance of physical touch point. From the shops, consumers increasingly want a retail experience that delivers less friction, more interaction, stronger on-line/off-line connectivity, and greater product variety and personalisation than before. Consumers are also increasingly moving away from chain stores, particularly in fashion retail, and towards smaller independent brand. They are looking for an authentic purpose and store's narrative is important.

Technology is allowing brands to deliver more flexible spaces, including bringing more of the online world in-store. Brands are developing innovative solutions to propose immersive experiences to shoppers with the use of VR and AR. Retail spaces are incorporating other uses, such as cafes, or play areas to diversify their offer and increased footfall. For example, the beauty products sector is now providing exclusive in-store services, like makeovers and make-up tutorials, in carefully-designed, enticing spaces. The challenge is for more traditional retailers to invest in innovation in order to evolve and remain interesting to consumers. The challenge is also for shopping centre owners, developers, planners and operators to provide the flexibility needed for these innovations to happen: accommodating new store formats, like pop-ups or concept stores; incorporating greater adaptability in rents, lengths of lease and store configuration, new technology infrastructure such as 5G connectivity along with civic infrastructure with enhanced public spaces.

New technology also allows for logistial innovation and there is a positive vision in which e-commerce is deployed for things that e-commerce is good for, with more coherent shared logistics reducing individual car traffic as a result. In Utrecht, the Dutch post has developed an urban logistics model based on cargo bikes. Couriers are starting to invest in retail spaces: in Amsterdam, DHL has taken a few retail shops which operate as last-mile storage centre[5]. The circular economy also offers a new way of looking at the relationships between markets, customers and our use of resources. It uses innovative new business models and designs, disruptive technologies and reverse logistics to transform the current 'take, make, dispose' economic model[6].

The trends analysis suggests that key opportunities are:

- Allow for flexible lease terms, store configurations, innovation;
- Support co-location of uses, spaces for showcase and temporary uses;
- Improve digital infrastructure;
- Support the installation of retailers with roots in the surrounding area and local communities;
- Design for logistic innovation: micro-distribution centre, click and collect services, e-cargo bikes.

1 Consumer Expenditure and Comparison Goods Floorspace Need in London. GLA, 2017
2 What will post-pandemic shopping patterns look like?, Drapers, 2020
3 ChannelAdvisor & Dynata, 2020
4 EY Future Consumer Index, 2020
5 An immersive retail experience...in a DHL Express post?, FRAME Magazine, 2019
6 Keeping customer connections, The Ellen MacArthur Foundation, 2018

Climate emergency & public health & wellbeing

Croydon declared a climate emergency in 2019 and has the ambition to become carbon-neutral in 2030. This presents considerable challenges for the town centre and ongoing development programmes, which would mean integrating more efficient energy networks, and shifting to zero emission vehicles to reduce CO2 emissions from transport, servicing, and logistics. Future developments should demonstrate how they have been designed to mitigate and adapt to climate change and overheating.

Central Croydon has very good transport links but traffic has remained steady in the past years[1]. This brings related challenges with air and noise pollution and traffic congestion, causing illnesses, and road traffic injuries as well as impacting on wellbeing, as well as making high streets less enjoyable places to spend time. Sustainability is also a growing concern among citizens and shopping habits as consumer look to option clothing and furniture rental as alternatives. UK citizens want to eat more local overall.

Increasing housing intensification, and in particular the increasing provision of co-living and student accommodation also means that there is a need to provide more shared spaces and public amenities for town centre's residents: positive public and civic spaces can create an accessible, attractive and shared part of the town centre.

Design measures are not always singled-out for specific health topics, but are often cross-cutting in nature and, for example, encouraging walking and cycling may be aimed at tackling air pollution and climate change with the added benefit of increasing physical activity. The Natural Capital Accounting report for the borough identifies significant health benefits associated with accessible open spaces[2]. It reveals that where open space access is lacking, there is more of a concentration of the incidence of high levels of COVID-19, Adult Obesity and Clinical depression, as well as incidences of mental health and diabetes diagnoses. In addition to this, the report also highlights the positive outcomes for the economy that can be provided through urban green spaces, including property value uplift and avoided health costs.

1 AADT data, 2019
2 London Borough of Croydon Natural Captial Accounting Report, 2019

The trends analysis suggests that key opportunities are:

- Consider how empty office building can be adapted, refurbished and reused;
- Consider how green spaces in and around the town centre can mitigate the change;
- Connect area to broader green grid — the network of green spaces and blue spaces;
- Expand and enhance the green and blue infrastructure including the number of trees to help reduce urban heat island effects, the uptake of carbon dioxide, improve air quality as well as provide more holistic benefits to streetscape and health and wellbeing;
- Create new productive landscapes and a sustainable circular economy. Interventions like urban agriculture, enhanced public spaces and green and blue grids will improve health and wellbeing, physical activity, greater biodiversity, transformation of underused urban spaces, increased cohesion, and the potential for economic development through learning new skills and exploring commercial options for dealing with surplus produce;
- Set out clear outcomes in relation to biodiversity, and public health, and embed valuation of ecosystem services in a new value model;
- The proximity and critical mass offer by the centre could be optimised to facilitate a culture of mending, ethical trade, exchange, re-use, recycling. The re-use opportunity is key for high streets as not an offer that translates well to the online marketplace;
- Purley Way as distribution hub can be a key asset, and the relationship between consumption and logistic points should be thought;
- Circular principles can be embedded in new developments and initiatives.

Accommodating (good) growth: housing & employment

Town centre living will be expanded and this is reflected by Local Plan policies and rising population projections create challenges for managing growth in that:

— It creates an increased demand for housing which will require innovative supply side solutions;
— It creates a growing labour supply that requires an increase in jobs, and;
— It potentially creates an increase in consumer expenditure that needs to be captured if the Croydon economy is to benefit from this opportunity.

Croydon Town Centre presents one potential source of accommodating this growth. As other town centres, it is undergoing significant restructuring that challenges its 'traditional' role. Major structural factors include:

— Restructuring of retail: Arising from both historic trends — such as continuing pressures for out-of-centre provision — and the growth of new forms of retailing, such as multi-channel shopping which is leading to an increasing polarisation of retail provision, coupled with the qualitative mismatch of historic stock and (remaining) retailer requirements;
— The need to manage surplus office spaces: As there has been a decreased demand for 'back office' functions in Croydon and technology-driven changes in working practices are increasing utilisation of floorspace;
— Uninspiring town centre experience: With its mono-function, the North End is lacking a wider cultural, social, or civic offer that can bring vitality to the centre.

The co-ordinated and proactive re-shaping and intensification of the town centre through residential and employment spaces could offer a potential solution to these challenges, if — and only if — they are accompanied by the provision of a wider mix of uses and the required amount of social infrastructures to support them. It could provide the opportunity to create more desirable places by:

— Enabling high quality housing to help meet Croydon's acute housing need. This would also contribute to town centre vitality, footfall and expenditure . Housing provision should, includes a mix of tenures and affordable homes.
— Creating characterful workspace that is designed to a specification and price to meet the needs of SMEs in an increasing knowledge-based economy.

Overall, employment space can drive day-time footfall. With the proposed housing intensification in town centres and the new communities that are to grow in it, social infrastructures becomes particularly important . In addition, jobs in the retail sector are often seen as low productivity and hence low pay: the claim that a retail-led regeneration will create a high number of good quality jobs is to be future-proofed.

The trends analysis suggests that key opportunities are:

- Encourage mix of uses and flexibility;
- Promote and deliver more diverse uses including those which contribute to social value;
- Protect office space and diversify the town centre away from retail dominance;
- Higher value employment spaces could be incorporated to generate employment and footfall;
- Establish quality social infrastructure and public spaces/parks to support community wellbeing;
- Provide affordable workspaces and spaces for innovation. This can includes lab spaces and makerspaces accommodating business needs for special equipment, and high value technology that can used in a shared mode to make costs sustainable;
- Encourage business network and partnership creation trough R&D space provision;
- Create university-led business incubator spaces to stimulate collaboration between researchers and businesses. These places could act as a catalyst to attract more knowledge intensive businesses in the area.

Valuing green spaces and natural capital

Strategic alignment

Global Vision
"fostering economic growth and development, while ensuring that natural assets continue to provide the resources and environmental services on which our well-being relies. To this, it must catalyse investment and innovation which will underpin sustained growth and give rise to new economic opportunities." (OCDE, 2011)

National Vision
"to be the first Government ever to return the environment in a better condition that it inherited it, over the course of a generation" (Natural Environment White Paper, 2011).

London Vision
"making the city a greener, cleaner and healthier place by targeting London's toxic air, increasing its green cover and making London a zero-carbon city by 2050 with energy efficient buildings, clean transport and energy and increasing recycling" (London Environment Strategy, 2018).

Croydon Vision
"drive rapid reductions in the carbon emissions from activities in the Borough of Croydon, targeting carbon neutral by 2030. Ensure the transition to zero carbon happens in a fair way, providing good quality jobs, improving wellbeing, and reducing inequality." (Croydon Climate Commission, 2020).

The value of urban green spaces

Research into the direct public health and social benefits of urban green spaces has focussed on three main areas- physical activity, mental health and inequalities.

— A national survey in England of people who had moved from areas of more green to areas with less, or vice versa, identified direct changes in their reported well-being[1];
— A national cross-sectional study in the UK found a correlation with people who lived within 500 meters of accessible green space were 24% more likely to meet 30 minutes of physical activity[2];
— Low income areas are associated with lower quality housing and education, poor diet, and less access to good quality green space. Such deprivation is closely linked to poor health. Life expectancy is on average 7 years shorter and they will live more of their lives with disabilities. Health inequalities are halved in greener areas[3].
— DEFRA- has estimated that if everyone had access to sufficient green space the benefits associated with increased physical activity could save the health system £2.1bn per year[4].

1 Public Health England
2 Green Space and Healthm House of Parliament, October 2016
3 Alias
4 Alias

Some methods of urbanisation can damage the environment and have range of implications for human health but there are environmentally sustainable methods that can be taken to mitigate impacts. For example, increasing urban vegetation could help reduce:

— Vegetated surfaces are able to intercept and store water, reducing the volume of rainwater run-off. Flooding-10,000 trees can retain approx. 35 million litres of water per year;
— Noise pollution- a 30 metre-wide border of trees and shrubs can reduce noise levels by 5-10 decibels[5];
— Air pollution- Urban green spaces absorb C02 from the atmosphere. Trees and shrubs have multiple impacts on air quality by removing both particles and gases from the air. [6];
— Urban Heat Island- vegetation creates shade which reduces the risk of heat stroke and exhaustion. Urban green spaces are also are on average around 1 degree cooler, during both the day and night, than built-up regions in the same town.
— Negative impacts on biodiversity. Urban green spaces can act as "wildlife corridors", linking together larger parks, and providing links to rural areas on the outskirts of towns and cities. This facilitates the movement of animals, birds and insects between green spaces and prevents the fragmentation and isolation of wildlife[7].

Urban green spaces can also create economic and financial value:

— Local businesses and property developers benefit from additional green space through job creation, visitor spending, work force retention and house prices- up to 19% uplift in value[7].
— Good quality parks support successful town centres, making them more attractive places to live and work. New York's High Line has generated over $2 billion in new real estate development and will boost the city's tax. revenues by $250 million over a 20-year period[8].
— Finally, urban green space can drive footfall into an area, increasing time spent and retail/leisure spend.

The Croydon Natural Capital Account report (2019) quantifies the economic value of the social, environmental and economic benefits delivered by the borough's green infrastructure assets.

Overall, it has been calculated that:

- the annual value of recreational visits to London Borough of Croydon's green infrastructure assets represents £15 million.
- the annual value of physical health benefits accruing from 'active' visits to Croydon's green infrastructure assets, expressed as avoided health costs represents £7.356 million.
- the value of enhanced air quality that is a consequence of pollutants removed from the air by woodland across Croydon, expressed as avoided health costs, represents £4 million .

In developing the natural capital account, the annual cost of maintaining Croydon's green infrastructure assets has been assessed as £2.575 million.

Overall, the value of assessed benefits accruing from green infrastructure assets is thus 10 times the cost of sustaining these benefits over a sixty-year period.

What does that mean for the North End area?

- Put public spaces. green infrastructure and green recovery at the forefront of North End's revival and growth;
- Develop a productive and circular landscape in the North End area;
- Develop a new value model incorporating natural capital accounting measures and set out clear objectives in terms of tree plantation and provision of green and blue infrastructure.


OUTLET
TEA
COFFEE
COLD DRINKS

3. EMERGING RESPONSES

3.1.1 EMERGING VISION AND PRINCIPLES

Approach

What is Croydon town centre's identity?
Answering this question is not simple. Croydon Town Centre has an identity made of ambiguities and it isn't the first time Croydon has endured such a concentrated period of investment and development. It has been re-imagined from scratch many times, with grand plans for the future, whether that future was the 1890s, the 1960s, 1993 ('Croydon: the future), 2005 ('Croydon Gateway') or now ('Croydon Vision: 2020')[1]. Croydon Town Centre is complex. It is a collage of post-war tower blocks, flyovers, multi-level car parks and medieval and Victorian streets and buildings. It is also an 'edge city', between the central metropolis and the Green Belt. Croydon Town Centre is epically urban, a big and bold 20th Century idea with ancient roots. It is ambitious, and has been shaped by a series of bold moves and radical visions driven by strong confidence.

In his book 'A new kind of bleak: journey through urban britain', Owen Hatherley proposes that it is Croydon's 'accidental uniqueness' that makes the town an inspiring place to many, and has done so historically for several decades. The author says that 'it is precisely the blankness, suffocation and bland commercial inauthenticity of Croydon's cityscape that has inspired artists, musicians and writers to paint an alternative line and colour experience'.[2] In that sense, Croydon is a counter-culture centre.

The North End area inherits from these ambiguities. Planned in the 1960's, the Whigift Centre was initially conceived as one of Croydon Town Centre's key social and civic spaces. As a connective element fully embedded in the urban pattern, the arcades were instrumental in linking the experience of the urban realm with spaces of consumption. Shopping was also a strong component of urbanity. But over the years, the shopping function as an urban connector was lost. As the surrounding fabric of the town centre continued to be disengaged, retail revealed itself as an identifiable autonomous figure. The public realm and amenities are poor and movements are constrained. In and around the North End area, incidents of crime are frequent, highlighting a general lack of community ownership from and within the area. Croydon Town Centre was for example a 'hotspot' during the 2011 London's riots, andperhaps more positively, recent Black Lives Matter's protests.

Croydon Town Centre was an extraordinary place in the 1960's, when Modernist ideas about the future of cities created a high-rise, car-welcoming environment, creating quite a unique urban condition. There are key issues around car infrastructure and biodiversity. Too little attention was given to external amenities compared with road-building, and this will have to change.

What is to be done?
Croydon Town Centre is at a turning point. Once again, the scale of ongoing transformation in Croydon is huge. There are clear opportunities for positive changes and the town centre has the right ingredients. But there are also a number of challenges, and the scale of ongoing transformation is such that redevelopment and planned changes should not be taken lightly. The North End area has a key role to play. Among other things, future changes and additions will have to balance the needs of existing and future residents, celebrate the 'old and the new', fulfil the dual function of a thriving metropolitan centre and an increasingly residential area.

Croydon won't recreate the success of its past by doing what it has done before. It has become clear that enabling the long-term prosperity and sustainability of Croydon Town Centre and the North End area will, in part, be dependent upon taking a new approach to tackling the difficulties that have become evident in recent town centre performance. The revival and development of the North End area presents a key opportunity for the Council and partners to innovate and take a pro-active approach to changes in the context of a climate emergency, increased inequalities and a public health crisis.

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1 Navickas, Katrina - Public Space, Private Land. Croydon, The Alternative Guide to the London Boroughs, Open House, 2020
2 Hatherley, Owen - A new kind of bleak: Journeys through Urban Britain, Verso, 2012

A challenge-driven approach
The most powerful way to shape how regeneration benefits society (the social fabric, the economy, the environment) is to understand and change what it is for. What are we trying to achieve? Why? What are the key challenges to address?

The realities of climate change and the public health crisis, economic and market restructuring, high levels of pollution, as well as economic, social, and racial inequalities and more, won't yield to linear solutions. These problems are 'wicked' in the sense that they are complex, systemic, interconnected and urgent, requiring insights from many perspectives and integrated responses. It is vital that the vision and principles developed for the future of the North End area need to be rooted in broad societal challenges in order to bring coherence and focus to public and private investments, as well as set out a clear direction of travel that is shared and understood by all.

The approach presented in the following pages proposes to situate the framework for the revival and development of the North End area at the intersection of Croydon's existing strengths - social, economic, urban, cultural - and its most pressing societal challenges. By aligning policy frameworks and future interventions around 'Grand challenges' such as climate change, public health, and inequalities, this approach will serve as a 'North Star' to marshal public and private resources to meet these challenges over the medium and long term.

In the future, it is important that Croydon establishes clear outcomes for the future of the North End area. This high-level approach and framework could be picked-up, re-fined and co-developed by the council, partners and local communities in order to establish shared objectives and clear missions for the future of the North End area.

Responding to the 'Grand challenges'

These three multi-faceted, interrelated and broad societal 'Grand challenges' are considered to be the three overarching issues that any change, initiative, or development should seek to address.

TACKLING CLIMATE CHANGE
Climate change is among the most pressing issues of our time. Croydon declared a climate emergency in 2019, and the council is targeting carbon neutrality by 2030. It should be ensured that the transition to zero carbon happens, and happens in a fair way, providing good quality jobs, improving wellbeing, and reducing inequality.

ADDRESSING PUBLIC HEALTH NEEDS
Today's health challenges include an ageing population; unhealthy lifestyles; potential for global pandemics; and the health impacts of climate change and pollution. The revival and growth of the North End area has a pivotal role to play in improving the population's health and wellbeing, and reducing health inequalities. The places where individuals live, work and play, the connections they have with others, and the extent to which they feel able to influence the decisions that affect them — all have a significant impact on heath and wellbeing.

DELIVER EQUITY, DIVERSITY & SOCIAL JUSTICE
The advancement of equality is a matter of human rights and a condition of social justice and inclusion. It should not be seen in isolation. A large number of individuals and communities experience the impacts of continued barriers realted to social and economic class, and lack of access to the wealth of mainstream society. A socially-integrated town centre would be healthier, fairer and safer, and would provide opportunities for generating local cohesion and wealth.

A vision for the North End area

The changing climate, as well as social and economic imperatives, provide a key opportunity to remodel the North End area, making the critical shift from grey to green. Croydon was bold and innovative in the 1960's, but produced a concrete landscape and car-dominated centre that is today proving detrimental for multiple reasons. Croydon Town Centre — and the North End area — can be trailblazers again, by setting out a resilient and restorative vision for their future. This can provide benefits, including:
— Climate resilience;
— Health savings and wellbeing;
— Equity, diversity, and social justice.

The North End area will become a pioneering inclusive, resilient, and unique destination for all, which revives central Croydon's bold and visionary heritage, with innovation and biodiversity at its heart. It will be a highly productive quarter that helps tackle climate change, improves public health and wellbeing, celebrates diversity and fosters social and community cohesion through all stages and parts of its development.

At the core of the vision is ensuring that the North End area provide lasting opportunities for all people to improve their quality of life.

An adaptive and circular approach & a new value model

To address both the 'Grand' and Croydon-specific challenges, as well as deliver on the vision, it is necessary to think differently. In particular, sustainability should no longer be considered as solely an environmental issue, but instead one anchored in new economies to create better places that underpin growth in social equity. The essential value of the natural environment and its role in underpinning economic prosperity, health and wellbeing should be acknowledged. It is thought that circular economies can provide a more dynamic and resilient model that supports new values around sustainability and social welfare.

The adaptive and circular approach puts green infrastructure and biodiversity at the core of the revival of the North End area. Circular economies and initiatives can be embedded within this approach to support new values around sustainability and social welfare.

The development model should also drive and incentivise long-term returns and support the provision of local services and utilities to create environmental and financial resilience. LB Croydon and partners should take a pro-active approach in exploring the growing priority of land value capture and using new value models to better benefit from land value increase and to ensure that future developments capture economic, social and environmental value and are beneficial for the environment as well for existing and future residents, workers, businesses and local organisations.

All land is natural and common capital. Having a sensible and informed strategic plan for land use, allowing for biodiversity and ecosystems as underpinning aims of this, will result in maximum benefits for all and more environmental and social equality. This will have to be complemented by other measures, including wellbeing and health, social capital and wealth.

8 emerging principles to guide North End future

The suggested principles have been developed with a broader view of success in mind and although future commercial viability is important, residents' wellbeing, community cohesion and wealth, resilience and sustainability are seen as equally important. They lay out the foundations for the creation of a resilient and adaptive place for people, one that can continue to support changing patterns of social and economic behaviours, health and wellbeing and access to opportunities

The suggested emerging principles include:

Value principles
Laying out the foundations for a new public vision:
1. Creating a town centre as a public good
2. Serving Croydon's communities

Development principles
Informing future proposals and what would be the North End area about (functions, uses, identity):
3. Step-by-step transformative changes
4. Curating a diversity of uses
5. North End area as a connecting core
6. North End area as an enabling place

Implementation principles
Informing the planning and delivery approach for the revival and development of the North End area:
7. Pioneering an adaptive approach
8. Disruptive delivery arrangements

Each principle is developed in the following pages and includes a set of example and precedents which illustrate how the principles could be translated into actions or initiatives. These are detailed further in the report, starting p.114.

Suggested emerging framework

TACKLING CLIMATE CHANGE

ADDRESSING PUBLIC HEALTH NEEDS

DELIVER FOR MORE EQUITY, DIVERSITY & SOCIAL JUSTICE

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Creating a town centre as a Public Good

Croydon is not functioning well as a retail centre. Even its peers who (by traditional measures) are still not seeing retail success translate into social and economic success. Stratford has annual retail sales of around £2bn, more than four times that of Croydon, but wage growth and overall quality of life for residents have lagged far behind the London average over the last five years. As Croydon plots its future, it makes sense for it to learn from other places and focus on the outcomes it wants for local residents and businesses.

Town centres and high streets are places where people come together, where they hang out and where they talk. To this end, much like a park, they provide a strong public good. In the last two decades, the tendency has been to focus measures of success on footfall, spend and yield. These are good measures of retail success, but in isolation, are not necessarily good measures of a successfully functioning town centre. By focusing upon public value (a balance of social, economic, environmental benefit) alongside commercial reality, Croydon can liberate property and public space to work in a different and more impactful way. This approach can provide a measurable framework to raise expectations of partners and develop the case for innovation in delivery.

Public good should be recognised as a means of creating a destination: what is seen as a successful destination is however not necessarily defined by more economic value and spending.

There is an urgent need for new value models. All land is natural and common capital. Having a sensible, informed strategic plan for land use allowing for biodiversity and ecosystem service,s as underpinning aims of this, will result in maximum benefits for all and more environmental and social equality. This will have to be complemented by other measures, including wellbeing and health, social capital and wealth.

Strategic moves

— Focus upon public value - a balance of social, economic, environmental benefit - alongside commercial reality.
— Implement new value models building on the ambitions of the Growth Programme and the Croydon Natural Capital Accounting report.
— Link public health, equity and climate emergency agendas to a public space agenda.
— Invest strongly in the public realm and make the North End area a ‘public environment’ as a common ground. This should be a key focus at all stages and for all types of development in the area.
— Recognise that good design and public spaces have direct and indirect economic dividends.
— Seek to integrate alternate governance models at different levels (project level, site level).

Potential outcomes

— A sustainable, resilient, healthy and fair town centre, participating in mitigating and addressing today’s societal, economic and environmental challenges.
— The North End area established as a key asset for Croydon’s residents and businesses.
— Local residents involved in decisions and production of space at local level.
— Public sector and local communities as long-term steward of the place.
— A sustainable, resilient, healthy and fair town centre.

KEY PRECEDENTS

Reimagining the Civic Commons - p.117
San Jose, USA
Programme of activity which focuses on better using broad evidence, insights and participatory techniques to support the evolution of places — seeking to balance economic, social and environmental outcomes in parks and downtown areas, with strong evidence and monitoring as the uniting feature of the approach.
This example demonstrates that transformative public spaces can connect people of all backgrounds, cultivate trust and create more resilient communities.

Crosstown Concourse -p.117
Memphis, USA
Mixed-use facility which functions as much as a social space, driving wellbeing, as much as spending, and focusing upon a broader range of outcomes.
Catalyse meaningful social change beyond the building's footprint.

R-Urban - p.118
Colombes, France
Creation of a resilient network based around three prototype production units with complementary urban function bringing citizens emerging projects together and activelyinvolving local people. *Network of spaces in which commoning takes place, sharing the products and resources generated by those activities in "closed-loop" cycles that keep value within the project rather than allowing it to be capitalised upon.*

People Street - p.119
Los Angeles, USA
Community-created and maintained public spaces.
Development of a 'care' culture, purposeful maintenance producing social fabric

Community Wealth Building - p.127
Preston, UK
A new growth model that benefits all.
In an austerity context - local government can play a vital partnership role in fostering cooperatives and a more rooted local economy, not least through innovative procurement policy and a supportive local financial system.

Sheffield Grey to Green Strategy -p.128
Sheffield, UK
An innovative inner-city renewal scheme transforming 1.6 kilometres of road space into a linear green route for pedestrians, cyclists and public transport.
Positive transformational change of the environment of an important inner city area for economic, habitat and wellbeing benefits.

Scottish Land Commission, Land Reuse Framework - p. 129
Guidance providing a framework for identifying the full economic benefits of reusing vacant and derelict land. This means economic benefits in their widest sense, with well-being as the foundation stone of a thriving economy.

2: Serving Croydon’s Communities

The North End area should be a place to live, work, visit and innovate. It should build on a strong community cohesion, and deliver against public health and climate emergency agendas. Its revival, growth and development needs to be accompanied by and derive from a strong public vision around who and what the town centre is for. Croydon’s population is young and diverse. Residents have varying socio-economic backgrounds and needs, and the town centre concentrates some particularly vulnerable groups. In an increasingly dense urban living environment, there is a strong opportunity to enhance quality of life and build community cohesion through an increased focus on public realm and open spaces. Community building and cohesion needs to be supported by spaces and places that value, welcome and celebrate other groups, including young people and older people, minorities, the homeless, and people with disabilities or special needs. VCS organisation can play a key role in the town centre. In addition to this, the climate emergency poses clear challenges for the centre and the North End area’s revival faces a strong adaptation imperative.

If Croydon Town Centre is to be a viable place for people to develop the strong associational and social life fundamental to healthy human existence, it must incorporate a range of public spaces and “third” places, outside of work and home, in which urban citizens can come together.

It will be also imperative to provide for Croydon’s diverse communities and a variety of tastes in order to deliver cultural equity.

Strategic moves

— Link public health and climate emergency agendas to a public space agenda, and adopt a long term vision for intergenerational, social and economic equity.
— Address the zero-carbon and cultural agenda through North End’s area transformation.
— Provide for community infrastructure, which not only involves provision of life-stage specific services and facilities in their own right, but also supporting the social networks that make these facilities work.
— Encourage co-located multi-generational uses;
— Support uses that express a variety of tastes and interests, including popular culture. Ensure that all groups can see their own aspirations reflected in the town centre’s public spaces.
— Local services and support economies that encourage residents to adopt healthy modes of living and provide spaces for wellbeing, health services and sports.
— Increase green and blue infrastructure.
— Provide spaces for local production and circular economy initiatives; facilitate the culture of mending, ethical trade, exchange and re-use.
— Bring in a mix and different forms of housing models (eg. co-op).
— Promote better use of local character and identity as the foundation for new development: what the priorities for the community are, and how the centre functions socially, economically, environmentally and culturally at micro/street/block level.

Potential outcomes

— Creation of a shared public vision for the North End area.
— Delivery of a variety of public realm and open spaces that support healthy lifestyles and inclusive communities.
— Croydon’s VSC organisations supported and secured within the town centre.
— Croydon’s diverse population needs and ambitions supported, and empowered residents
— Affordable and suitable housing for all.
— Added value and destination for all uses through improved high quality public infrastructure.

KEY PRECEDENTS

15 minutes city - p.120
Paris, France
Improving living conditions and the environment by ensuring all urban necessities are within a 15-minute reach on foot or by bike.
Combining metropolitan and local neighbourhood functions.

Game Streetmekka - p.121
Viborg, Denmark (JAJA Architects)
Hub for street sports and youth culture, informal meeting areas, re-use of existing building for a limited budget.
Indoor-outdoor public and leisure spaces dedicated to urban sports and community uses.

Wild West End - p.122
London, UK
Public realm scheme to create improved connections with nature and preserve/create wildlife.
Positive impact of urban green infrastructure with clear measurement strategies in place.

Sheffield Peace Gardens - p.122
Sheffield, UK (Richard Watts)
Successful and heavily used innercity network of gardens.
Introduction of new water ecologies and environments into the City Centre.

Nature Urbaine - p.123
Paris, France (Valode & Pistre)
150,000sq.ft rooftop farm located in the center of Paris with the goal of connecting the residents with the farming industry, developing the growth of local agriculture as well as healthier lifestyle. Over 100 farm plots available to rents.
Productive landscape combining innovation/ research, education and leisure uses on rooftop.

Schieblock rooftop farm - p.124
Rotterdam, Netherlands (ZUS)
1000 m2 rooftop-farm and testsite for smart water-storage and management.
Prototype for sustainable development including productive and educational farms.

Ron Finley project - p.125
Los Angeles, USA
Community and minority-led productive garden serving as an educational and community space.
Community and minority-led productive gardens with strong community leadership.

Co-op City - p.126
Zurich, Switzerland
Stable and resilient co-operative housing model: co-owned, co-produced, co-shared.

3: Step-by-step Transformative Change

Large redevelopment can take time, and the redevelopment of the Whitgift Centre is a case in point. The current crisis due to the COVID-19 pandemic illustrates that economies can be subject to brutal changes. Social and technological conditions are also certain to change.

Taking a phased approach to the area's revival will allow for greater flexibility and fluidity, as well as for a more organic and resilient transformation of the North End area. Developing a coherent and cohesive phased strategy, building on long-lasting objectives & clear outcomes capable of accommodating changes will overcome issues of stasis and decline that have characterised the town centre in recent years. A phased strategy can also advocate for re-use and adaptation of existing buildings, allowing for a more flexible approach to testing and innovation. Retrofitting existing buildings or structures would help in preserving and strengtening Croydon's heritage and identity, as well as allowing for planning and building around them in sustainable way.

Strategic moves

— Provide options to phase development and/ or adjust the balance of land uses over time, according to market demand, and also according to immediate priorities and long-term objectives.
— Heighten focus on place-making and public and early implementation of public realm.
— Create opportunities for temporary and small-scale projects allowing a 'test and learn' approach to new ideas and concepts.
— Support a mixture of refurbishment/ retrofit and new development through the policy framework and direct intervention. Refurbishment can still be truly transformative.
— Allow for space to be 'open for interpretation/ incomplete, un-perfect.
— Key spatial parameters:
  - Setting a framework for key routes, permeability and network of multi-level public spaces;
  - Specifying upper/lower floorspace limits for each use, including uses on terraces;
  - Defining minimum/maximum building heights in various areas and zones to establish density and scale, and;
  - Identifying existing features to be retained and areas to be kept open/free from built development. Remove of parts of the Whitgift roof where possible to enable unlocking the area.

Potential outcomes

— 'Unblocking' of development activity in the area through acceptance of a step-by-step approach.
— Phased development programme designed to react to funding opportunities and market movements, and guided by clear objectives and outcomes established by a new value framework;
— High quality and accessible public open spaces and public realm resulting in well-used spaces and participating to place activation.
— A strong and distinctive identity for the North End area: in its physical form, the area can be un-perfect, 'rough and ready' but also innovative, evolutive, inclusive, adaptable.

KEY PRECEDENTS

Kings Cross - p.130
London, UK (Argent)
Phased regeneration with significant emphasis on activation from the very first phase of the development, starting with the delivery of public realm and the provision of space for diverse range of uses from major events to community groups meet-ups, art installation, and creative meanwhile uses.
Activation & 'Public realm first' approach.

Buiksloterham - p.131
Amsterdam, Netherlands (Studioninedots)
Phased masterplan for the redevelopment of a large industrial estate.
'Live and dynamic' masterplan: flexible approach to planning to enable mixed-use and organic development.

Matadero Madrid - p.132
Madrid, Spain
Contemporary arts and community space
Phased and incremental renovation of abandoned buildings and public areas belonging to Madrid's historical heritage.

Tainan Spring - p.133
Tainan, Taiwan (MVRDV)
Shopping precinct retrofit to provide beneficial public space.
Original structure kept, environmental benefits and value uplift anticipated.

4: Curate a Diversity of Uses

Evidence strongly suggests an over-provision of retail floorspace and 'retail-led' is no longer the appropriate descriptor for the revival of the North End area.

In order to be resilient and successful, the North End area will have to strike a careful balance between meeting local needs and attracting and serving expanded and new communities, workers and visitors. Accommodating a more diverse and denser mix of uses will help to ensure its future resilience, while accommodating sustainable and inclusive growth in the town centre. It will also generate lasting economic and social value and avoid dependency on particular sectors. New uses in the North End area will have to complement the wider town centre's existing and forthcoming uses. Retail has a role to play in this configuration, but perhaps more as 'service' and as part of a blend of activities rather than as the core function.

Residential housing also has a key role to play in the future of the North End area. The area should provide a mix of tenures and housing types, including affordable housing and housing suitable for families, in order to cater for local needs but also create a truly diverse neighbourhood. Biodiversity and circular principles should be at the heart of all uses.

Strategic moves

— Realise the potential of incorporating new uses to strengthen the centre and ensure it meets the needs of existing and future residents and businesses.
— Create a hub for leisure and recreation (including space-hungry activities) which are accessible and relevant to people of all ages and disabilities, as well as all economic and cultural backgrounds. Consider relocating leisure uses from the Purley Way in the town centre. Youth oriented activities should also be a key focus.
— Integrate a blend of uses which allow for day and night time activities.
— Provide spaces for showcasing, events, and temporary occupations.
— Build on the success of Croydon Art Store and ambitions for Trinity Court to be a cultural hub, provide accessible art and creative spaces, including production spaces.
— Use opportunity given by the new London South Bank campus in Electric House to drive a knowledge-led economy in the town centre, capitalising on other higher education and key institutions present in the town centre.
— Integrate a mix of housing types and tenures.
— Integrate retail pop-ups, temporary and short term usage of space, requiring more central ownership and a more curated approach to spaces and uses.

Potential outcomes:

— A lively and diverse 24h hour town centre & local neighbourhood, catering for Croydon town centre's diverse population and attracting visitors.
— A town centre economy which does not rely on a particular sector.
— A renewed retail offer.
— A mix of uses which cater for different age groups and different communities, with a specific focus on young people and families.
— A town centre that encourages healthy lifestyles and local resident to test, innovate and learn.

KEY PRECEDENTS

The Forum - p.134
Groningen, Netherlands (NL Architects)
An experiential 'cultural department store' to replace the city centre shopping precinct, including a wide range of civic, leisure and cultural uses and new public spaces.
A new flagship civic space for the centre.

Oodi Central Library - p.135
Helsinki, Finland (ALA Architects)
Public sector delivered civic building and library with the vast majority of space dedicated to public amenities including a cinema, cafe/restaurants, recording studios, makerspace, and exhibition/event space.
Ground floor as an extension of the plaza with a covered space that can be used for outdoor events.

Walworth Town Hall - p.136
London, UK (Feix&Merlin)
Mixed use commercial, cultural and community space bringing a derelict heritage asset back into use.
Partnership approach reduces risk and cost to public sector. Innovative mix of uses. Partner selected through competitive process.

Bikinihaus - p.137
Berlin, Germany (UAU Collectiv)
Re-purposed wholesale building into a concept mall including curated independent boutiques, concepts shops, restaurant/bars as well as space for pop-up exhibitions and retail showcasing.
Large focus on exhibition/retail showcase.

LocHal - p.138
Tilburg, Netherlands (CIVIC Architects)
An urban living room in a former locomotive shed. *Entrance hall is conceived as a covered city square.*

Ballston Quarter - p.139
Arlington, USA
Refurbishment of shopping mall to provide a food hall, including brick-and-mortar versions of mobile kitchens from around the area and pop-up/incubator retail spaces.

Central Parade - p.140
London, UK (Gort Scott)
Multidisciplinary, mixed use space for creative industries including a café, retail units, and spaces for start-ups.
Key community and cultural hub in a town centre, driving footfall and supporting entrepreneurship.

Croydon Arts Store - p.141
London, UK (LB Croydon)
Art venue and creative workspaces in re-purpose retail units.
Innovative approach to test new uses within shopping centre.

The Plaza - p.142
Santa Monica, USA (OMA)
Mixed use development that encompasses civic plaza, cultural venue, retail, residences, offices in the heart of downtown Santa Monica.
Large scale mixed-used building incorporating outdoor programming space.

The Commons' - p.143
Bangkok, Thailand (Dpt of Architecture)
Retail-led development with strong focus on public spaces.
Active outdoor-indoor public space.

Off-White Store - p.144
Miami, USA (AMO & Virgil Abloh)
Flexible store designed to host a variety of activities like art and music events, and talks.
Physical transformation of retail space to provide for activities beyond retail trade.

5: North End area as a Connecting Core

The North End area is located at the heart of Croydon Town Centre. It is surrounded by five masterplan areas, all of which have specific identities and functions.

The North End area should 'stitch' together Central Croydon and provide uses and routes that connect to all surrounding masterplan areas, acting as the 'connector' for the town centre. More broadly, the North End area is part of the historic North-South artery connecting to central London and south of London which should be celebrated.

Culture and arts have also a key role to play in linking places together through outdoor programming and public arts. New uses in the North End area should also be considered in relation to other parts of the town centre. They should seek to compliment neighbouring uses and seek partnerships and collaborations with institutions, businesses and local communities

Strategic moves

— Connect Croydon back together by improving permeability through new and improved 24h east/west and north/south routes, and enhancing the streets and roads within and surrounding North End.
— Improve connectivity by creating pedestrian and cycle priority links, build an interconnected network of streets, squares and public open spaces providing the maximum freedom of movement and choice of direct routes to all destinations.
— Ensure that improvements to streets take account of their role as social spaces, not just their role as an efficient means of pedestrian and cycling movements, and distribution.
— Create better gateways and arrival points, providing a clear indication of the quality of environment they lead into.
— Revive successful arcades and street patterns and integrate new public spaces to enhance the North End area's historic characteristic built form and public realm networkmix of built form and public access patterns
— Promote 24h public access.

Potential outcomes

— Improved access from East Croydon and West Croydon stations to North End and Old Town, improving footfall and activation.
— Unlock development opportunities within deep urban blocks that may come forward. incrementally if independent access is possible.
— Improve the North End area' sense of place with improved frontages, public realm and pedestrian routes.

KEY PRECEDENTS

Luchtsingel -p.122
Rotterdam, Netherlands (ZUS)
'Quick-win' crowd-funded pedestrian bridge that runs across roads and railways, to connect three previously disconnected areas of the city centre.
Re-use of existing structures to mend existing severances

The Bentway, Gardiner Expressway - p.145
Toronto, Canada (Public Work)
Transformation of 1,75km space beneath the expressway into a vital artery for pedestrian and cyclist knitting together seven downtown neighbourhood.
Re-use of existing structures to support new forms of public life.

Seoullo/Skygarden -p.146
Seoul, South Korea (MVRDV)
Multi level network of parks and gardens with integrated, retro-fitted kiosks and pavilions with bespoke retail, food and drink, and public services.
Integration of biodiversity to a strictly urban condition & a park as a connecting destination

6: The North End area as an Enabling Place

The office property market in Croydon has been subject to difficult conditions in the past decades. Whilst evidence suggest that workspaces and office spaces could fill some of the vacant spaces and support a more diverse town centre, providing the right type and at the right price will be crucial.

Croydon has the ambition to become a place for lifelong learning, tapping into the increasingly important knowledge economy, but also ensuring that Croydon remains a city able to sustainably deliver growth as needs change. Located at the heart of the town centre and surrounded by prime-office spaces and the future Creative Campus, the North End area will need to differentiate itself and provide uses which complement the rest of the town centre. Initiatives such as the Creative Campus and SLKE programme can stimulate and support the growth of knowledge intensive industries in the town centre. Changes will need to mission-driven and provide inclusive and economic opportunities and access to quality jobs to new residents and existing communities, as well as generate revenues.

Future spaces and uses should build upon the Council's ambitions to establish Croydon Town Centre as a Knowledge Transfer Corridor and global centre for higher education. Building on the new university campus at Electric House, the North End area could be become a place where residents and workers access information and knowledge, explore new ideas and new solutions, as well as leverage resources and explore new and innovative ways to develop, test, and launch projects that are carefully curated and mission-aligned.

Strategic moves

— Provide for knowledge-based infrastructure (both physical and digital) building on Croydon Creative Campus and SLKE programme. Focus on creative, digital, innovation and new green technology sectors.
— Provide affordable and flexible workspace. Consider the development an affordable workspace policy and guidance to support negotiations with developers or landowners and provide the right type of space.
— Work in partnership with existing higher education institutions to deliver R&D spaces and retail innovation test-beds.
— Focus on vocational schools and training as well as apprenticeships.
— Use cooperative capital as a strategic vehicle to facilitate collective investment.
— Embrace innovative asset management and acquisition, including property purchase, new place-specific non-commercial KPIs and residential intensification.
— Explore and support alternative commercial models including social enterprises and co-operative models that have a solid business base but that also materially benefit residents and their communities.
— Build momentum and buzz with a phased approach and meanwhile use.

Potential outcomes

— Croydon's existing and future residents have access to skills and employment opportunities.
— A range of affordable workspaces options are supporting Croydon's growth sectors.
— An innovative town centre where ideas, creative and autonomous thinking is nurtured through collaboration with communities, businesses and higher education institutions.
— Circular economy principles embedded through collaboration across supply chains and between businesses, research and community organisations.
— Croydon established as a knowledge transfer corridor and centre for higher education.

KEY PRECEDENTS

Brooklyn Navy Yard - p.147
New York, USA
Centre of manufacturing and workforce innovation located across 300-acres along Brooklyn's waterfront and managed by a not-for-profit corporation serving as the real estate developer and property manager.
Collaborative tech hub dedicated to entrepreneurs working on scalable technologies and products

The Department Store -p.148
London, UK (Marvel Architects)
Former Edwardian department store re-imagined to create a series of collaborative workspaces supported by an evolving hub of creative, retail and community uses.
Office workspaces celebrate the process of craft and making

Liverpool Media Academy - p.149
Liverpool, UK
Plans to turn the upper floors of the shopping centre Metquarter into a media and arts-focused college.
Embedding educational uses within re-purposed retail units

Atlanta innovation district - p.150
Atlanta, USA
Research-oriented anchor institutions, public sector, high- growth firms, and tech/creative startups embedded within a growing, amenity-rich residential and commercial environment.
Focus given to international investments and spin-out from Georgia Tech along with strong placemaking approach

Melbourne Innovation Districts
Melbourne, Australia
The City of Melbourne has partnered with two inner city adjacent universities and dedicated a zone to innovation. MID connects researchers, industry and the community, through a public realm, social innovation, enterprise, institutional design, and digitally-enable tech programmes.

7

7: Pioneer an Adaptive Approach

Patterns in retail behaviours are changing rapidly, as are retail and development markets more widely. Funding mechanisms and underlying approaches to valuation are in flux, and in mid-2020 we are approaching a significant economic recession - the extent of which is yet to be seen.

The planning policy process is poorly equipped to deal with this pace of change. What seems almost certain is that predictions and guidance given now are unlikely to play out accurately across the next decade. For this reason, an adaptive an nimble policy approach is advocated for the North End area.

Additional details can be found starting p106.

Strategic Moves

— The Croydon Local Plan review should set out high-level desired outcomes for the North End area to reflect changes since the 2013 OAPF as well as embed the vision and principles in the Local Plan to give them weight.
— Further to Local Plan policies, a more frequently reviewed set of guidance - say annually - should monitor and respond to changes in the area.
— Set out performance monitoring metrics that will be used to judge progress and trigger adjustments, (e.g. land value, new green space hectares, number of new trees, social integration ans wellbeing, new homes).
— Set out a bespoke process-based approach and delivery strategy.

Potential Outcomes

— Development controlled and steered through a reflexive and adapting mechanism that can keep pace with change on-the-ground and at a macro-economic level.

KEY PRECEDENTS

High Street Adaptive Strategies
Greater London Authority, 2020
The study explores strategies for innovative responses to the challenges found on high streets based on a range of case studies from across London. It also sets out the process and principles for undertaking an adaptive strategy as an iterative, interactive process, characterised by adaptable planning, early adoption, continuous improvement and flexible responses.

https://www.london.gov.uk/sites/default/files/ggbd_high_streets_adaptive_strategies_web_compressed_0.pdf

8: Disruptive Delivery Arrangements

Evidence from agents in Croydon and the industry more generally suggests a substantial devaluation of retail rents and property over the last 12-18 months (as much as 60% reduction), something which has be expedited by COVID 19. It is highly unlikely that traditional financial models will support the planned transformation and the current delays to development are likely to limit investment into Croydon centre from retailers and investors. In short, without new approaches, it is unlikely that Croydon centre will be able to improve without rethinking projects and how they are delivered.

If Croydon is to secure delivery of transformative projects in the short to medium term, it will require the intervention of the public sector and new ways of organising to support delivery. New projects need to be different, probably more human in scale, and certainly more aware of the social and environment impacts they deliver. Anything from temporary use of empty spaces, to acquisition of land and buildings can be achieved through locally-led delivery bodies such as cooperatives or community owned property companies – but none of this can be achieved without initial, significant investment from the public sector.

New activity will require new solutions. Municipal or Social Impact Bonds, are all worthy of consideration as Croydon seeks to plot a different course.

Additional details can be found starting p106.

Strategic moves

— Better coordinate temporary use of empty or underused spaces to test uses, innovate and embed activities incrementally . Develop the case for private sector involvement in this.
— Identify key sites and buildings for acquisition (lease or freehold) or investment from the public sectors.
— Develop public sector strategy for leadership, setting out the foundations for alternative investment models.
— Build long term capacity of civil society organisation to taken on 'ownership'
— Support transfer of spaces, including residential, through local bodies such as cooperatives or community owned property companies.

Potential outcomes

— More control over the long term future of North End and Croydon.
— Enhanced social outcomes and satisfaction.
— Greater responsiveness to challenges of recession.

KEY PRECEDENTS

Renew Newcastle - p.151
Newcastle, UK
Programme connecting people with vacant spaces, supporting a community of creative entrepreneurs who bring life, interest and activity into under-utilised neighbourhoods.
Supporting meanwhile uses and entrepreneurships

Detroit Municipal Bonds
Detroit, USA
Detroit has funded a significant proportion of its downtown improvement through the issues of Municipal Recovery Bonds. These over investors a return on their investment based on future revenues secured by the city. $135m has been raised and used to fund redevelopment and renaissance of building as well as providing additional investment into policing and public services.
In the UK, Tfl raised a Green Bonds to support additional investment in low carbon travel including cycle support highways and hydrogen buses.

Plateau Urbain - p.152
Paris, France
Temporary use real estate cooperative, which creates ecosystems of work by reactivating empty sites into ateliers, makerspaces and co-working spaces for charities, entrepreneurs and artists.
Effective strategy for community engagement and positive impact on the wider area.

3.1.2 ILLUSTRATIVE VISION

Illustrative vision

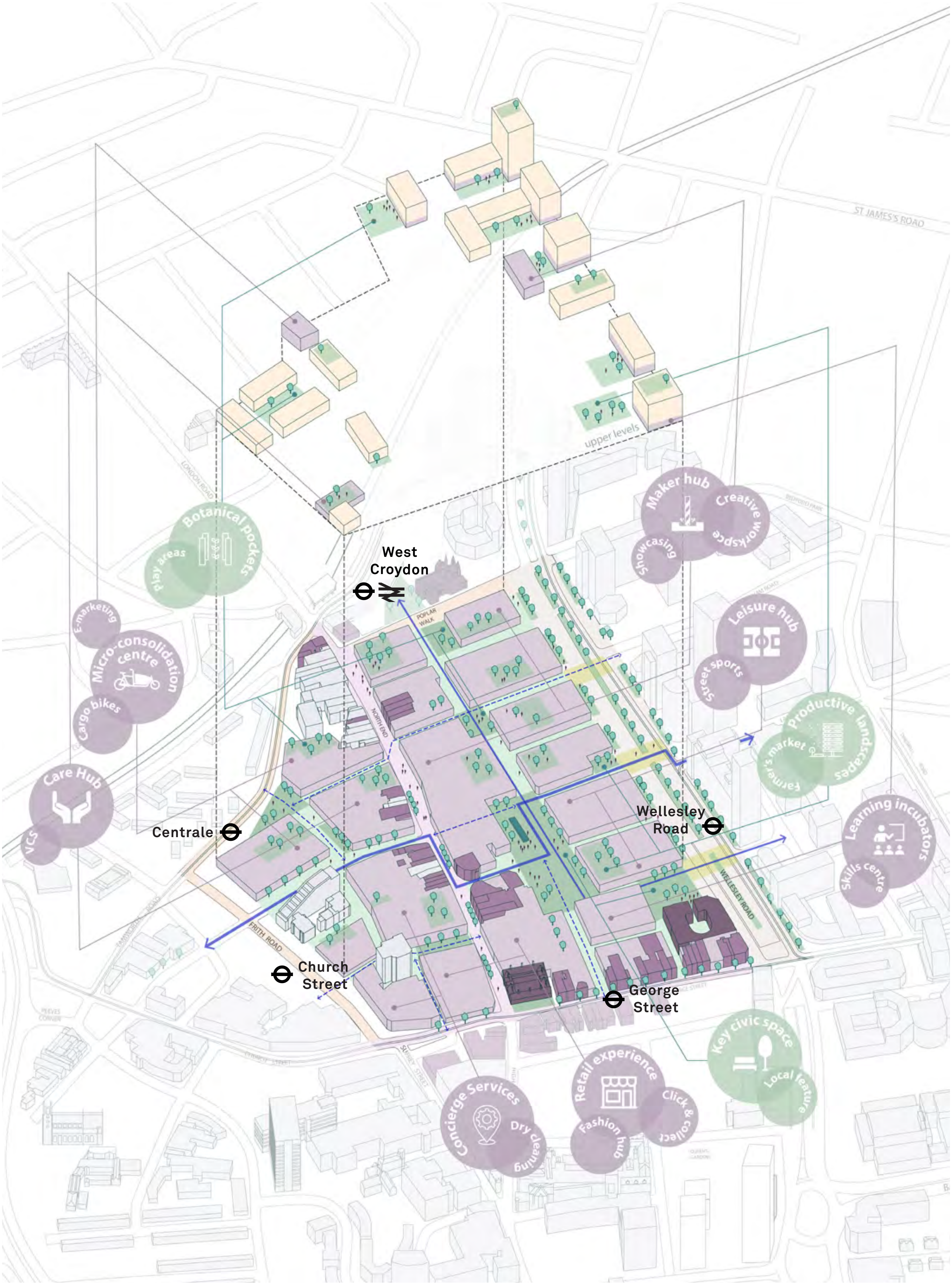
The adjacent diagram should not be read as a prescriptive diagram but intends to illustrate the overarching spatial vision for the area: a mixed-use public destination for all with an inclusive and accessible physical network of streets, public, celebrated heritage and a unique local character with an exemplary green, blue and digital infrastructure and sustainable transport.

The area will be home of to a diverse mix of uses to cater for the needs of a diverse resident population, workers and visitors, along with residential housing. 'Mixed-use' will characterise the whole area, but also individual streets and blocks, horizontally and vertically. The area will host public amenities at different levels, including on podiums and rooftops.

Biodiversity will be at the heart of the North End area with productive and restorative landscapes provided along circulation routes, within new public spaces and pocket parks, and at uppers levels.

KEY

- Main new public access east/west route (24 hr)
- New and improved secondary routes
- Potential new routes
- Key open space
- Publicly accessible rooftops & residential amenity space
- Public space improvements - inner paths
- Potential pedestrian crossings/subways improvements
- New local feature
- Indicative plot sub-division / ground floor podium
- Indicative residential buildings on upper floors
- Frith Road and Poplar Walk improvements
- High Street enhancements
- Wellesley Road improvements
- Listed buildings
- Locally listed buildings


upper levels
Botanical pockets
Play areas
E-marketing
Micro-consolidation centre
Cargo bikes
Care Hub
VCS
Maker hub
Creative workspace
Showcasing
Leisure hub
Street sports
Productive landscapes
Farmer's market
Learning incubators
Skills centre
Key civic space
Local feature
Retail experience
Click & collect
Fashion hub
Concierge Services
Dry cleaning
West Croydon
Centrale
Wellesley Road
Church Street
George Street
ST JAMES'S ROAD
POPLAR WALK
NORTH END
WELLESLEY ROAD
FRITH ROAD
LONDON ROAD

3.1.3 SPATIAL PRINCIPLES

Overview

As set out in the suggested vision and principles, it is envisaged that the North End area will be transformed into an attractive, robust, accessible and inclusive public destination. Many of the outcomes expected in relation to public realm and connectivity set out in the OAPF are relevant today, and the following emerging spatial principles build on that, whilst setting out objectives to enhance biodiversity, local character, heritage assets and elevate quality and identity of the built environment. The five overarching spatial principles for delivering the vision are as follows:

Connectivity
Permeability, accessibility and movement - including vertical movement - will be improved by introducing new 24 hour routes, cycling, pedestrian smart and digital infrastructure, as well as a joined-up servicing and delivery access strategy. Reducing severance caused by Wellesley Road will be key.

Public realm
The public realm will be conceived and used as a social and civic space, providing opportunities and amenity for public life at different levels, as well as a new anchor public space and a network of pocket parks and squares. Green and blue infrastructure will be provided to create a productive and biodiverse landscape.

Mix of uses
The area will provide uses that attract people 24 hours a day and willl include a mix of retail, leisure, community, cultural and workspace uses, as well as integrate productive landscapes and circular uses and initiatives. Uses will cater for diverse demographics and needs.

Frontages
Ground floor uses will be considered as an extension of the public realm to ensure they complement and support existing and forthcoming facilities and activities, create active frontages and attract people 24 hours a day. Design and quality will be exemplary and enhance the setting of the Central Croydon Conservation Area.

Phasing
The phasing of the North End area's transformation will be based around a long-term, holistic plan and vision. Early interventions in the public realm, including removing parts of the Whitgift Centre's roof, along with precursors and interim uses will be important to unlocking the revival of the area and improve perceptions.

These principles are further detailed in the following pages.

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Connectivity & Public realm

The existing site has a complex urban pattern that is difficult to use and comprehend. There is no clear hierarchy to guide movements and links to the centre provided from east to west and north to south are neither attractive or direct. There is a clear opportunity to break up what is currently a large and unpermeable urban block, increasing accessibility, legibility and walking and cycling movements.

The adjacent diagram presents the proposed spatial principles for the redevelopment of the site. It is thought that early interventions in the public realm will be key in unlocking regeneration opportunities and investments. Given the phased approach, public realm interventions should follow the existing footprints and street/arcades patterns should be retained. Removing the Whitgift roof structure could be a priority in order to open up the block.

As the North End area lies in the most accessible location in the borough, any transformation should be based around creating a car-free quarter to reduce the carbon footprint of development, and to improve air quality in the town centre.

Building on the Croydon Natural Capital accounting work and a strong 'From grey to green' vision, biodiversity should be at the heart of every development or initiative. The area should include a network of biodiverse and restorative green and blue landscapes which link to the wider green grid.

The adjacent diagram is showing key principles in relation to connectivity and public realm at ground floor level. However, upper levels should be considered for activation and vertical movements should be improved.

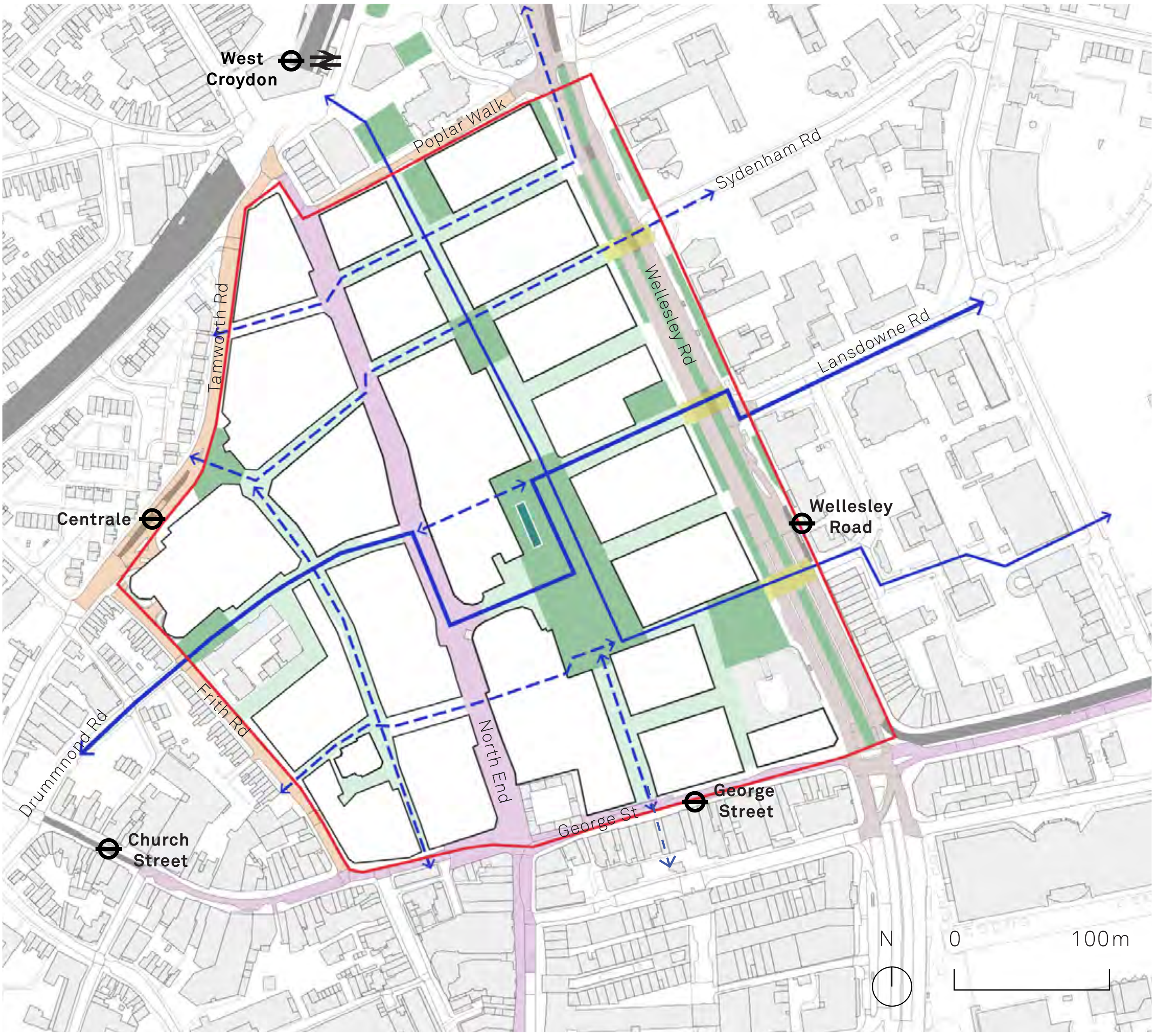
Connectivity

— Provide a high quality 24 hour publicly accessible east/west route from Wellesley Road to Old Town and north/south route from Poplar Walk to George Street as well as legible entry points
— Provide a network of improved east/west and north/ south routes.
— Increase permeability across the core area by introducing secondary routes.
— Provide a joined up servicing and delivery access exploring sustainable and innovative servicing modes
— Embed smart city and digital infrastructure within the built environment.
— Reduce severance caused by Wellesley Road
— Deliver pedestrian and cycling crossings/ subways connection improvements with adjacent areas.
— Improve vertical movement and public accessibility to higher levels of developments as well as indoor public spaces.
— Improve vertical movement and accessibility to higher levels.

Public realm

— Provide key open public space/square at the 'heart' of Whitgift Shopping centre.
— Remove specific parts of the roof at key areas to create high quality open space.
— Increase green space amenity and high quality public open spaces along proposed routes.
— Increase network of green space amenity and blue infrastructures, provide for productive landscapes and urban agriculture and increased biodiversity
— Design the public realm as a social and civic space. Ensure that the public realm provide inclusive public facilities for all, catering to diverse demographics and communities, and including opportunities for play and gathering.
— Enhance the streets and roads within and surrounding the Retail core area as well as internal routes
— Create opportunities and amenity for public life at different levels (i.e upper levels, rooftops).

Ground floor plan



KEY

- Main new public access east/west route (24 hr)
- New and improved secondary routes
- Potential new routes
- Key open space
- Public space improvements - inner paths
- Potential pedestrian crossings/subways improvements
- New local feature
- Frith Road and Poplar Walk improvements
- High Street enhancements
- Wellesley Road improvements
- Listed buildings
- Locally listed buildings
- Indicative plots
- Study area boundary

Uses & frontages

The key to the success of the revival and development of the area will be a vibrant, diverse mix of uses anchored within and around the new town centre. This mix should include some retail, workspaces and residential uses which will complement and support existing and forthcoming facilities to create a new mixed-use commercial heart for the wider area, attracting people throughout the day and evening and creating a vibrant new destination. The mix of uses should be provided not only within urban blocks but also within individual buildings, at street and upper floor levels (eg. rooftops, podiums).

Uses

— Create a vibrant multi-use new retail/leisure/community offer in line with the COA's designation as a Metropolitan Centre.
— Provide other uses including workspace, health care and ancillary spaces internally.
— Provide uses that cater for diverse demographics, communities and needs.
— Provide transport related uses closer to West Croydon station (London commuters).
— Provide gateway/anchor uses along the proposed entrances.
— Provide a mix of ground floor uses, sizes and tenures to meet current and future needs
— Provide larger scale footprints for space-hungry activities closer to Wellesley Road.
— Locate tall buildings closest to Wellesley Road away from the most sensitive locations in terms of privacy, heritage assets security and overshadowing.

Frontages

— Enhance uses that can provide active frontages along high streets and open squares.
— Proper location of tall buildings to avoid creating canyons where poor air quality can get trapped.
— Reduce height in response to sensitive locations and heritage assets.
— Ensure that active frontages are provided along Wellesley Road.
— Ground floor uses should be considered as an extension of the public realm; permeable, active and physically designed to enhance the public realm.

More private uses		**More public facing uses**
Residential Student accommodation Residential mix **Workspace** Managed workspaces Offices **Schools** **Hotels**	**Health & social** Health centre / drop-ins Youth centres **Faith** Places of worship **Workspace** IAC spaces VCS workspaces **Creative facilities** Makerspace / studio Creative facilities (music studios, rehearsal) **Education** Training, learning **Leisure** Indoor sports **Culture** Live music/ Performance **Community** Event spaces **Ancillary services** Launderettes Concierge Click & collect	**Retail & convenience** Shops, street markets, **Hospitality** Restaurants, cafes, pbars, night time **Leisure** Enter./recreation Outdoor/urban sports **Cultural consumption** Exhibition & Showcasing **Civic spaces & public services** **Community** Community spaces Community gardens **Open spaces**

KEY

Frontages

Primary active frontages : Ground floor elevations with a very high degree of visual permeability in both directions, high proportion of glazing and general activity. This includes shop windows, cafe and restaurant fronts etc

Secondary active frontages: Ground floor elevations with a high degree of visual permeability from the inside of buildings towards the outside and a lower proportion of glazing. This includes facades with residential lobbies, residential front doors and windows, lobbies to office, employment and educational spaces, terraces, balconies and wintergardens.

Indicative transition of uses

Public-facing uses

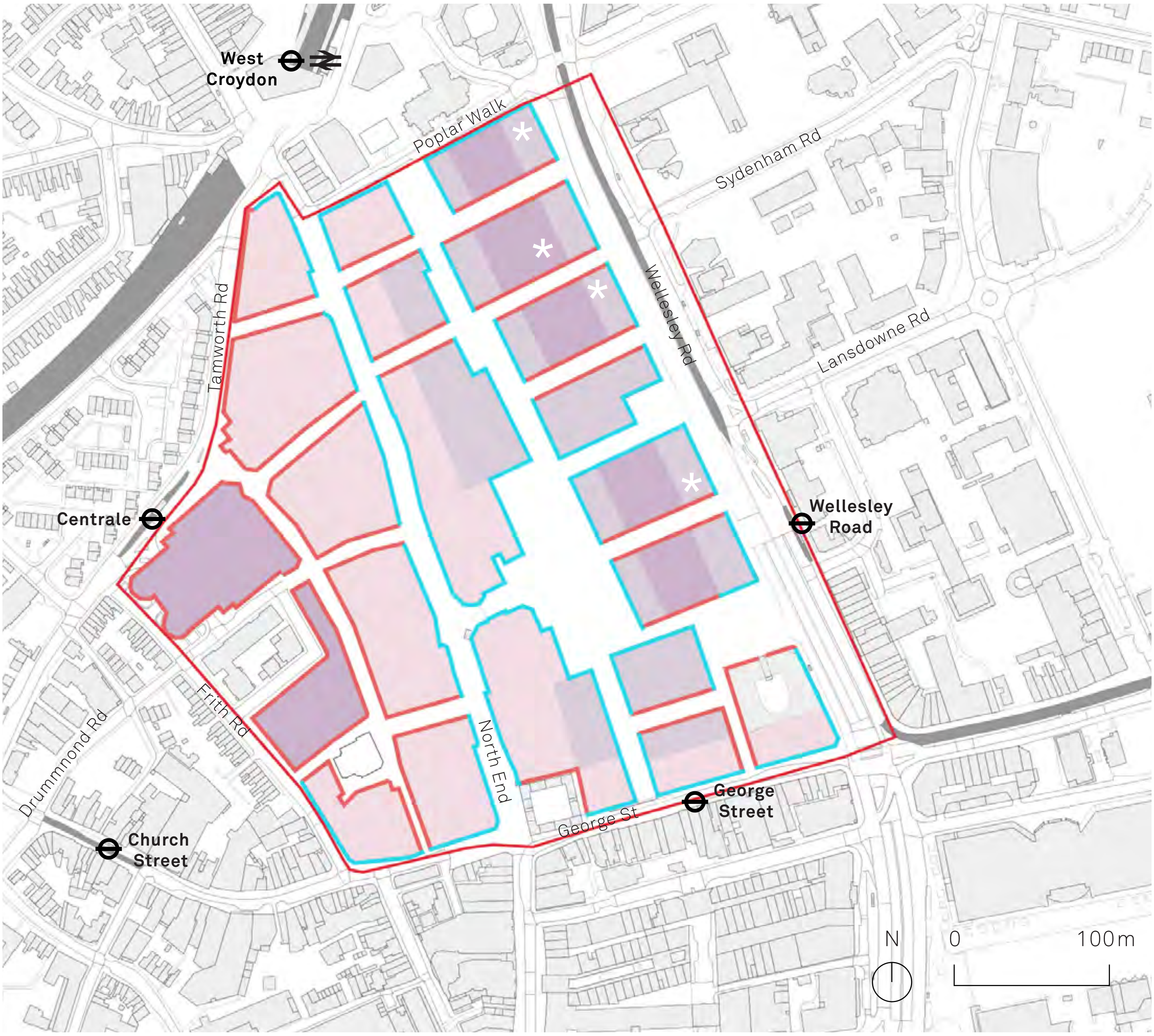
Semi-public uses

More private uses (compatible with residential)

* Position of taller buildings related to residential uses

Study area boundary

Ground floor plan



Subdivision of plots/phasing

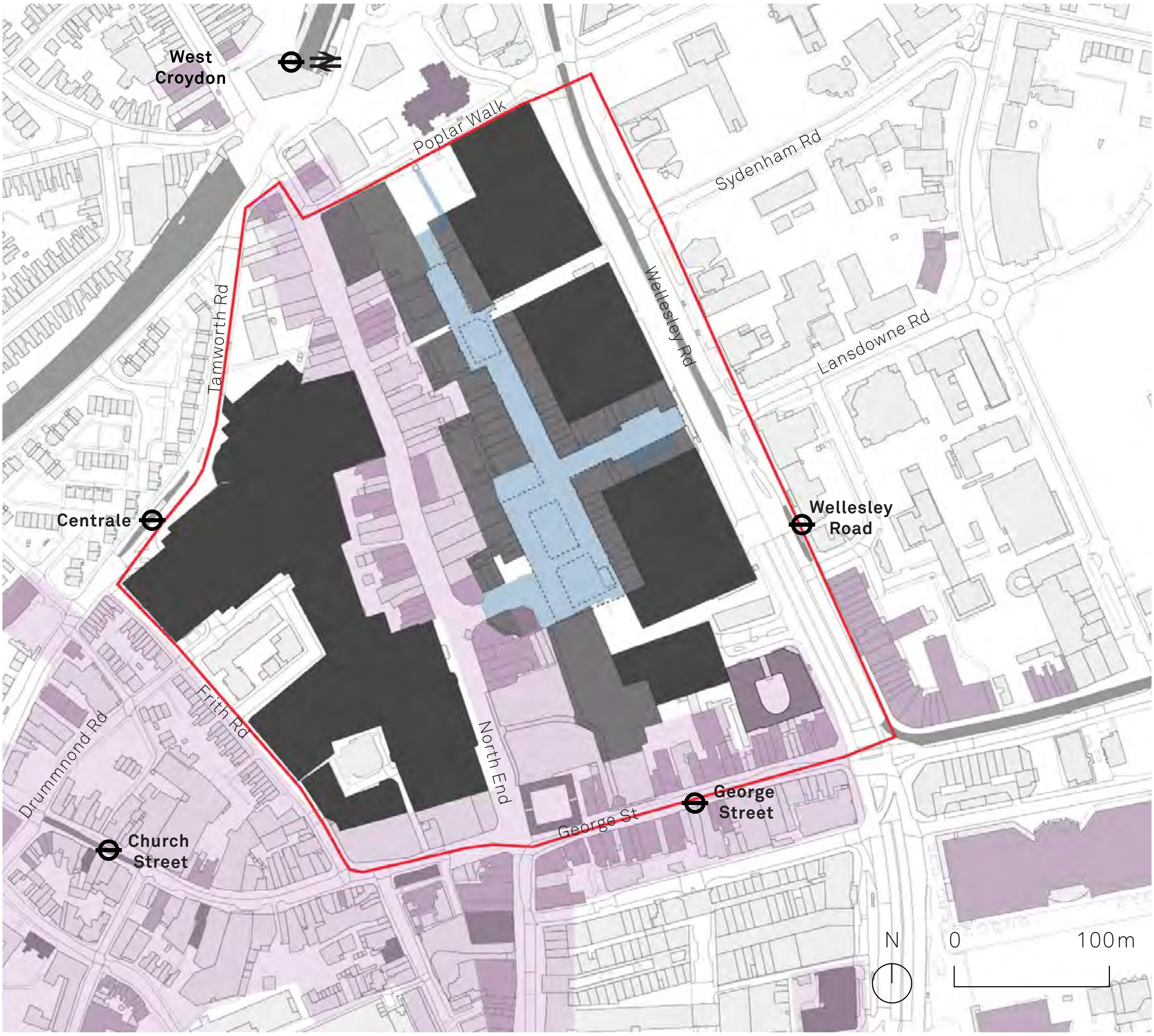
Taking a phased approach to the area's revival, development and growth will allow for greater flexibility and fluidity, as well as for a more organic and resilient transformation of the North End area. Developing a coherent and cohesive phased strategy, building on long-lasting objectives and capable of accommodating changes seem more appropriate than having a single local plan allocation and a single comprehensive redevelopment. A phased strategy can also advocate for re-use and adaptation of existing buildings, allowing for a more flexible approach to testing and innovation.

The phased approach would need to be part of a holistic framework and a clear evolutive process to ensure it is coordinated and to avoid piecemeal development and interventions.

Subdivision of plots & phasing

— Secure high quality architecture and design for the built environment across the site
— Retain/improve existing buildings/façades within conservation areas
— Improve & reconfigure the existing structure of Whitgift Shopping centre with new atriums/lightwells in the short term
— Create opportunities for development along 'softer bits' of the core area (i.e. open/multi-storey car-parking, vacant buildings etc) facing Wellesley Road & Frith Road.
— Create a clear subdivision of plots to allow for a phased strategy

Ground floor plan



KEY

Conservation area	Listed buildings
Removal of existing roof (short term)	Locally listed buildings
Possible retention of existing structure (short term)	Study area boundary
Opportunity sites for development (mid/long term)	

Setting out a clear process

The approach — in delivery and planning terms — taken for the revival of the North End area will need to be adaptable at every level. Redevelopments take time and we know that economic cycles, political priorities as well as social and technological changes can be much faster.

Targeting the regeneration approach towards challenges and missions can help steer investments and changes towards solving societal challenges, as well as generating economic growth, environmental value, equity, and wellbeing. It is also believed that focusing resources and energy on the process rather than developmet of a specific desirable end state for the area should be preferred.

LB Croydon and partners should take a pro-active approach, and work with communities and civic actors to define:

- A vision for the area, clear missions as well as overarching spatial principles: what is it to be done? How can this go in the direction of solving broad societal changes? This should be co-developed with local partners and communities.
- A new value model to ensure future initiatives and changes are responding to the desired outcomes and solving identified challenges.
- An adaptive and process-based planning; framework which can be reactive to changes; and,
- Alternate governance and delivery models to build sustainability, community ownership and wealth as well as increase participation.

A new value model

The revival of the North End area promises to breathe new life into Central Croydon and it should be ensured that its development captures economic, social and environmental value, and that any initiatives are beneficial for the environment and for existing and future residents, workers, businesses and local organisations. To ensure that long-term value is created in the North End area, LB Croydon could create a new value model based on the outcomes it would like to see, articulating quantifiable elements across the three domains. Amongst more traditional variables (e.g. land value uplift, job creation), this could also include:
— Healthcare cost savings
— Increased wellbeing
— Reduced maintenance
— Social integration
— Community wealth

The value model should be transparent and could be co-developed with existing commercial partners and local communities. It could be articulated as a toolkit that could be used to plan for future developments, assess proposed initiatives and schemes, as well as monitor progress and changes.

RELEVANT DOCUMENTS

- Croydon Natural Capital Accounting (LB Croydon 2019): measuring value of natural capital assets
- Natural Capital Planning Tool: assessing the impact of proposed developments on the value of Natural Capital and ecosystem services.
- Social Value housing framework (LSE, 2019): a framework for social value & detailed "social return on investment" framework for estate regeneration
- Tracking Social Integration (GLA, 2018)
- Royal Docks Success Framework (2020): What is the Royal Docks are trying to achieve? How will success be defined? How can success be measured?

Land value capture
Generally, the most significant land value increases arise from public policy decision, in particular the granting of planning permission and the provision of new infrastructure. While there is considerable variation in land value uplifts, landowners currently retain a very large proportion of the increase in land value arising for the granting of planning permission. History has shown that attempts to capture land value increases have had mixed success. Local authorities often struggle to strike the right balance between capturing fair values for the community without undermining incentives for private sector participation in the market.

LB Croydon could take a pro-active approach in exploring the growing priority of land value capture and using a new value model to better benefits from land value increase.

A holistic approach should also consider the fiscal benefits from infrastructure and development delivery, and not just the employment or community outcomes. And whilst land value capture mainly focus on new developments, there are also mechanisms to capture value from existing landowners and businesses.

RELEVANT DOCUMENTS

- Options for Land Value Uplift Capture (2019), Scottish Land Commission https://www.landcommission.gov.scot
- Sharing the uplift in land values, tomorrow series paper, Town & Country Planning http://uk2070.org.uk/wp-content/uploads/2019/09/LandValues.pdf

Adaptive but robust planning framework

The Local Plan is being prepared at a time of great uncertainty, with COVID-19, Brexit and economic recession. There have also been recent significant changes to the national planning framework (including changes to the Use Classes Order and further Permitted Development Rights and Prior Approval processes) and a radical overhaul of the current 'discretionary' system planning system, Community Infrastructure Levy and s106 legal agreements is proposed.

In order for the emerging vision and principles to be most effective in securing transformative change in such turbulent times, planning policy and associated guidance needs to flexible and responsive. A suggested way forward below is based on process. Is is worth spending a long time preparing a piece of guidance, such as a detailed masterplan for the area given current uncertainties? LB Croydon could retained a level of flexibility within their plans and work in close collaboration with the landowner(s), wider community and developers to support the diverse and sustainable development for the area. However, this will require setting out a clear direction of travel and framing clear missions and desired outcomes so that strategic and local investments are all directed to meet the same objectives. Establishing a new value model will be an important part of the jigsaw.

Overall, planning policy should:
— Embed the Vision and principles in the Local Plan to give them weight.
— Based on the new value model, set out performance monitoring metrics that will be used to judge progress and trigger adjustments, (e.g. land value, new green space hectares, number of new trees, social integration ans wellbeing, new homes).
— Set out a bespoke process-based approach and delivery strategy.

A flexible and process-based approach would require LB Croydon to be pro-active working with local stakeholders, landowners and developers. Annual review of the strategy and monitoring of progress could take place to allow for the framework to keep pace with changes on-the-ground and at macro-economic level.

A planning delivery strategy could be composed of:
— A North End area Board (Senior Council officers, Cabinet Member, Ward councillors, land-owners, GLA, TfL);
— A North End area Forum ('Citizen assembly' model - representatives of local residents, businesses, workers);
— A dedicated North End Council Team (A core team: Regeneration, Plan-making, Place-Making, Development Management and Transport - other expertise can be brought in as necessary);
— Use Croydon Place Review Panel to improve quality of proposals;
— Use Planning Performance Agreements to help fund Officer Team;
— Annual Delivery Statement – report on performance monitoring metrics and recommend adjustments to the strategy (within the ranges expressed in policy).

Delivery options

If Croydon is to secure delivery of transformative projects in the short to medium term, it will require the intervention of the public sector and new ways of organising to support delivery. New projects need to be different, probably more human in scale, and certainly more aware of the social and environment impacts they deliver. Anything from temporary use of empty spaces, to acquisition of land and buildings can be achieved through locally-led delivery bodies such as co-operatives or community-owned property companies – but none of this can be achieved without a stronger public sector. Clearly, funding new activity will require new solutions. Municipal or Social Impact Bonds, are all worthy of consideration as Croydon seeks to plot a different course.

While it is difficult to set out a clear delivery strategy given current uncertainties, below are summarised possible levers of action and intervention. These are organised to reflect short, medium, and longer-term possible approaches.

In the short term, catalyse interest and usage through physical interventions in the public realm.
It is envisaged that early interventions in the public realm along with precursors and interim uses, will be the key to unlocking the revival, development and investment in the area. This will also demonstrate that change is occurring and set the tone for the future.

A wider programme of public realm improvements, way-finding and animation should be encouraged in order to catalyse interest and usage. LB Croydon does not have a range of options and avenues to use its existing interests in assets in the North End area. However, where it can, the council should use them to best effect. Investment in the public highways could be made: for example, the provision of comprehensive rain gardens along roads and streets. While this may sounds somewhat sacrificial, this kind of interventions would help in halting decline, signalling support to local businesses and owners and activating the area.

Set up an interim use and precursor strategy
Together with adaptive reuse of existing structures, meanwhile use can provide opportunities for community formation and interaction, or trial new uses such as affordable workspace. Part of the utility of meanwhile use schemes lies in testing ideas. Successful tests can inform longer-term strategies for new social infrastructures, affordable workspace provision, and public realm improvements. Schemes should always be developed with a comprehensive evaluation and monitoring strategy, and use a solid evidence base to compare results.

A phased approach for the revival and growth of the North End area would require setting out meanwhile and interim uses of existing spaces, as well as precursors and early wins which may also retrofit and reuse existing buildings where appropriate during the transformation period, and beyond.

Meanwhile uses, precursors and early phases will play a crucial role in the North End area's revival as it undergoes transformation. They will ensure that the town centre does not suffer from blight as elements of the area undergo redevelopment or renewal, by helping to attract residents and visitors to the town centre at all times. Building and maintaining footfall, public life and supporting existing businesses in the town centre will be critical for ensuring the long term success and resilience of transformation, as those businesses will be the bedrock of the development of the North End area.

Use and invest in assets
Given some existing ownership and the reduction in value across the town centre, LB Croydon can play an curatorial role in the evolution and recovery of the centre, which means using their own assets and potentially securing third party assets in key locations to create the right conditions (i.e. affordable and flexible terms offered to end-users) that enable local businesses, entrepreneurs and community organisations to occupy these assets. This could support the delivery of a mixture of uses that will activate the North End area, inject a new dynamism and lay out the foundation for a new dynamic, productive and inclusive centre.

There are a number of ways that this could happen, including:

— Assets within a Council's own portfolio may be let on affordable terms to an operator or end-user and an 'undervalue' is permissible. Wider performance measures can be designed into this arrangement to quantify the social and economic impact and rationale for the lease price.

— For assets in third party ownership, a Council can take on the role of head lessee with a strong covenant, in order to deliver the same arrangement via a sub-lease, thereby creating an important bridge between assets in private ownership and the businesses and community groups that will bring assets and neighbourhoods back to life. LB Croydon could potentially acquire an interest in a larger unit and lease this on to a workspace operator or other relevant community use. This could take the form of a social value/profit share lease in order to incubate less commercially oriented models (e.g. affordable workspace) and LB Croydon could explore realising the opportunity through a joint venture arrangement as well as a more conventional management agreement. The former Allders building could be re-purposed to provide a blend of uses (e.g. workspace, community uses) and become North End's new flagship building. LB Croydon could also take leases on a small number of units and to refurbish these as 'white box' units for people to test and innovate ideas. This approach has worked very well elsewhere (see 'Renew Newcastle' precedent). Alternatively, access to empty spaces could be negotiated with the partnership.

Socially-Oriented Property Management Company
Whilst this approach could be adopted by a LB Croydon on a piecemeal basis, there is also an opportunity to establish something more permanent, which can enable the transfer of ownership to the community. A Socially-Oriented Property Management Company (Soc-PMC), which could take a portfolio approach to managing local assets against a suite of clearly defined, social and commercial aims, objectives and deliverables that address affordability and target local sectors and groups.

LB Croydon would agree a basket of leases with the Soc-PMC, alongside a Service Level Agreement, which would guarantee a required level of income to the Council and define the expectations regarding the social and economic impacts to be achieved and reported; through tenant management and by end user tenants.

The objects of the Soc-PMC, together with the evidenced social impacts would also make the venture attractive to charitable funding and impact investors.

Having multiple assets under one ownership structure would allow the operation to benefit from economies of scale and the portfolio can be a mix of purely social and more commercial activity: By taking on multiple sites, or sites with mixed tenants (e.g. for profits and not for profits) a cross-subsidy model is enabled, whereby surpluses from commercially-oriented assets and activities could be reinvested to subsidise not for profit activities, to support other affordable workspace within the borough or to secure and mobilise further buildings.

The socially-oriented objectives of the Soc-PMC may also enable it to sources of grant funding and depending on its corporate structure attract a level of Business Rates Relief.

Opportunities for stakeholder and community representation within the stewardship and governance arrangements for the Soc-PMC can also be developed, with the venture sitting alongside other models such as Community Land Trusts and Community Led Building that seek to deliver inclusive economic benefits and improved, long-term community stewardship within our cities, towns and neighbourhoods.

PRECEDENTS

PRECEDENTS

The following pages present a series of precedents which illustrate how the suggested emerging principles could be translated into actions or physically. The precedents are numbered and ordered to reflect the principles' order (1 to 8).

1. Re-imagining the Civic Commons, San Jose

Re-imagining the civic commons
Demonstrating that transformative public spaces can connect people of all backgrounds, cultivate trust and create more resilient communities.

Reimagining the Civic Commons is a North American programme of activity, which focuses on better using broad evidence, insight and participatory techniques, to support the evolution of places. The programme seeks to balance economic, social and environmental outcomes in parks and downtown areas, with strong evidence and monitoring as the uniting feature of the approach.

Downtown San José is in a unique position of seeing one of the region's most significant public and private investments, in a district largely composed of parking lots and under-invested civic spaces. Capital is flowing in to transform the areas major multi-modal transit hub, Diridon Station. It is seen as critical to balance the investment in physical infrastructure with that of spaces, which bring people together, connect urban habitats, and provide a healthier quality of life. San José has the unique opportunity to leverage the momentum to realise the full potential of its downtown civic commons – having public life be the lead redevelopment strategy.

https://civiccommons.us

1. Crosstown Concourse, Memphis

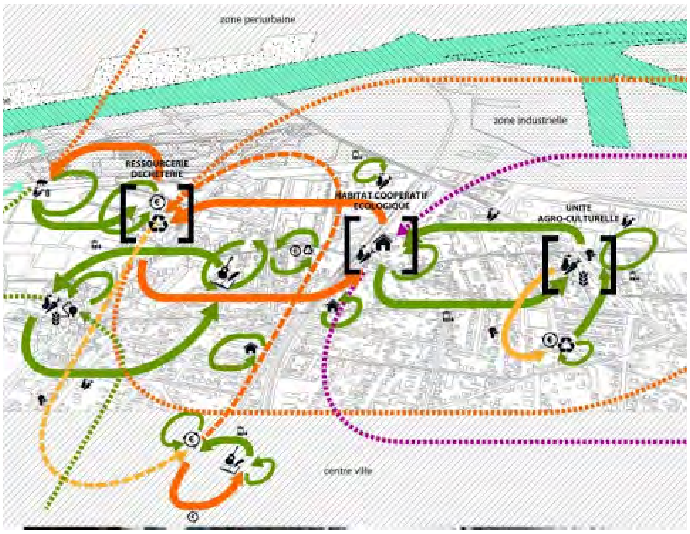
Crosstown Concourse
Catalyse meaningful social change beyond the building's footprint.

Crosstown Concourse is an example of what can be delivered when partners and community focus on social and health outcome when redeveloping a major property asset. Formerly a Sears store and distribution centre, Crosstown Concourse has been revitalised as a mixed use facility which blends retail, apartments, places of worship, scientific labs, library, school, higher education, arts, maker spaces and offices. It functions as much as a social space as it does a location of commerce. It was enabled by unique collaboration between local community organisations, developers, city government and philanthropists. By focussing upon a broader range of outcomes (akin to Public Value), they were able to secure a mix of uses which drive wellbeing as much as they drive spending.

https://crosstownconcourse.com
https://vimeo.com/281266781

1. R-Urban agency

© R-Urban



R-Urban

Architect:	Atelier d'architecture autogérée
Date:	2012-today
Location:	Colombes, Paris

R-Urban is a European organisation that promotes practices and networks to develop urban resilience. It produces projects that aim to benefit communities and the economy by focussing on closed ecological cycles. A R-urban agency have been made to pilot the implementation of the first units of Colombes- town of 80,000 inhabitants located in the suburb of Paris - in order to catalyse creation of local production-distribution cycles, network and practices about recycling, self-construction, urban agriculture and collective housing.

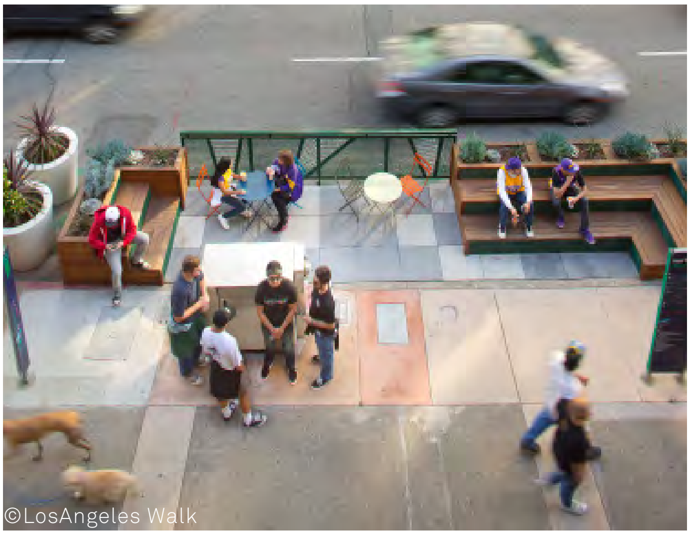
In its initiation phase, the project proposes the creation of a resilient network based around three prototype production units,with complementary urban functions, bringing citizens emerging projects together and actively involving local people in and around Colombes:

— AgroCité – a unit of urban agriculture which consists of a micro-experimental farm, community gardens, educational and cultural spaces and devices for energy production, composting and rainwater recycling.
— RecyLab – a recycling and green building constructed around a series of equipment for the recycling of urban waste and turning them into materials for eco-construction.
— ECoHab – a residential unit, cooperative and ecological consisting of a number of experimental units and community spaces which in part are self-built.
— AnimaLab – a domestic farm located in the Agrocité, bend of micro-structure like beehive and chicken coop. The productions are integrate in the local distribution network throught the store local shop of the agrocité.

Key lessons

— Project that demonstrates clearly how an urban common could be formed.
— Creation of a network of spaces in which commoning takes place, sharing the products and resources generated by those activities in "closed-loop" cycles that keep value within the project rather than allowing it to be capitalised upon.

1. People St programme, Los Angeles



People Street programme

Date: 2014
Location: Los Angeles, USA

In 2014, the department of transportation launched the People Street programme, an initiative that offered what are essentially DIY urban design kits to create pedestrian plazas, mini-parks and bike parking to re-appropriate any of the 7,500 miles of street within the city.

People St is the culmination of many years of cooperation and collaboration between community groups, elected officials, City staff, and other non-governmental organizations to broaden capacity for innovative urban design at the neighbourhood level.

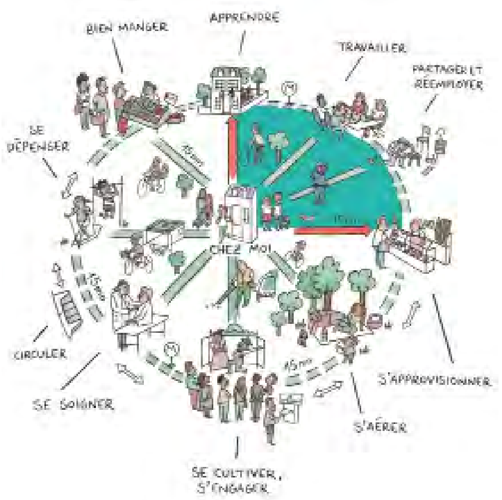
The kits offered pre-approved design configurations for different types of spaces and were publicly downloadable, the idea being that members of the community would initiate new public spaces in their local area. The projects are permitted for a year with the option to renew. Since 2014, 23 new public spaces have been created across the city.

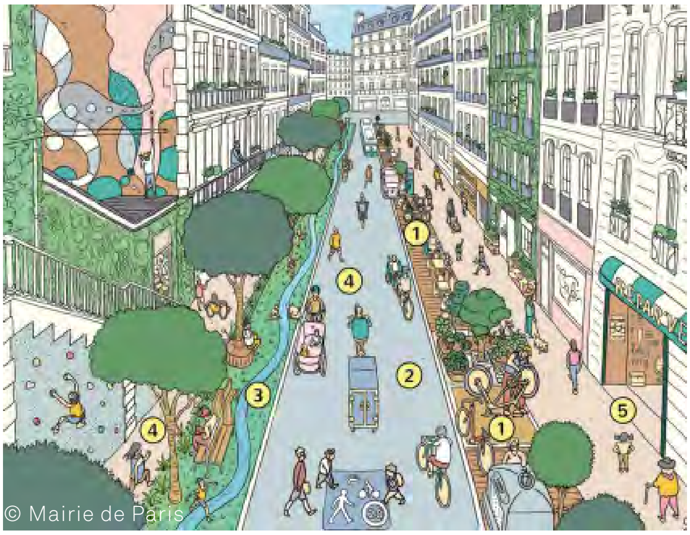
While the city is providing financial and technical support to develop the project, eligible community partners are responsible for the maintenance of the space.

Key lessons

— Community-led and maintained public space
— Development of a 'care' culture, purposeful maintenance producing social fabric

2. 15-minutes neighbourhood, Paris





© Mairie de Paris

15-minutes city plan, Paris

Date: 2020
Location: Paris, France

In her successful mayoral re-election campaign, Anne Hidalgo, mayor of Paris, has outlined her vision for the future of the French capital.

The “15-minute” idea is based on research into how city dwellers’ use of time could be reorganised to improve both living conditions and the environment. The concept of “la ville du quart d’heure” is one in which daily urban necessities are within a 15-minute reach, on foot or by bike. Work, home, shops, entertainment, education and healthcare — these should all be available within the same time a commuter might once have waited on a railway platform. The idea is based on four principles: proximity, diversity, density and ubiquity.

Key lessons
— Combining & balancing metropolitan & local neighbourhood functions.
— Blend of uses provided at local level, sustainable modes of transport supported.
— Increased local participation and engagement.

https://www.ft.com/content/c1a53744-90d5-4560-9e3f-17ce06aba69a

2. Game Streetmekka, Viborg

© Rasmus Hjortshoj

© Rasmus Hjortshoj

Game Streetmekka

Architect: EFFEKT
Date: 2018
Location: Viborg. Denmark
Uses: Urban sports facilities, music studios, animation studio, maker-lab, artists studios, informal community spaces

Game Streetmekka Viborg is a pioneering project on how to bring new life to one of the many vacant industrial buildings, by transforming it into a new vibrant culture house for street sports, street culture and street art.

The existing building originally served as a windmill factory and is a typical example of one of the many more or less identical mass produced warehouses or factories buildings from the late 1960's and 1970's found in almost every suburban industrial zone in the western world. Typically constructed from prefabricated concrete panels, or corrugated steel, industrial leftovers are perceived as having little to none historic, cultural and architectural value.

The building is filled with new functions for both trial, parkour, basket, skate, bouldering, dance and also customized workshop areas for DJing and music production, an animation studio, maker lab and artist studios. Social spaces and designated hangout zones are strategically inter-weaved into the functional program and distributed throughout the building.

The surrounding landscape is filled with various street sports and street cultural functions, placed within a recreational string of greenery connecting to the main city-pathway of the area.

Key lessons
— Indoor-outdoor public and leisure spaces dedicated to urban sports and community uses.
— Informal meeting areas are distributed throughout the building. This layout was based on the notion that proximity to activities lowers the threshold for participation.
— Re-use of existing structure in a qualitative way and for a limited budget.

http://gamedenmark.org/game-streetmekka-2/koebenhavn/

2. Wild West End, London

© WildWestEnd MIEMA CEn

Wild West End

Delivery: Partnership between Church Commissioners for England, The Crown Estate, Great Portland Estates, Grosvenor Britain & Ireland, The Portman Estate, The Howard de Walden Estate, Shaftesbury, ARUP and local BIDS
Location: West End London
Date: Ongoing programme

Central London's largest property owners are working together to encourage birds, bees and bats back into the heart of London, and create greater connections with nature for residents, visitors and workers to enjoy. The programme is creating green stepping stones between the existing areas of surrounding parkland, through a combination of green roofs, green walls, planters, street trees, flower boxes and pop-up spaces.

The shared mission aimed to:

— Improve the wellbeing of residents, workers and visitors by increasing connections to green space and nature and contributing to improvements in local air quality.
— Enhance biodiversity and ecological connectivity.
— Raise awareness and promote the benefits of green infrastructure to inspire others to participate and create similar initiatives.

Wild West End adopts the Preliminary Ecological Appraisal methodology for green spaces. This assesses areas over 100 sqm for the relative abundances of the different species of flora to determine whether or not there has been significant change in individual species' abundances over the previous two years. All green spaces and features are assessed for their value, according to the Wild West End 's definition of valuable green space by function' matrix, and categorised to quantify their potential natural capital. Features are categorised by their area and broad habitat/feature type.

Key lessons

— The programme demonstrates the positive impact of urban green infrastructure with clear measurement strategies in place.
— Collating data on value of green infrastructure to support the business case.
— Strengthening and increasing green infrastructures and corridors.
— Promote access to green spaces for all.

http://www.wildwestend.london

2. Nature Urbaine, Paris


© Valode and Pistre


© Valode and Pistre

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Architect: Valode & Pistre
Date: 2020
Location: Paris
Uses: Urban farming, community/event space, restaurant/bar, educational

Situated on the 14,000 sqm roof of the French capital's exhibition centre Paris Expo, Nature Urbaine is a high-tech vegetable garden offering spaces to those who want to cultivate their own crops in the city. The urban farm is a part of the decade-long renovation project to make the exhibition center a model for sustainable development.

With 140 farm plots available to rent, the fruit, vegetables, and herbs grown on site (of which there will be some 30 different varieties) will be available to the expected 10,000 visitors per year, and the rooftop will be able to produce several hundred kilos of food every day. There will also be a bar and restaurant at the exhibition hall, which will integrate the fresh produce into their dishes. A 400sqm event space will also be available to rent.

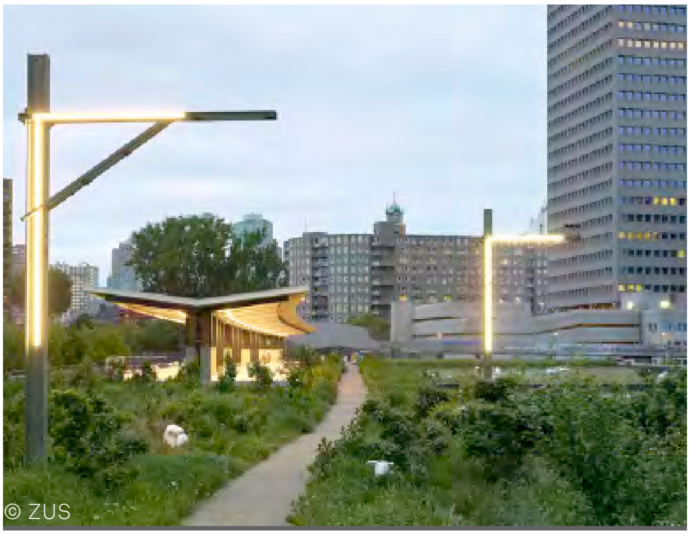
The urban farm is run by urban farming specialists Agripolis, which are using tested aeroponic and hydroponic growing techniques, and community organisation Culture en Ville, who is focusing on community activities. The overall objective is to make this urban farm a global model for responsible production and urban resilience, as well as reconnect Parisian residents with local agriculture and healthier diets.

Key lessons

— Productive landscape combining innovation/research, education and leisure uses.

https://chroniques-architecture.com/valode-pistre-pavillon-6-foire-expo-paris/

2. Luchtsingel/Luchtpark, Rotterdam


© ZUS


© ZUS

Luchtsingel / Luchtpark

Architect:	ZUS
Date:	2011 - 2014 - 2018
Location:	Rotterdam
Uses:	Public realm, green spaces, urban farming, event spaces, night-time

Decades after their separation, the 400-meter-long Luchtsingel pedestrian bridge has reconnected three districts in the heart of Rotterdam. The Luchtsingel is the world's first piece of public infrastructure to be accomplished through crowd-funding. Together with the new public spaces, including the Delftsehof, Dakakker, Pompenburg Park, and the Hofplein Station Roof Park, a 'three-dimensional cityscape' has arisen.

Architecture practice ZUS used a former office building, the Schieblock, to develop a city laboratory, which currently acts as an important incubator for young entrepreneurs. With its ground-floor store, bar, culinary workshop, information centre, and its rooftop-field called the Dakakker, Europe's first urban farming roof, it has become a prototype for sustainable development.

The Delftsehof area was transformed into one of Rotterdam's most vibrant night-life areas, the Pompenburg Park, with a vegetable garden and playground was landscaped. By simply increasing accessibility and connectivity for pedestrians, the 400-meter-long bridge ensures synergy between these sites and has acted as a catalyst for the regeneration of the area. It functions as public backbone for further developments on, alongside and under the bridge.

Key lessons

— New way of creating urban qualities in a post-crisis economy.
— New routes through disused existing structures create links between disconnected areas.
— New route as public backbone for future developments.
— Prototype for sustainable development including productive and educational farms.

https://zus.cc/projects/luchtpark-hofbogen

2. Ron Finley Project

© The Guardian

© WorldWar Zero

Ron Finchley project

Date: 2010-today
Location: Los Angeles, USA

Known as a ‘Gangsta Gardener’, Ron Finley is a gardener and community leader in South Central in Los Angeles, infamous for gang violence and for being the epicentre of major race riots. The project initially started with Ron’s idea to change South Central from a food desert, where cheap convenience and fast good is plentiful but organic, healthy options are hard to come by, to a food forest. Inspired by the idea of turning unused space such as parkways and vacant lots into fruitful endeavours, Ron Finchley creates gardens and gathering places that are thought as community hub, where people learn about nutrition and join together to plant, work, and unwind.

‘Ron envisions a world where gardening is gangsta, where cool kids know their nutrition and where communities embrace the act of growing, knowing and sharing the best of the earth’s fresh-grown food.’

Key lessons

— Use vacant lots to create productive landscape which strengthen social fabric and promote healthy lifestyle.

— Importance of community leader: strong community leadership and figure, representing neighbourhood’s diversity and inspiring young people.

http://ronfinley.com

2. Co-op City
Zurich

Co-op City, Zurich

Location: Zurich
Date: Ongoing

Out of 220,000 Zurich homes, 39,000 belong to housing co-operatives, which means 17.7% of all housing is community-led and owned by co-op members.

Largely self-financing operations, these co-operatives are built and run on equity deposits and membership fees paid by residents and other private investors; below-market-price apartment rentals that are worked out with the goal of covering the expenses of the co-operative. These expenses include building servicing, repaying interest on any initial loans, management and maintenance costs, and the storing up of capital to finance future developments. When residents leave, their equity share is returned, adjusted in line with inflation, but not market speculation, which stops the housing market from becoming dangerously over-heated.

Even beyond any perceived benefits to communities, in simple monetary terms the city of Zurich saves millions a year in social costs (like aged care costs and benefits) by enabling co-operatives to operate, as these co-operatives provide affordable rents for mid to low income tenants that keep other government living assistance payments low. In return for the use of city land however, the co-operatives must meet a number of commitments. These include the provision of a portion of low cost rental housing for qualifying applicants, the reserving of at least one per cent of the gross floor area of the development for public use, and the carrying out of an architectural competition administered by the city, in order to determine the design and the choice of architect.

Key lessons
— Sites that look unpromising to conventional property developers can appeal to community-led organisations.
— Combining successfully different types of housing.

https://www.architectural-review.com/archive/how-housing-co-operatives-built-a-city

2. Community Wealth Building in Preston

© CLES

The Preston model

Date: 2011-today
Location: Preston

In 2011, faced with among the largest central government cuts in the country, and with a £700 million investment in a new shopping centre falling through, the city of Preston embarked on an effort to reimagine its growth model. Instead of relying on often footloose and extractive forms of inward investment to drive the local economy, the council began pioneering a community wealth building strategy. At the heart of this approach is an effort to build a more inclusive, rooted and democratic economy, drawing on the collective strength of the local public sector, businesses and communities.

Central to this has been an innovative use of public procurement, which explicitly aims to develop the cooperative sector. This began with the identification of 12 major institutions that are geographically rooted in Preston, ranging from the hospital to the police to the university and city council. The procurement strategies of each of these was redesigned to ensure that these institutions and their supply chains as far as possible paid the living wage. The council have also helped establish two worker cooperatives to fill procurement gaps. Alongside this, concerted efforts have been made to redirect spending to local businesses, including cooperatives. .

The council is expanding the cooperative economy through Preston's Cooperative Network – supporting new and existing cooperatives to grow and bid for contracts from anchor institutions. The council is in the process of establishing a Lancashire Community Bank designed to lend to cooperatives and small businesses that currently struggle to access finance.

Key lessons

— In an austerity context - vital partnership role innovative local government can play in fostering cooperatives and a more rooted local economy, not least through innovative procurement policy and a supportive local financial system.

https://cles.org.uk/wp-content/uploads/2019/07/CLES_Preston-Document_WEB-AW.pdf

2. Grey to Green Strategy, Sheffield

Grey to Green project and strategy, Sheffield

Location: Sheffield
Date: Ongoing

The 'Grey to Green' scheme has grown out of proposals in the City Centre Masterplan 2013 and is a key step towards expanding the boundary of the Sheffield City Centre back to its historic origins around the River Don.

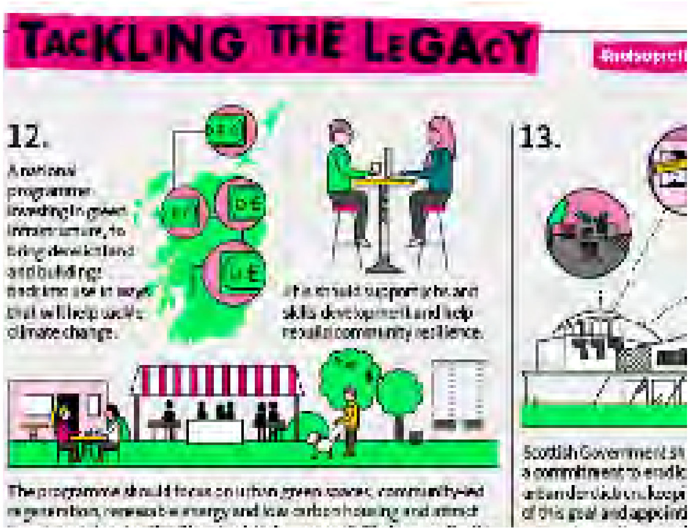
The overall Grey to Green project transforms 1.3 kilometres of redundant roads into attractive new linear public spaces. This includes innovative perennial flower meadows, an interlinked sustainable urban drainage system (SUDS), rain gardens, public art and high quality paved footways and street furniture. Phase 1, now completed, also includes five eye-catching public art 'totems'.
The project creates an attractive setting for existing and new investment and jobs, an improvement in the city's resilience to climate change as well as an enhanced public realm and connectivity of the area with the rest of the City Centre. It also shows off new forms of partnership with the University of Sheffield Landscape School, Amey and Robert Bray Associates by sharing expertise to solve problems in an innovative way.

Key lessons

— Positive transformational change of the environment of an important inner city area for economic, habitat and wellbeing benefits.

https://www.nigeldunnett.com/grey-to-green-2/

2. Land Reuse Framework, Scotland



Land reuse framework and guidance, Scottish Land Commission

Location: Scotland
Date: 2020

The Scottish Land Commission has released in 2020 a guidance on assessing the full economic benefits of the productive reuse of land. This means economic benefits in their widest sense, with wellbeing as the foundation stone of a thriving economy.

There are over 11,000 hectares of vacant and derelict land in Scotland, which harms wellbeing and limits opportunities. This is particularly concentrated in deprived communities; therefore investing in them and bringing them back into productive use could help to play a role in developing communities, tackling climate change, reducing inequalities, improving well-being and delivering inclusive growth. Pre-existing approaches to estimating the benefits of land redevelopment centre around land values, jobs and income created; however much of Scotland's vacant and derelict land is in areas with limited commercial development potential. Consequently, there is a need to change the way projects are assessed, so that the decisionmaking process considers a fuller range of benefits, that productive reuse generates for society in a much wider sense so that fewer sites remain vacant and derelict for a long time. The document provides guidance on how to capture the full economic and well-being benefits of reusing vacant and derelict land.

Key lessons

— A new evaluation model to understand benefits of the productive reuse of land.

https://biggareconomics.co.uk/reuse-of-vacant-and-derelict-land

3. Kings Cross


© Argent

© Global Generation

King's Cross

Architect:	Argent
Date:	2012-today
Location:	King's Cross, London
Uses:	Mixed-use

The transformation of 67-acre brownfield site to a new vibrant city quarter including homes, shops, offices and community facilities

King's Cross is the largest mixed-use development in single ownership to be developed in central London for over 150 years. The 67 acre site has a rich history and a unique setting – and it is adjacent to the best connected transport hub in London.

Argent, as developer and asset manager for the site, has placed a strong focus on securing positive social outcomes from the outset. The development has been guided by Argent's ten 'Principles for a Human City' which places an emphasis on long-term stewardship, high-quality, inclusive design, accessible public realm, diversity, and engagement. Commitment to these values has helped to shape the overall 'sense of place' at King's Cross and provided the conditions to optimise long term social impact.

Reflecting aspirations set out in Principles for a Human City, wider place shaping activities have been an integrated thread running, cutting across and underpinning delivery to date. There has been significant emphasis on activating King's Cross from the very first phases of the development: creating a vibrant and long-lasting environment in which people want to live, work and visit. Central to this has been the delivery of over 70,000 m2 of public realm, providing space for a diverse range of uses, from major events, to community group meet-ups, to art installations and creative and cultural meanwhile uses.

Key lessons

— Phased development, strong principles and clear outcomes.
— Significant emphasis on activating KX from the very first phase of the development, starting with the delivery of public realm and the provision of space for diverse range of uses from major events to community groups meet- ups, art installation and creative meanwhile uses.

3. Cityplot Buiksloterham, Amsterdam

Cityplot Builksloterham, Amsterdam, Netherlands (Masterplan)

Architect: Studioninedots
Date: 2013-2021
Location: Amsterdam, Netherlands
Uses: Residential, workspace, social and community infrastructures, convenience retail

The phased and 'live' masterplan for Buiksloterham had to adopt a flexible approach to planning to allow for maximum flexibility in terms of land uses, and to enable mixed-use and organic development combining formal and informal instruments in an innovative way. Building activities have started to transform the mono-functional industrial district into a vibrant new part of Amsterdam, that will function as a living urban lab. Developments include 550 residences and at least 4,000 m2 of work units and hospitality locations.

Cityplot arose from the need to reconsider how conventional urban planning strategies could open up to more flexible models of development. The housing corporation wanted to develop the site not in a conventional way in large, fixed blocks, but as part of a flexible urban planning concept called Cityplot. This concept is a dynamic process that combines self-build projects with social housing, work/home units and social hubs, bringing together individuals, collectives, investors, and small-scale developers.

The dynamic masterplan retains individuality while engaging residents to shape their own city. As opposed to a traditional urban plan with a fixed end result, Cityplot Buiksloterham will keep evolving. The small scale and mixed-use nature of Cityplots supports ongoing dialogue that is essential for community engagement; dialogue between architecture, functions and participants, and between the city and the economy.

Key lessons
— 'Live' and dynamic masterplan.
— Flexible approach to planning to allow for maximum flexibility in terms of land uses to enable mixed-use and organic development combining formal and informal instruments in an innovative way.

https://studioninedots.nl/project/cityplot-buiksloterham/
https://pure.uva.nl/ws/files/1523659/124693_CONTEXT_Report_2.pdf

3. Matadero Madrid


© Matadero Madrid / Cineteca Madrid


© Matadero Madrid / Cineteca Madrid

Matadero Madrid, Spain

Architect:	Various
Date:	2016
Location:	Plaza de Legazpi. Madrid
Uses:	Cinema, performing arts centre, art galleries, training classrooms, library, auditorium, music academy.

Matadero Madrid is a former municipal slaughterhouse, located in the Arganzuela area of Madrid. The building was originally built at the start of the 1920s and, at the time, it was a fine example of industrial architecture. Once the slaughterhouse closed down in 1996 the building fell into disrepair until the start of the 21st Century, when Madrid City Council decide to harness the potential of the building, and convert it into a contemporary arts space.

In 2005, when permission was granted to give the complex a cultural use, at the direction of the Arts area of the Madrid City Council, work began on new projects whose fundamental premise is architectural preservation of the exterior of the warehouses. Without conflicting with the above, the centre became an architectural testing ground, holding reversibility of the work done as a guideline, which would enable the buildings to be returned to their original state.

Over the years, and through a programme divided into multiple phases, different areas have been added to the renovation process and units with different uses have been opened to the public.

Key lessons

— Phased renovation of abandoned buildings and public areas belonging to Madrid's historical heritage.

— Each partner is responsible for one specific area. Each space has its architectural project, equipment and means to develop.

— Uniform criteria to implement aesthetic solutions.

https://www.mataderomadrid.org

3. Tainan Spring, Tainan


© MVRDV


© MVRDV

Tainan Spring

Architect: MVRDV
Date: 2020
Location: Tainan, Taiwan
Uses: Public space, play area, outdoor event/performance space.

Transformation of a former city-centre shopping mall into an urban lagoon surrounded by plants, reconnecting the city with nature and its waterfront.

Commissioned by the Urban Development Bureau of the Tainan City Government, the completed masterplan rejuvenates a 'T-Axis' to the East of the Tainan Canal, creating a new landscape strategy to unify the site of the former China Town Mall and a kilometre-long stretch of the city's Haian Road.

In addition to the new public square and urban pool, the plan includes improved public pathways, a reduction in traffic, and urban greening.

China-Town Mall was built on top of the old harbour next to the Tainan Canal in 1983. A large commercial structure that no longer serves its intended purpose. Tainan Spring shows what solutions are possible for unused shopping malls now that online shopping is supplanting physical stores. The China-Town mall has been removed and meticulously recycled, making the project an innovative example of the circular economy

The underground parking level has been transformed into a sunken public plaza with playgrounds, gathering spaces, and a stage for performances, while the artful deconstruction of the building's concrete frame has left a number of follies that can in due course be converted to shops, kiosks, and other amenities.

Key lessons

— Unused shopping facilities can be turned into more beneficial public spaces, as online shopping becomes increasingly popular.
— Preserving elements of the shopping centre. serves as a reminder of what was there before
— Part of a wider masterplan to rejuvenate the area.
— Some lettable area lost but some value uplift anticipated.

https://www.google.com/search?client=safari&rls=en&q=Tainan+Spring&ie=UTF-8&oe=UTF-8

4. The Forum, Groningen


© NLA Architects


© Marcel van der Burg Photography

The Forum

Architect: NL Architects
Date: 2019
Location: Groningen. The Netherlands
Uses: Library, exhibition space, meeting rooms, cinema, bar/restaurant, public rooftop, auditorium.

Forum Groningen is a 'Cultural department store' which have replaced the city centre shopping precincts. Located in the centre of Groningen, the building is filled with books and images, and offers exhibition spaces, movie halls, assembly rooms, and restaurants. The Forum aspires to become a platform for interaction and debate, a 'living room' for the city.

Forum Groningen is not a library, not a museum, not a cinema, but a new type of public space where the traditional borders between these institutes will dissolve. At the heart of the building is an elaborate multi-level atrium where the public will be encouraged to meet, work, and spend time in. The building does all it needs to at street level, creating space for leisure and community, even realigning the buildings along the neighbouring Grote Markt to de-prioritise cars, but inside it is a solar system of things designed to prepare Groningen's citizens for 21st century life in an un-patronising, self-guided way.

The brief was not only to attract visitors but make people want to live in Groningen long term. Nearly one in four residents are students but few people stay longer than five years. The Forum was conceived as an all-in-one cultural centre that would provide a new home for the library and city archive and include an exhibition hall, art-house cinema, auditorium, café, restaurant and an element of local history, as requested by locals during consultations.

Key lessons

— Experiential cultural centre housing a library, cinema, an auditorium, a science museum, media and research labs, restaurant and cafes, free to use VR-AR facilities and gaming stations, roof top terrace.
— Local consultation informs the program of the building.

https://forum.nl/en

4. Oodi Central Library, Helsinki

© ALA Architects

© Tuomas uusheimo

Oodi Central Library

Architect: ALA Architects
Date: 2018
Location: Helsinki, Finland
Uses: Library, movie-theatre, recording studio, makerspace, cafe/restaurant, event space.

Public sector delivered civic building and library with the vast majority of space dedicated to public amenities, including a cinema, cafe/restaurant, recording studios, a maker space, and areas for hosting exhibitions and events

The sitting of Oodi, opposite the Eduskuntatalo, was chosen to be symbolic of the relationship between the government and the population, and acts as a reminder of the Finnish Library Act's mandate for libraries, to promote lifelong learning, active citizenship, democracy, and freedom of expression.

The design divides the functions of the library into three distinct levels: an active ground floor that extends the town square into an interior space; "book heaven" on the upper level; and an enclosed in-between volume containing rooms to accommodate additional services and facilities within the library.

By reducing on-site storage and consulting library-users on how they access culture, the designers and librarians of Oodi have been able to introduce facilities, including a café, restaurant, public balcony, movie theatre, audio-visual recording studios and a makerspace. This is representative of broader experimentation within Finnish libraries to offer new services, in addition to loaning books.

Key lessons

— Ground floor as an extension of the plaza with a covered space that can be used for outdoor events.
— Combining 'traditional' library and community centre, very few books but large reading room, civic and community uses.

https://www.oodihelsinki.fi/en/

4. Walworth Town Hall, London

Walworth Town Hall

Architect:	Feix & Merlin
Date:	Ongoing
Location:	Elephant & Castle. London
Uses:	Workspace, cafes, walk-in community space, event space.

The Walworth Town Hall project is partnership between Southwark Council and General Projects, to create a new mixed use commercial, cultural and community space, bringing a derelict heritage asset back into use.

The 50,000 sq ft Town Hall and adjoining Newington Library will be re-purposed to house workspaces for independent creatives. The new central atrium will become the active soul of the building, providing ideal collision and collaboration space, while a new entrance at Walworth Square will provide a connection to neighbours. A new healthy café and co-working space will anchor the building to its surroundings.

The project revolves around the creation of a community hub, a free-to-use, purpose-built community space that can host events, seminars and leisure activities curated by the local community, for the local community.

Key lessons

— Partnership approach reduces risk and cost to public sector. Innovative mix of uses. Partner selected through competitive process.

https://walworthtownhall.com

4. Bikinihaus, Berlin

© Bikini Berlin


© SAQ Berlin

Bikinihaus

Architect: Hild and K Architects
Date: 2014
Location: Berlin
Uses: Independent retail, restaurant/cafes/ bar, exhibition spaces.

Transformation of a wholesale building into a concept mall, including independent boutiques, concepts shops, restaurants/bars as well as space for pop-up exhibitions and retail showcasing.

In 1997, the whole of Bikini Berlin was declared a listed building ensemble. The revitalisation was completed in 2013. The name BIKINI BERLIN is a reference to the architectural history of the complex and emphasises its position as a fashion hub and hive of cultural activity – just like in the past.

The building complex consists of the Zoo Palast cinema, the large high-rise and the small high-rise, the car park and of course the central Bikini building, the namesake of the entire ensemble, with the popular rooftop terrace that offers views into the zoo below.

Bikini Berlin is now a combination of shopping, gastronomy, workspaces, cinema, leisure, recreation and hotel. The concept shopping mall is also home to the modular pop-up boxes, which can be rented temporarily. 7000 m², freely accessible green rooftop terrace, the Bikini Berlin Shopping Garden, which is based on New York's Highline Park and offers views into the neighbouring zoo. Office spaces can also be found on the third to sixth floors of the Bikinihaus.

Key lessons
— Curated retail, no retail chains.
— Combines longer term units with pop up short term units.
— Large focus on exhibition/retail showcase
— Generous public realm, opened in the evening 'until 22pm.

https://www.bikiniberlin.de/en/about/

4. The LocHal, Tilburg

© Stijn Bollaert

© Stijn Bollaert

LocHal

Architect: CIVIC architects + Braaksma & Roos + Inside Outside + Mecano
Date: 2018
Location: Tilburg, Netherlands
Uses: Covered public space, informal co-working space, library, exhibition space, cafe.

The LocHal is a urban living room located next to the station, in the heart of Tilburg's new City Campus, and houses the Midden-Brabant Library, the cultural institutions Kunstloc and Brabant, and the co-working spaces of Seats2meet. The LocHal is a space for both young and old to read, learn, study, meet and gather.

The building acts as a covered public space, housing amenities shared by the library, arts organisations and co-working facilities. In addition to areas for lectures and public events, the building has a number of 'labs' where visitors can learn new skills.

The entrance hall takes on the form of a covered city square with large reading tables (doubling as podia), an exhibition area and a coffee kiosk. Space folds up into broad steps which can be used by individuals or as event seating for over one thousand spectators.

Key lessons

— To make the building as welcoming and accessible as possible, the entrance hall is conceived as a covered city square.
— As well as a reading space, the building also functions as a meeting place for events organised by partners, and it hosts a co-working company.
— Regeneration of the space through non 'retail-led' development.

https://www.mecanoo.nl/Projects/project/221/LocHal-Library?t=1

4. Ballston Quarter, Arlington

© Cooper Carry


© Cooper Carry

Ballston Quarter

Architect: Cooper Carry, CRTKL
Date: 2019
Location: Arlington. Virginia. US
Uses: Retail, leisure, pop-ups, food market.

Refurbishment of existing shopping hall to provide a food hall, including brick-and-mortar versions of mobile kitchens from around the area and pop-up/ incubator retail spaces

Ballston Quarter first opened in 1951. It was one of the first major suburban shopping centers in the Washington DC metropolitan area. It was the first shopping center built around a multi-story parking garage in the United States.

While the new development has a handful of local, regional and national retailers, the majority of the space is leased to restaurants and other places to eat, as well as places to do some other activity, possibly while eating.

The project didn't just take a mall and turn it inside out. It changed it into something else entirely, something more along the lines of an entertainment district.

Key lessons

— Diversification of uses and new focus on food/ drink and leisure.
— Curated programme of events (cooking and fitness classes, live-music).

https://ballstonquarter.com

4. Central Parade, London

© Dirk Lindner

© Dirk Lindner

Central Parade

Architect: Gort Scott
Date: 2016
Location: London
Uses: Mix of retail, co-working, studio spaces & bakery-cafe with events and workshop space.

Central Parade is a mixed use creative hub, including a variety of retail, co-working, studio and exhibition space and a bakery-cafe where events and workshops take place.

The transformation of this former council direct centre was funded jointly by the London Borough of Waltham Forest and the Greater London Authority's High Street Fund and designed by Gort Scott Architects.

Operated by Meanwhile Space CIC, the project strives to unlock Walthamstow's potential as a thriving cultural town centre, supporting multiple creative disciplines and businesses to co-locate, share resources, learn and collaborate. The interim use of this council-owned building actively engages the local community and animates the high street, offering a diverse cultural programme throughout the week and into the evening.

Key lessons

— Interim use of council assets to reinject life in the high street and provide affordable workspaces and community spaces.

https://www.centralparade.com

4. Croydon Arts Store (CAS), London

© Tim Bowditc

© Tim Bowditcs

Croydon Arts Store

Date: 2017-today
Location: Croydon, London
Uses: Multi-level network of parks and gardens with integrated, retro-fitted kiosks and pavilions with bespoke retail, F&B, public services.

In collaboration with local and neighbouring art organisations, the Whitgift Centre has become home to the Croydon Art Store (CAS). The store has temporarily taken over a four story unit and transformed it into an arts and cultural venue. The space was taken over with the support of the Croydon Partnership.

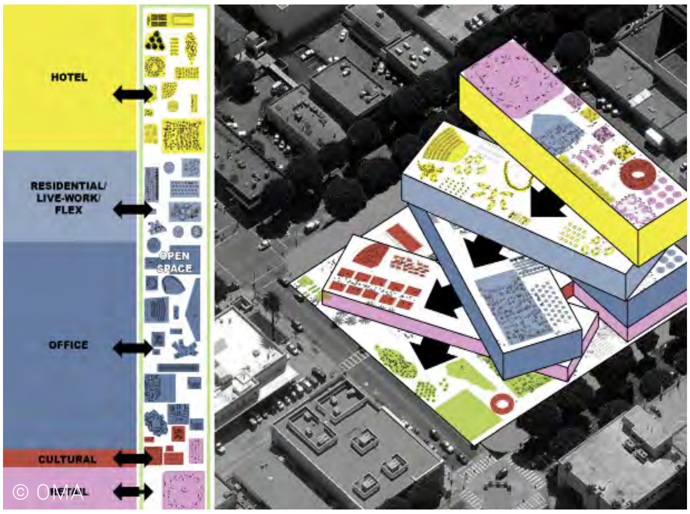
Croydon Arts Store provides affordable studio space for artists, arts workshops and activities. There is also a gallery space to exhibit work from local artists, a free bookable creative event space, and a research space to develop a Croydon biannual art exhibition with Kingston School of Art.

Croydon Arts Store hosts events with a focus on youth engagement. It acts as an action research space to test the role of arts and culture in a shopping centre, and aims to inform how the visual arts can be integrated in to future developments in Croydon.

Key lessons
— Innovative approach to test new uses within shopping centre
— Increasing arts participation amongst young people

http://turf-projects.com/croydon-arts-store/

4. The Plaza at Santa Monica



Croydon Arts Store

Architect: OMA
Date: In the pipeline
Location: Santa Monica, USA
Uses: Multi-level network of parks and gardens with integrated, retro-fitted kiosks and pavilions with bespoke retail, F&B, public services.

The Plaza at Santa Monica will be a dynamic, mixed use development that encompasses civic plaza, cultural venue, retail, residences, offices and a boutique hotel in the heart of downtown Santa Monica. The stepped development will fill an entire city block which is currently occupied by a car park and a public ice rink, which will be retained.

OMA's ambition is to contribute to Santa Monica's diverse network of public spaces and provides residents, tourists, and entrepreneurs a dynamic new public realm - a stepped building that achieves a strong interaction between interior program and exterior environments.

The building will contain a very diverse mix of uses, from shops and offices to apartments and a hotel. There will also be a hub for tech businesses while the open terraces atop each block will be given over to gardens, markets and venues for events. The building will also integrate a ground level plaza and elevated terraces that provide programmable open spaces capable of hosting a wide range of outdoor programming, including a market galleria and the existing public ice rink. The project will also provide pedestrian improvements such as wide sidewalks, bike lanes, landscaping, street furniture and additional public parking.

Key lessons

— Large scale mixed-used building incorporating outdoor programming space.

https://theplazaatsantamonica.com

4. The Commons’
Bangkok

The Commons’

Architect: Department of Architecture
Date: 2016
Location: Bangkok, Thailand
Uses: Multi-level network of parks and gardens with integrated, retro-fitted kiosks and pavilions with bespoke retail, F&B, public services.

The Commons’ is a small retail-led development located in Bangkok city centre which attempt to create an active outdoor-indoor public space, where people can comfortably enjoy it at anytime of the year.

‘The Commons’ proposes a vertical open-air public space folding upward as a backbone of the building. It starts with ‘the Ground’, which is a landscape of steps and ramps integrated with platforms, seatings, planting and small kiosks. ‘The Ground’ vertically opens up through large voids on the upper floors, connecting to shops, restaurants and community facilities, as well as further public and green spaces on upper levels. It is a place for strolling and relaxing at any time and in any seasons.

The Commons’ features a food market and Top Yard area where visitors can plant their own produce. The aim is to create a mall that is embedded in the local community. Visitors can take part in workshops, talks and music and community art projects, which are spread across the minimalist, multi-storey building. In addition to its communal areas, the store features artisan cafés, restaurants, bars, a children’s play area and a yoga studio.

The wide ‘Ground’, with its gradual series of steps and platforms connecting the street level to the second floor, naturally draws people to walk up leisurely. Shops on the upper levels are clearly seen from different angles from ‘the Ground’.

Key lessons
— Outdoor and semi-outdoor public spaces connecting the street level to the upper floors drawing people to walk up leisurely.

https://www.thecommonsbkk.com/thonglor

4. Off-White store, Miami


© off_white_miami


© off_white_miami

Off-White Store, Miami

Architect:	AMO & Virgil Abloh
Date:	2020
Location:	Miami
Uses:	Flexible retail/event space.

Fashion designer Virgil Abloh and AMO director Samir Bantal have designed the Off-White flagship fashion store in Miami Design District to be a fulfilment centre and a multipurpose events space.

The store has been designed to rethink how physical shops should operate amid the growing popularity of digital shopping. The idea is that the store is flexible and able to host a variety of activities, like art and music events, and talks.

The two-storey store is fronted with an opaque polycarbonate wall on the ground floor that can be pushed back, squeezing the storage of the apparel to the rear and opening the front to the street. The retail element is compressed at the back of the store while the space in front of the facade is completely open and free and can be used for any function.

Key lessons

— Retail space designed to allow for uses beyond retail trade.

https://www.dezeen.com/2020/08/12/off-white-miami-design-district-flagship-virgil-abloh-amo/

5. The Bentway, Toronto


© Nic Lehoux


© Nic Lehoux

The Bentway

Architect:	Public Work
Date:	2018
Location:	Gardiner Expressway, Toronto
Uses:	Pedestrian/cycle artery, public and event spaces.

Transformation of a 1.75km space beneath the express-way reinvigorates the area into a vital artery for pedestrians and cyclists.

The initial phase – from Strachan Avenue to Bathurst Street – stitches together seven neighbourhoods, expanding access to key areas, such as the Fort York National Historic Site, and creating a new gathering place for Toronto's growing population.

The project serves as an example of how the re-use of infrastructure can support new forms of public life. The Bentway fuses public space design and programming to create a pioneering urban landscape, conceived to support new platforms for creative expression and public experience, and based upon the notion of 'what can only happen here'. Extensive public consultation with neighbours and an array of potential user groups from across the city informed the vision for the design of the physical environment, as well as the programming approach.

The intervention re-imagines the express-way – arguably the city's most divisive symbol of 20th Century's transportation planning – as a new model of shared public space, with an open-air amphitheatre complete with wash-rooms and a green room, bleachers to seat about 250 and the 220-metre skate trail.

Key lessons
— Example of how the re-use of existing structures can support new forms of public life.
— Model of shared public space activated by year-round programming.
— Public consultation informed the design of the physical environment as well as the programming.

https://www.thebentway.ca
https://www.dezeen.com/2019/03/08/bentway-park-public-work-greenberg-toronto/

5. Seoullo/ Skygarden, Seoul


© MRDV


© MRDV

Seoullo/Skygarden

Architect: MVRDV
Date: 2017
Location: Seoul
Uses: Multi-level network of parks and gardens with integrated, retro-fitted kiosks and pavilions with bespoke retail, F&B, public services.

The Skygarden is a 983-meter elevated walkway which utilises a formerly abandoned highway in the centre of the South Korean capital. Located in Seoul's Central Station district, the 16-meter high linear park features a living catalog of Korea's indigenous plants featuring over 24,000 individual plants from 228 species.

The Skygarden is known in Korean as Seoullo 7017, a name which references the Korean for "Seoul Street," and the 1970 and 2017, the years in which the structure was originally built and subsequently transformed. The key challenge was to change the infrastructure into a green symbol and the municipality and the architects were deeply committed to accommodating the biggest diversity of flora into a strictly urban condition.

While the park itself is the main attraction, the renovation of the former highway also incorporates shops, galleries, tea houses, a theatre, information centre, maintenance boots and restaurants. At night, the park is lit up in blue light, a colour which can help make plants healthier, however the colour of the light can also be adjusted for events and festivals. Multiple stairs, elevators, and ramps onto the structure, some adapted from the on-ramps built for the original highway, help the new park to connect together different parts of the area, improving the experience pedestrian for pedestrian users of the city.

Key lessons

— Integrate biodiversity to a strictly urban condition.
— The park as a connecting destination.

http://seoullo7017.co.kr

6. Brooklyn Navy Yard & New Lab, New York

© Deezen

© Marvel Architects and Macro Sea

Brooklyn Navy Yard / New Lab

Architect: Marvel Architects
Date: 2016
Location: Brooklyn, New York
Uses: Green tech and advanced manufacturing hub.

The Brooklyn Navy Yard (BNY) is a former industrial and military park which was progressively abandoned in the 20th century, only to reappear as a new hub for green tech, food and other advanced manufacturing in the late 2000s. It is a center of manufacturing and workforce innovation, managed by a not-for-profit corporation serving as the real estate developer and property manager. The BNY serves as an urban and place-based collective entrepreneurship model wherein multiple organisations are engaged in collaborative entreprising, creating a complex and open-ended network with a social change orientation.

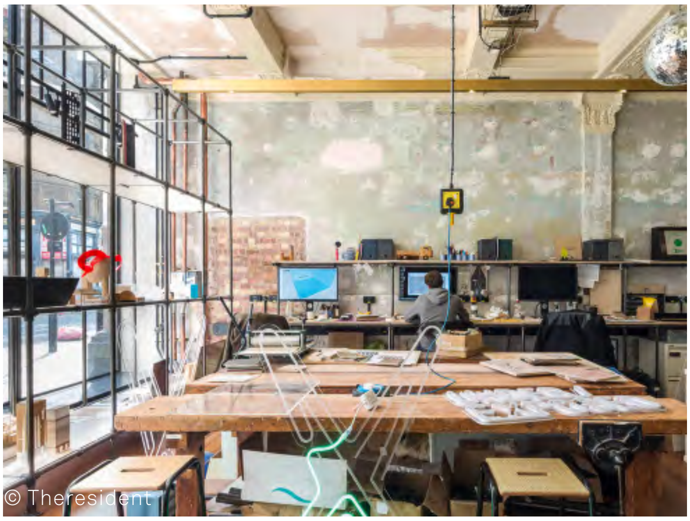
Key organisations from the public, private, social and academic sectors are jointly engaged in interactions, allocations their respective skills and resources to act on their environment and developing new solutions together, co-creating social value collectively.

New Lab opened in June 2016, as a multi-disciplinary technology center. Housed in Building 128 of the Brooklyn Navy Yard, the project serves as a hardware-focused shared workspace, research lab, and hatchery for socially-oriented tech manufacturing. New Lab's open floor design was intended, spatially, to reinforce its mission, the layout meant to encourage member companies to collaborate and cross-pollinate ideas. Communal meeting rooms, office pods, and interior plazas on both floors emphasize the developer's intention to create a collaborative design and fabrication center.

Key lessons
- Collaborative tech hub dedicated to entrepreneurs working on scalable technologies and products.
- Curated and specialist uses, strong vision and collaborative approach.

https://brooklynnavyyard.org
https://newlab.com

6. The Department Store, London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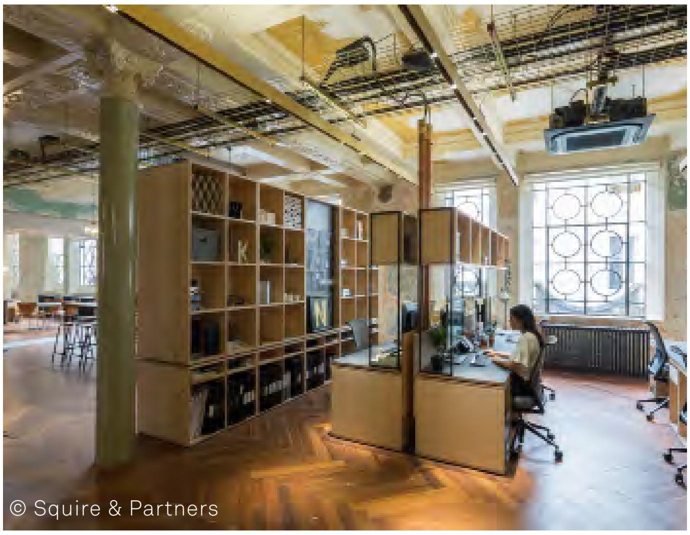

© Squire & Partners

The Department Store

Architect: Squire & Partners
Date: 2017
Location: Brixton. London
Uses: Flexible workspaces, niche retail and bar/restaurant.

Former Edwardian department store re-imagined as spaces for design disciplines and creative and retail units.

Collaborating with craftspeople and furniture makers, the restored building provides an array of spaces for design disciplines.

There are monthly talks throughout the year connect local businesses to each other and projects involving neighbourhood schools are already well established. Squire & Partners' in-house modelshop reveals the process of experiment and making within the office, which can be seen from the street.

Key lessons

— The design re-activates the street level through animation and display
— Office workspaces celebrate the process of craft and making

https://thedepartmentstore.com

6. Liverpool Media Academy, Liverpool

Liverpool Media Academy

Architect: K2 Architects
Date: Ongoing
Location: Met Quarter. Liverpool
Uses: Education/learning uses within shopping mall.

A planning application have been submitted to turn the upper floors of the shopping centre Metquarter into a media and arts-focused college. The retail units will provide recording studios, rehearsing spaces, classrooms and common areas for students.

The city centre shopping destination opened less than 15 years ago, but hasn't performed well. The ground floor units would however still be used by retail traders and businesses.

Key lessons
— Re-purposing retail units of struggling shipping centre.
— Use of mezzanine level only.
— Future opportunities for showcasing and events.

7. Atlanta Innovation District - Midtown


© Perkins and Will

Atlanta experienced 20 years of flight from the city centre. An innovation district approach helped to bring companies back to the centre of the city.

Key lessons

— Key focus is given to international investment and spin outs from Georgia Tech and its success has, in part, been attributed to the 'placemaking' approach taken: tree lined streets, public spaces and good transport links.

https://www.midtownatl.com/_files/docs/only-in-midtown---district-profile-2018.pdf

Atlanta Innovation District (Midtown)

Date: 2015-today

8. Renew Newcastle

Renew Newcastle

Date: 2018-ongoing
Location: Newcastle, France

Renew Newcastle is a not-for-profit company limited by guarantee. Since 2008, Renew Newcastle has been connecting people with vacant spaces, supporting a community of creative entrepreneurs who bring life, interest and activity into underutilised neighbourhoods. Partnering with those who share the vision of giving back to their community.

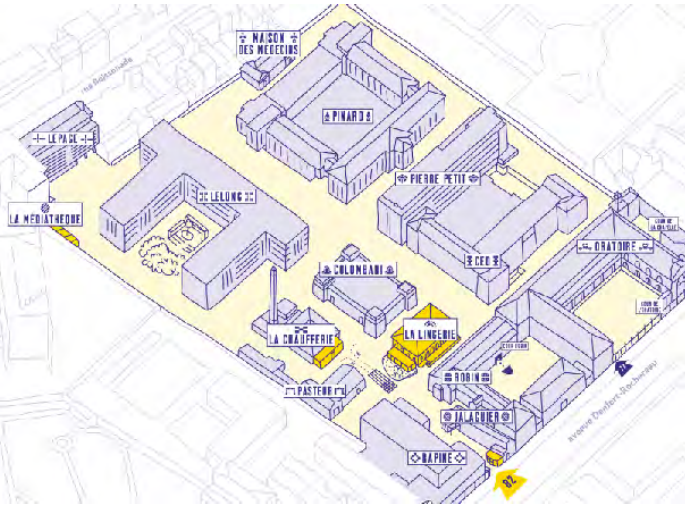
Renew Newcastle supports the property owner to the maximum extent possible to ensure that their involvement is tax effective and their contribution is seen a positive contribution to the community. Renew Newcastle then finds “custodians” who use the buildings for cultural, creative and community purposes until the owner finds a permanent tenant or a redevelopment is ready to proceed.

Filling these empty spaces has created a series of positive benefits. Reducing crime, graffiti, vandalism and giving a significant economic and social value back to the community that has attracted business and residential interest in the city.

Key lessons
— Supporting meanwhile uses and entrepreneurship.
— Viable strategy to revitalise the condition of the contemporary cities.

https://renewnewcastle.org

8. Les Grands Voisins, Plateau urbain, Paris



Les Grands Voisins, Plateau Urbain

Architect:	Plateau Urbain
Date:	2015
Location:	Paris

Plateau Urbain, an association created in 2013 and recently transformed into a cooperative, aims to support creation. By allowing temporary occupancy, at the price of the costs of buildings and vacant surfaces, Plateau Urbain aims to revive them in the short term and to allow young companies, associations and artists to concentrate their resources on the development of their activities and not on high rent, with a view to enhancing the value of existing resources.

Les Grands Voisins created a new piece of city in an empty hospital, and shows that meanwhile activity can successfully take over large urban sites, when bigger organisations enter the meanwhile sector. The buildings of a Parisian hospital were turned into temporary homeless accommodation for 600 people, low-cost workspace for 250 entrepreneurs, three restaurants and bars catering for 1,000 visitors a day, an events space, and a welcome centre for refugees. It allowed small businesses, charities and artists access cheap rent in central locations while benefitting the property owner at the same time through saving money via security, overheads and maintenance.

Key lessons

— Temporary use real estate cooperative, which creates ecosystems of work by reactivating empty sites into ateliers, makerspaces and coworking spaces for charities, entrepreneurs and artists.

— Effective strategy for community engagement and positive impact on the wider area.

https://www.plateau-urbain.com
https://agile-city.com/agile-city-research/les-grands-voisins-temporary-use-vacant-buildings-paris/

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