

# Town Centre and Retail Study

**ON BEHALF OF CROYDON COUNCIL**

November 2023

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# 0 Executive Summary

## Purpose

- 0.1 This Town Centre and Retail Study has been commissioned by Croydon Council. The Study has been led and co-ordinated by Nexus Planning, with specialist input from NEMS Market Research on the empirical survey work and Experian on data production. The purpose of the Study is to inform preparation of the Partial Review of the Croydon Local Plan for the period up to 2040. It aims to provide the Council with an up-to-date, objective assessment of retail and leisure development needs in the Council area and considers possible strategic policy responses to any prevalent or emerging issues. The Study has been prepared to reflect the requirements of the National Planning Policy Framework (NPPF) 2023, Planning Practice Guidance (PPG), the London Plan (2021) and the Use Classes Order (2020 amendments).

## Analysis

- 0.2 The Study starts by summarising the key current and future retail trends. The current economic circumstances arising from the Covid-19 pandemic, Brexit and the conflict in Ukraine cause the retail and leisure market to continue to be somewhat unstable. Sluggish expansion in household incomes and tepid consumer confidence mean a limited ability or appetite for consumer spending across retail goods and leisure activities. In the meantime, the rise in internet retailing has been accelerated and has clear implications on the viability of 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete, with omni-channel retailing increasingly becoming the norm across the industry. Investing in the consumer experience is anticipated to be key to securing resiliency in retail stores moving forward. Planning policy plays an important role in helping to future-proof town centres against ongoing uncertainty.
- 0.3 The Study also provides detailed health check assessments for Croydon Metropolitan Centre and the Borough's nine Town Centres. Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.
- 0.4 The Study then goes on to review existing market shares across the Study Area, as informed by a telephone Household Survey which comprised 800 interviews split between 8 postcode Zones. Overall, the Study summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations. We also examine the level of take-up for various leisure activities and any locally identified deficiencies in provision.

## Key Findings

- 0.5 The capacity analysis indicates that, even taking the advisory approach of looking to the short-term, there is capacity for between 5,033 and 6,891 sq m of net convenience floorspace over the period to 2029. However, this capacity is largely generated by the over-trade of existing foodstores within the town centres of the Borough. Therefore, any future development needs to be treated with care as, in principle, over-trading town centre foodstores are key to putting 'town centres first'. The Study discusses this matter in more detail in its recommendations.
- 0.6 Turning to comparison goods, it is evident that macro-economic conditions in general, and retail trends towards online shopping have re-shaped the viability of the sector. As a result, the forecasts show very limited floorspace capacity in the early part of the Plan period, with more significant capacity only arising over the period beyond 2029. On this basis, we do not recommend that the Council seeks to allocate any floorspace for additional comparison goods over the short-term, and instead formulates a policy base on which to preserve and enhance existing floorspace in its town centres and any planned activity under the Purley Way Transformation Area.

## Recommendations

- 0.7 The Study concludes by providing guidance to inform the Partial Review of the Local Plan on a number of matters. Specifically, the Study considers the general direction for retail and leisure capacity over the Plan period, as well as assessing the retail hierarchy with the context of the Study findings (no significant changes are recommended). There is also consideration in respect of two key local issues:
- The anticipated closure of Box Park in 2027 and the likely associated impacts on Croydon Metropolitan Centre; and
  - the future implications for delivery of the Purley Way Transformation Area and how that area might influence the future retail hierarchy and the anticipated growth of retail and service goods provision in the coming years.

# 1. Introduction

## Overview

- 1.1 This Town Centre and Retail Study has been commissioned by Croydon Council ('the Council'). The preparation of the Study has been led and co-ordinated by Nexus Planning ('Nexus').
- 1.2 The purpose of the Study is to inform preparation of the Partial Review of the Local Plan. It aims to provide the Council with an up-to-date, objective assessment of the health of centres in the Council area and considers possible strategic policy responses to prevalent and emerging issues.
- 1.3 The Study has been prepared to reflect the requirements of the National Planning Policy Framework (the 'NPPF') (published 5 September 2023), the Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') (published 16 September 2020), General Development Order (2021) and the Use Class Order (2020 Amendments).

## Structure of the Study

- 1.4 This report is structured as follows:
- The report is prefaced with an executive summary, providing an overview of the key takeaways of the report.
  - Section 1 introduces the report, and the structure it follows.
  - Section 2 provides a summary of the key national and local retail policy context relevant to the Study.
  - Section 3 summarises key current and future retail trends and, in doing so, provides the overarching context for this Study and how it can be used to guide plan-making.
  - Section 4 describes our health-check methodology.
  - Sections 5 to 14 set out our health-check assessments for Croydon Metropolitan Centre, and the nine District Centres;
  - Section 15 discusses the results of the Household Telephone Survey and sets out Market Shares and forecast Capacity for convenience and comparison goods retail, as well as a range of commercial leisure activities; and
  - Section 16 provides recommendations and advice to inform the Partial Review of the Local Plan on a range of matters.

## 2. Policy and Legislative Context

2.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and Town Centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering retail and Town Centre development plan policy as set out in The London Plan (2021) and the Croydon Local Plan (2018). We also consider changes to the Use Classes Order that came into force in April 2021 and the application of permitted development rights to Town Centre uses that came into force in August 2021.

### Revised National Planning Policy Framework

2.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in September 2023. The NPPF reflects the fact that the traditional role of Town Centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of Town Centres.

2.3 NPPF policies are considered on a thematic basis below.

#### Plan-Making

2.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

#### Building a Strong, Competitive Economy

2.5 Paragraph 81 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand, and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

#### Ensuring the Vitality of Town Centres

2.6 Paragraph 86 specifically relates to planning for Town Centres. It states that:

'Planning policies should:

- define a network and hierarchy of Town Centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of Town Centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in Town Centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main Town Centre uses over this period should not be compromised by limited site availability, so Town Centre boundaries should be kept under review where necessary;

- where suitable and viable Town Centre sites are not available for main Town Centre uses, allocate appropriate edge of centre sites that are well connected to the Town Centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the Town Centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites’.

2.7 The requirement to plan to meet needs across a minimum ten-year period represents a change from the previous NPPF which required Town Centre needs to be met in full across the entire plan period.

2.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to omit the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use change.

2.9 Paragraph 90 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main Town Centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

### Promoting Healthy and Safe Communities

2.10 Paragraph 93 seeks to support the social, recreational and cultural facilities and services communities need. The guidance states that planning policies and decisions should:

- plan positively for the provision and use of shared spaced, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community’s ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

### Ensuring the Vitality of Town Centres Planning Practice Guidance

2.11 The Town Centres and Retail Planning Practice Guidance (‘the Town Centres PPG’) was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and Town Centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the Government’s

aspiration to support Town Centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

2.12 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their Town Centres should include:

- The realistic role, function and hierarchy of Town Centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each Town Centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the Town Centre to accommodate the scale of assessed need for main Town Centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of Town Centre locations, including improvements to transport links in and around Town Centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the Town Centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing Town Centres, including opportunities to conserve and enhance the historic environment.

2.13 This study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Councils' future development plan policy. The Study will also help underpin any future Town Centre-specific strategies or masterplans.

2.14 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Sections 4 to 14 of this report (which specifically addresses the vitality and viability of the principal centres in the Croydon Council area).

### Use Classes Order

2.15 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

2.16 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within Town Centres without the need for planning permission.



2.17 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and, offices.
- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sqm and where there is no other such facility within 1,000 metres radius of the shop’s location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now include a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; as a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.

2.18 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to significant change the commercial use of premises without planning permission allows centres to evolve in a flexible manner.

2.19 However, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both Town Centres and out of centre locations, and there may be unintended consequences in providing for additional flexibility across Class E outside of Town Centres. Accordingly, it may be appropriate for the Council to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

### Town Centre Use Permitted Development Rights

2.20 An amendment was made to the General Permitted Development) (England) Order 2015 (the ‘GPDO’) in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, ‘prior approval’ for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries, as well as in areas that are covered by an Article 4 direction.

### Local Planning Policy Context

2.21 The statutory development plan for the London Borough of Croydon comprises: The London Plan (2021), the Croydon Local Plan (2018) and the South London Waste Plan (2022).

#### The London Plan (2021)

2.22 The London Plan is a statutory spatial development strategy for the Greater London Area that is written on behalf of the Mayor of London and published by the Greater London Authority. The London Plan was first published in February 2004,

and since then there have been four further publications of the plan, coinciding with the change of London Mayor's. The London Plan (2021) holds weight alongside the Croydon Local Plan (2018) when considering development proposals in Croydon.

2.23 The London Plan is underpinned by the concept of Good Growth, growth that is socially and economically inclusive and environmentally sustainable. The Good Growth objectives are set out in chapter one of the document, and include:

1. GG1 Building strong and inclusive communities
2. GG2 Making the best use of land
3. GG3 Creating a healthy city
4. GG4 Delivering the homes Londoners need
5. GG5 Growing a good economy
6. GG6 Increasing efficiency and resilience

2.24 Of relevance to town centres in London, Criterion F of Policy GG1 Building strong and inclusive communities states that those involved in planning and development must promote the crucial role town centres have in the social, civic, cultural and economic lives of Londoners, and plan for places that provide important opportunities for building relationships during the daytime, evening and night-time.

2.25 Looking to the wider plan, criterion A of Policy SD6 Town centres and high streets sets out how the vitality and viability of London's varied town centres should be promoted and enhanced. This should be done by:

1. Encouraging strong, resilient, accessible and inclusive hubs with a diverse range of uses that meet the needs of Londoners, including main town centre uses, night-time economy, civic, community, social and residential uses.
2. Identifying locations for mixed-use or housing-led intensification to optimise residential growth potential, securing a high-quality environment and complementing local character and heritage assets.
3. Delivering sustainable access to a competitive range of services and activities, by walking, cycling and public transport.
4. Strengthening the role of town centres as a main focus for Londoners' sense of place and local identity in the capital.
5. Ensuring town centres are the primary locations for commercial activity beyond the CAZ and important contributors to the local as well as London-wide economy.
6. Supporting the role of town centre in building sustainable, healthy and walkable neighbourhoods with the Healthy Streets Approach embedded in their development and management.

2.26 The further criteria of Policy SD6 specify the following:

- a. Details that the adaptation and diversification of town centres should be supported in response to the challenges and opportunities represented by multi-channel shopping and changes in technology and consumer behaviour, including improved management of servicing and deliveries.
- b. Seeks for the potential for new housing within and on the edges of town centres should be realised through mixed-use or residential that makes best use of land, capitalising on the availability of services within walking and cycling distance and their current and future accessibility by public transport.
- c. The particular suitability of town centres to accommodate a diverse range of housing should also be considered and encouraged.
- d. The redevelopment, change of use and intensification of identified surplus office space to other uses including housing is supported.
- e. The management of daytime, evening and night-time activities to enhance the town centre vitality and viability.
- f. Tourist infrastructure, attractions and hotels in town centre locations, especially in outer London should be enhanced and promoted.
- g. The delivery of a barrier-free and inclusive town centre environment that meets the needs of all Londoners, including disabled and older Londoners and families with young children, should be provided. This may include Shopmobility schemes, the provision of suitably designed crossing points, dropped kerbs and tactile paving, seating and public toilets.
- h. The varied role of London's high streets should be supported and enhanced.
- i. The provision of social infrastructure should be enhanced, particularly where it is necessary to support identified need from town centre and local residents, and facilities should be located in places that maximise footfall to surrounding town centre uses.
- j. Safety and security should be improved, and active street frontages should be secured in new development, including where there are ground floor residential frontages.

2.27 Policy SD7 Town centres: Development principles and Development Plan Documents calls for boroughs to take a town centres first approach when considering development proposals, discouraging out-of-centre development of main town centre uses. The policy details what borough wide development plans should do to achieve this, before concluding with what development proposals should to achieve the policies aim.

2.28 Policy SD8 Town centre network identifies that the changing roles of town centres should be proactively managed in relation to the town centre network as a whole. This process should support sustainable economic growth across the Greater London boundary to enhance the vitality and viability of London's centres and complement those in the Wider South East.

2.29 Policy SD8 further details that:

- a. Identified deficiencies in the London town centre network can be addressed by promoting centres to function at a higher level in the network, designating new centres or reassessing town centre boundaries.

- b. The classification of International, Metropolitan and Major town centres can only be changed through the London Plan. Changes to District, Local, Neighbourhood centres and CAZ Retail Clusters can be brought forward through Local Plans where supported by evidence in development capacity assessments and town centre health checks and subject to assessments of retail impact where appropriate.
- c. International, Metropolitan and Major town centres should be the focus for the majority of higher order comparison goods retailing, whilst securing opportunities for higher density employment, leisure and residential development in a high-quality environment.
- d. District centres should focus on the consolidation of a viable range of functions, particularly convenience retailing, leisure, social infrastructure, local employment and workspace, whilst addressing the challenges of new forms of retailing and securing opportunities to realise their potential for higher density mixed-use residential development and improvements to their environment.
- e. Local and neighbourhood centres should focus on providing convenient and attractive access by walking and cycling to local goods and services needed on a day-to-day basis.
- f. Boroughs and other stakeholders should have regard to the broad policy guidelines for individual town centres, including:
  - Indicative growth potential (commercial and residential)
  - Centres associated with the Areas for Regeneration
  - Night-time economy roles
  - Viable office locations including those with strategic office development potential and/or need to retail existing office functions in light of office to residential permitted development rights

2.30 Policy SD9 Town centres: Local partnerships and implementation sets out that strategic and local partnership approaches should be supported and encouraged to develop strong, resilient and adaptable town centres, fulfilling their potential to accommodate growth and development. These partnerships may be in the form of town centre management, business associations, Neighbourhood Forums, trader associations and Business Improvement Districts, and should be inclusive and representative of the local community.

2.31 Policy SD9 further states that the development of Town Centre Strategies is encouraged, particularly for centres that are undergoing transformative change, have projected declining demand, have significant infrastructure planned or are identified as future potential centres.

2.32 Of importance, Policy SD9 requires regular town centre health checks to be undertaken to inform strategic and local policy implementation.

2.33 Finally, Policy SD9 details that Boroughs should:

1. Introduce targeted Article 4 Directions where appropriate and justified to remove permitted development rights for office, light industrial and retail to residential in order to sustain town centre vitality and viability and to maintain flexibility for more comprehensive approaches to town centre housing and mixed-use intensification

2. Take a proactive and partnership-based approach to bring sites forward for redevelopment, supporting land assembly in collaboration with local stakeholders including, where appropriate, through the compulsory purchase process
3. Consider the range of mechanisms to deliver housing intensification, mixed-use development and ongoing asset management such as town centre investment models and the contribution of specialist forms of housing investment.

2.34 Policy SD10 Strategic and local regeneration sets out that boroughs should:

1. Identify Strategic Areas for Regeneration in Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs
2. Seek to identify Local Areas for Regeneration taking into account local circumstances
3. Engage and collaborate with communities, particularly those in Strategic and Local Areas for Regeneration, at an early stage and throughout the development of local development documents, strategies and regeneration programmes

2.35 Policy SD10 further states that Development Plans, Opportunity Area Planning Frameworks and development proposals should contribute to regeneration by tackling inequalities and the environmental, economic and social barriers that affect the lives of people in the area, especially in Strategic and Local Areas for Regeneration.

2.36 At Annex 1 to the London plan, central Croydon is designated as a Metropolitan Centre. This is defined as a centre which *“serves a wide catchment which can extend over several boroughs and into parts of the Wider South East. Typically they contain at least 100,000 sqm of retail, leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions. Many have important clusters of civic, public and historic buildings”*.

2.37 Meanwhile, its nine District Centres listed at 2.39(b) are defined as being *“distributed more widely than Metropolitan and Major centres, providing convenience goods and services, and social infrastructure for more local communities and accessible by public transport, walking and cycling. Typically, they contain 5,000–50,000 sqm of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions”*.

### **The Croydon Local Plan (2018)**

2.38 The Croydon Local Plan (2018) contains strategic and detailed local land use and development policies for planning and development in Croydon. The Croydon Local Plans Spatial Vision has been informed by the ‘We are Croydon’ vision and Croydon’s Sustainable Community Strategy.

2.39 The sub-policies of Strategic Policy SP3: Employment largely focus on Town Centres. The policies include:

- SP3.6 highlights that the Council will apply the London Plan Town Centre hierarchy, which is:
  - a. Croydon Metropolitan Centre
  - b. District Centres: Addiscombe, Coulsdon, Crystal Palace, New Addington, Norbury, Purley, Selsdon, South Norwood and Thornton Heath

- c. Local Centres: Beulah Road, Brighton Road (Sanderstead Road), Brighton Road (Selsdon Road), Broad Green, Hamsey Green, Pollards Hill, Sanderstead, Shirley and Thornton Heath Pond.
- SP3.7 sets out that the Council will work with the GLA and neighbouring boroughs to ensure Croydon's network of town centres is sufficiently flexible to accommodate change up to 2031 by:
  - a. Working with its partners through the process of regular town centre 'health checks' to highlight reclassifications of the borough's existing Local and District Centres;
  - b. Designating the boundaries of the network of town centres and their Primary Shopping Areas in the Croydon Local Plan's Detailed Policies and Proposals and undertaking regular review to ensure the vitality of the centres is maintained; and
  - c. Considering the designation of new Local Centres at Fiveways and Valley Park when they can be supported by population growth in these areas.
- SP3.8 details how the Council will promote and support the development of all B1 uses (including office, light industry and research & development) retail, leisure (including evening/night-time economy uses), visitor accommodation, and housing and community facilities within Croydon Metropolitan Centre, District Centres and Local Centres.
- SP3.9 states that Croydon Metropolitan Centre will remain the principal location in the borough for office, retail, cultural (including a diverse evening/night-time economy) and hotel activity, and that it will be the largest retail and commercial centre in South London.
- SP3.10 indicates that the Council will adopt a flexible approach to B1 uses (office, light industry and research & development), retail, leisure (including evening/night-time economy uses), visitor accommodation, and housing and community facilities within Croydon Metropolitan Centre.
- SP3.11 states that the Council will promote and support measures to improve the quality of the borough's stock or retail and office premises, particularly in the Croydon Metropolitan Centre.
- SP3.12 favourably considers net increases to the stock of retail premises commensurate with Croydon's retail function as a Metropolitan Centre and seeks to ensure the viability and vitality of Croydon Metropolitan Centre, District Centre and Local Centres. The Council will seek to maintain as a minimum, the current amount of retail floor space in Croydon, enhance the quality of retail floor space in Croydon and seek to reduce A Use Class vacancy.
- SP3.13 states that the Council will promote and support the development of new and refurbished office floor space in Croydon Metropolitan Centre, particularly around East Croydon Station and within New Town, and the District Centres.
- SP3.14 considers opportunities for employment and skills training by means of a section 106 agreement for major developments (residential developments of 10 units or more or non-residential developments exceeding 1,000m<sup>2</sup>).

2.40 Policy DM4: Development in Croydon Metropolitan Centre, District and Local Centres states that the Council will ensure that the vitality and viability of Croydon Metropolitan Centre and the borough's District and Local Centres is maintained and increased by not permitting new developments or changes of use which would result in a net loss of ground floor Class A uses within Main Retail Frontages (unless it relates to the expansion of an existing community use).

- 2.41 Policy DM4 further states that within Croydon Metropolitan Centre and the Borough's District and Local Centres development proposals and changes of use on the ground floor must accord with the specified new development proposals and changes of use requirements. Outside of Main and Secondary Retail Frontages, but within centres, proposals for mixed use developments will be required to either:
- Demonstrate that a specific end user will be occupying the ground floor unit upon completion, or;
  - Provide a free fit out of all ground floor units for the eventual end occupier to ensure that the unit is capable of occupation and operation by the end user and that the ground floor units are capable of conversion to the same use as the remainder of the building if after two years, subsequent to completion, no end user has been found for the ground floor unit.
- 2.42 Policy DM5: Development in Neighbourhood Centres states that the Council will ensure that the vitality and viability of Neighbourhood Centres are maintained and enhanced and that they continue to provide a level of service of neighbourhood significance.
- 2.43 Policy DM6: Development in Shopping Parades suggests that Council will ensure that the vitality and viability of the borough's Shopping Parades is maintained and increased and that they continue to serve local communities by ensuring new development proposals and changes of use on the ground floor are in accordance with specific requirements.
- 2.44 Policy DM7: Development in Restaurant Quarter Parades states that the designated Restaurant Quarter Parades will ensure the vitality and viability is maintained and increased and that it continues to serve local communities by ensuring new development proposals and changes of use are in accordance with specific requirements.
- 2.45 Policy DM8: Development in edge of centre and out of centre locations seeks to ensure that the vitality and viability of the borough's town centres is maintained and increased by ensuring new development proposals for main town centre uses in edge of centre and out of centre locations are in accordance with specific requirements. Planning conditions should be applied to control the subdivision of units, extensions (including mezzanines) and the range and mix of convenience and comparison goods sold.

### **South London Waste Plan (2022)**

- 2.46 The South London Waste Plan sets out the spatial issues and objectives to be met in waste management for the next 10 years up to 2037. It is a joint development plan document (DPD) and covers the geographical area comprising the London Borough of Croydon, the Royal Borough of Kingston upon Thames, the London Borough of Merton and the London Borough of Sutton. It contains policies to guide the determination of planning applications for waste facilities and identifies existing waste sites to be safeguarded and areas where waste facility development may be suitable.

### **Emerging Policy**

- 2.47 Croydon Council are currently in the process of finalising a partial review of the Croydon Local Plan for Regulation 19 Publication. The review will update the vision and strategy for Croydon's growth up to 2040 and set out how the Council will continue to deliver much needed new homes, jobs, and community facilities.
- 2.48 The Council are also currently preparing a Supplementary Planning Document (SPD) to guide how an area in the Borough defined as the Purley Way can successfully undergo transformation and become a more attractive place for local residents and businesses. Consultation of the Purley Way Masterplan concluded in March 2021, however a final version of the document is yet to be published. Once Published, it will inform and feed into the partial review of the Croydon Local Plan.

## Summary

- 2.49 This section has considered the prevailing policies in respect of the retail and town centre uses at the national and local level. We examine a range of empirical evidence in the remaining sections of this Study before returning to policy matters in the final section where we will draw on those findings and recommend any additions or alterations to the emerging policies of the new Plan.



### 3. Current Retail and Leisure Trends

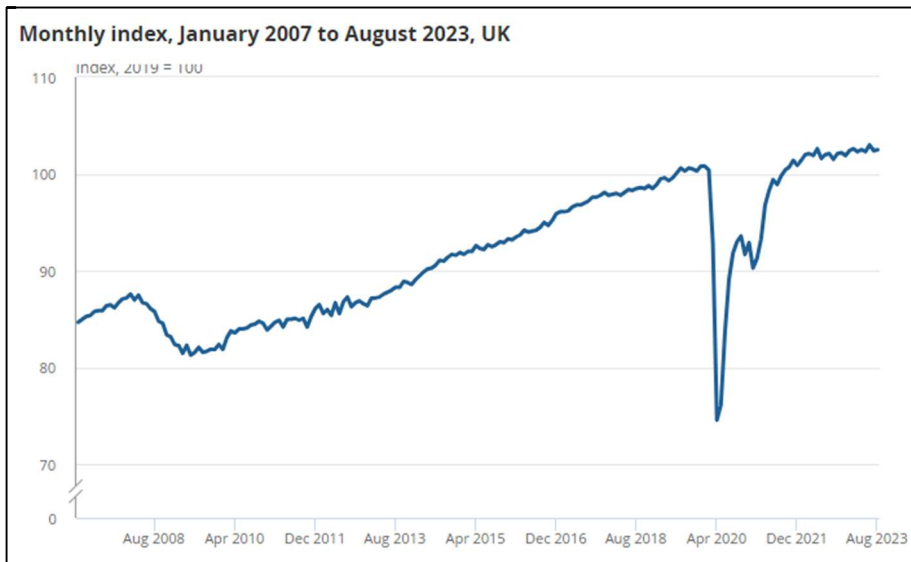
#### Introduction

3.1 We provide an overview of current retail and leisure trends for the UK and London below with some discussion of Croydon. The retail and leisure sectors are dynamic, and new retail and leisure formats continue to evolve to meet our everyday needs. The below commentary should therefore be taken as a ‘snapshot’ at the current time.

#### The Current State of the UK Economy

3.2 In recent years the UK economy has been greatly affected by commercial circumstances arising from the Covid-19 pandemic (‘lockdowns’ in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022). As a result, National Statistics (‘ONS’) figures indicate that UK GDP has seen dramatic changes whereby GDP index fell from 100.2 in February 2020 to 73.7 in April 2020, and eventually rising back in March 2022 to its pre-pandemic level<sup>1</sup>. Since then, the GDP index has remained reasonably level, with only mild fluctuations. This is shown in the image below.

Figure 3.2.1 UK GDP is estimated to have grown in August 2023



However, a deteriorating economic outlook – a combination of instability within UK government, soaring inflation reaching 7.9% in June 2023<sup>2</sup> (which is comfortably outpacing average earnings growth), tax rises, weak businesses investment, and the implications of the war in Ukraine - continues to prevail and the growth outlook for the UK continues to be volatile. In September 2022 it was predicted that the next two years would be characterised by slow, or even negative GDP growth, with the UK potentially entering a recession. However, in April 2023 it was reported that the UK economy is set to grow by 0.1% in 2023, and that it has avoided a technical recession<sup>3</sup>. The factors contributed to this include sustainably lower natural gas spot and future prices, a stronger Sterling and the better-than-expected managed re-opening of the Chinese economy<sup>4</sup>. The Bank of England has therefore forecast that inflation is over its peak whilst the Office for Budget

<sup>1</sup> [ONS, GDP monthly estimate, UK: August 2023](#)

<sup>2</sup> [Banks of England, 21 September 2023](#)

<sup>3</sup> [PWC, UK Economic Outlook April 2023](#)

<sup>4</sup> [PWC, UK Economic Outlook April 2023](#)

Responsibility forecasting in November 2023 for inflation to remain higher for longer, taking until the second quarter of 2025 to return to the 2% target, more than a year later than previously forecast in March 2023.<sup>56</sup>

## The Retail and Leisure Economy

- 3.3 The retail sector has endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since the 2007 recession<sup>7</sup>, with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping.

### UK Retail Sector

- 3.4 The industry leader in commercial real estate and analytics, CoStar's Retail National Report UK 2023 comments<sup>8</sup> are as follows:
- 3.5 *The retail sector is in recovery mode after a difficult pandemic, when multiple lockdowns and online competition caused the permanent closure of many shops and businesses. Net absorption of retail space turned sharply negative as a result, with shopping centres and less affluent towns most severely impacted. Supermarkets and discount retailers were among the few pockets of resilience from a demand perspective.*
- 3.6 *The lifting of pandemic restrictions has boosted both footfall and retail sales over the past year or so. This has supported a revival in leasing, with some notable deals by fashion and food and beverage retailers in recent quarters, with experiential retailers expanding too. The national retail vacancy rate has stabilised accordingly.*
- 3.7 *Recent positivity comes with some caveats, however. High inflation and a burgeoning cost-of-living crisis have dented consumer confidence in recent months, with GfK's ('Growth from Knowledge') confidence index falling for the first time this year in July.*
- 3.8 *Meanwhile, retail rents continue to decline, with average asking rents dropping by a further -0.5% over the past 12 months. Further rent losses are likely in the near term, although retail centres with a grocery anchor are well placed to outperform given recent demand trends, as could high streets in more affluent towns and suburbs.*
- 3.9 *On the supply side, little new retail space is likely to be built in the next few years, which should offer some support to the vacancy rate. The trend of owners converting retail space to other uses is also likely to accelerate.*
- 3.10 *UK retail investment had been recovering until Spring 2022, when falling prices and shopping centre redevelopment opportunities were luring more investors back to the sector. Momentum has eased in the past few months, however, amid concerns over rising inflation and interest rates and faltering retail sales. Pricing for retail property is likely to fall further over the next year or so. However, there is support to pricing for the supermarket market due to rising demand.*
- 3.11 Unsurprisingly, research<sup>9</sup> shows that the hospitality sector saw the biggest economic decline of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April

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<sup>5</sup> Office for Budget Responsibility, April 2023

<sup>6</sup> Office for Budget Responsibility, November 2023

<sup>7</sup> In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".

<sup>8</sup> CoStar's Retail National Report UK 2023, July 2023

<sup>9</sup> House of Commons Library – Research Briefing - Hospitality industry and Covid 19, 11 May 2022

2020, where economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, hospitality economic output over 2020 was 42% lower than 2019; and in 2021, hospitality output was 21% lower than 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all coronavirus restrictions were lifted from early 2022, the hospitality sector continues its recovery, particularly as international tourists return. It is forecast that the hospitality and leisure sectors are expected to be the fastest growing parts of the economy over the next five years. This in part reflects the large ground to be recovered following the pandemic.

## UK Consumer Spending

- 3.12** Experian Retail Planner Briefing Note 20 (February 2023) reflects on the latest economic forecasting, providing up to date information on retail trends and developments. The note makes a number of comments regarding consumer spending, taking into account the conflict in Ukraine and its wider economic impacts on the UK.
- 3.13** Squeezed household budgets due to double digit inflation and rising interest rates are underpinning a continued weakness in consumer and business confidence. Real personal disposable income is expected to decline by at least 2% in 2023 and 2024. Looking ahead this sees consumer spending falter, and there is a trend of reduced spending on non-essential items across the UK.
- 3.14** Convenience spending (i.e. spending on goods that a customer purchases frequently and easily without having to put much thought or emotion into the purchase like groceries), is likely to experience an ongoing wind down from the increased levels seen through the pandemic period, where substitute spending in restaurants was either not possible, or not demanded to the same extent given Covid 19 related fears. In the long term, growth on a per head basis settles at 0.2% per annum and spending is 4% lower than projected in Retail Planner Briefing Note 19 in the absence of a significant rebound once inflation subsides.
- 3.15** Comparison sales (i.e. sales on goods that are of higher value and typically purchased infrequently like electronic and white goods), volumes are also projected to decline in 2023. Consumer confidence has been hovering around all-time lows, and bulky goods sales in particular are likely to suffer as consumers put off major purchases, such as the replacement of white goods. A projected recovery gains momentum by 2025 and in the long-term growth per head averages around 3%.
- 3.16** Spending on leisure services fell markedly in 2020 given Covid 19 related lockdowns, recovering some of the lost ground in 2021 as restrictions eased. The latest data shows that the recovery gained momentum in the first three quarters of 2022 and for the year as a whole, sales are estimated to have come in 5% above the pre-pandemic 2019 level. In the long term, leisure spending is projected to grow at roughly half the rate of total retail spend, though three times faster than for convenience spend. Leisure floorspace continues to grow relatively strongly.

Figure 3.16.1 Experian's Identified UK retail spending (including non-store) and leisure spending<sup>10</sup>

UK Volume Growth Per Head (%)	2022-31	2031-40	2022-41	1997-2007	2008-11	2012-21	1997-2021
<b>Annual averages</b>							
Retail Spend	0.7	2.1	1.4	1.0	-0.2	1.8	1.1
Convenience goods	-0.9	0.2	-0.4	-3.0	-2.4	0.7	-1.4
Comparison goods	1.7	3.0	2.3	3.6	0.2	2.3	2.6

<sup>10</sup> Experian, Retail Planner Briefing Note 20, February 2023

UK Volume Growth Per Head (%)	2022-31	2031-40	2022-41	1997-2007	2008-11	2012-21	1997-2021
<b>Annual averages</b>							
of which bulky	1.9	3.7	2.7	6.6	2.4	3.1	4.5
Non-bulky	1.6	2.7	2.1	0.9	-0.3	2.1	1.2
Leisure	2.7	0.8	1.8	-2.8	-3.7	-1.4	-2.4
Consumer spending	1.3	1.4	1.4	2.7	-1.2	0.7	1.3

Source: Figure 2 of Experian Retail Planner Briefing Note 20

## UK-Wide Online Shopping

- 3.17** The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 has accelerated this trend.
- 3.18** Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre networks, faster delivery times and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow strongly in the mid-term, whereby in 2026, 32.0% of retail expenditure would be spent online compared to 29% in 2023. The pace of e-commerce growth is anticipated to moderate over the longer term, reaching 38.2% of total retail sales by 2040<sup>11</sup>. Beyond this point it is too early to understand whether online sales will grow further still.

Figure 3.18.1 Experian's Identified and Forecast UK Market Share of Non-Retail Sales<sup>12</sup>

Volume Growth Per Head (%)	2023	2026	2030	2035	2040
Total	29.0	32.0	34.6	36.7	38.2
Convenience goods	18.6	21.3	23.4	24.9	25.9
Comparison goods	35.4	38.2	40.4	42.1	43.1

Source: Figure 5 of Experian Retail Planner Briefing Note 20

## UK-Wide Omni-Channel Retail

- 3.19** The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete.
- 3.20** Omni-channel retail (or omni-channel commerce) is increasingly becoming the norm across the industry. This is a multichannel approach to sales that focuses on providing a seamless customer experience whether the client is shopping online or in a brick-and-mortar store. For example, many stores sell online but fulfil orders from regular stores rather than warehouses such as Argos and Habitat in Sainsburys<sup>13</sup>. Such purchases, therefore, help to sustain tangible retail floorspace.

<sup>11</sup> Ibid

<sup>12</sup> Ibid

<sup>13</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

- 3.21 A report by Barclays Corporate Banking, indicates that click and collect shopping was worth £42.4bn in the UK, comprising 8.4% of the UK's total retail spending in 2022<sup>14</sup>. In essence, goods that are bought online but picked up from a physical store, now account for 40% of sales for retailers who offer the service. This report therefore shows how online, and retail sales channels are becoming more intertwined.
- 3.22 The acceleration in consumer behaviour change in 2020 has made an omni-channel strategy more important than ever. In research conducted by BigCommerce and Retail Dive in 2020, 46% of retail executives said they planned to increase their investment in omni-channel retailing moving forward, a move away from their plans prior to COVID-19<sup>15</sup>.
- 3.23 When it comes to shopping in physical stores, 2021 research by Klarna<sup>16</sup> (an online shopping platform) highlights that physical retail is still an important channel even for digital-savvy shoppers. Shoppers are nearly twice as likely to value seeing and feeling items they are buying in real life (88% of Klarna shoppers); meanwhile, half (49%) of shoppers value being able to visit showrooms and see items in store but pay online.

### UK Leisure and Food & Drink Trends

- 3.24 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focussed on food and drink operators.
- 3.25 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK, such as Nandos and Wagamama. However, this market has become saturated in many locations and a number of high-profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.
- 3.26 A further significant recent high street success story has been the resurgence of the Town Centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.
- 3.27 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in Town Centres (partly as a consequence of digital technology). Town Centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.
- 3.28 More generally, the gym market continues to perform well, there is now approximately 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn<sup>17</sup>. Around one in every seven Britons has a gym membership<sup>18</sup>. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.

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<sup>14</sup> [Barclays, Click-and-collect economy worth over £42bn as 'hybrid' shopping grows, 2022](#)

<sup>15</sup> [bigcommerce.co.uk](https://bigcommerce.co.uk)

<sup>16</sup> [Internet Retailing, 13 October 2021](#)

<sup>17</sup> Article headlined 'Fitness Industry in the United Kingdom (UK) – Statistics & Facts', Statista, 26 May 2021.

<sup>18</sup> Ibid

3.29 The impact of the pandemic on the leisure industry is still to be determined. Support provided by the Treasury has helped support businesses in 2020 and 2021 and mitigated the effects of 'lockdown' restrictions to some degree. However, the full and ongoing impact will become clearer this year as more stable trading conditions return.

### The UK's Night-Time Economy

3.30 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5 pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. The night-time economy is about catering for a wide range of demographics and interests.

3.31 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a Town Centre and boost the economy.

3.32 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:

- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
- **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a Town Centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stay open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

3.33 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a Town Centre's strengths and address weaknesses.

### London's Economy

3.34 London's economy powers the UK, accounting for a quarter of the national total economy and is expected to grow by around 0.8% in 2023<sup>19</sup>. This is largely due to it being a global city, and also the home to over 13.4% of the total population of the UK. Around a third (34%) of consumer expenditure by Londoners is on commodities which correspond broadly to the retail sector<sup>20</sup>.

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<sup>19</sup> London Retail Market Report 2023, CoStar

<sup>20</sup> [The Retail Sector in London and the Impact of the Coronavirus on Trends, GLAECONOMICS, 2021](#)

- 3.35 The economy in London particularly struggled during the pandemic, as well as the impacts that arose from Brexit. The financial sector was impacted to a greater extent than others, with Brexit acting as an additional hinderance to its performance.
- 3.36 The retail market is gradually bouncing back, however it is unlikely to ever reach pre-pandemic levels again. Gaps that have been left by the closure of more traditional retailers are gradually being filled by leisure services and experimental retailers such as Amazon Fresh, a concept that combines virtual payment with a typical convenience store outlet. London's important tourism sector is quickly recovering and has played a part in the growth of the economy, although international travel still remains below pre-pandemic levels<sup>21</sup>.
- 3.37 Despite London's economy steadily bouncing back following the pandemic, the more recent cost of living crisis resulting in squeezed disposable incomes is further impacting London. In London it has been found, that, as a result of the cost-of-living crisis, 21% of Londoners are 'struggling financially' and 32% are 'just about managing'<sup>22</sup>. As a result of this, the top two ways to manage living costs are spending less on non-essentials (51%) and buying cheaper products (50%).

### The London Borough of Croydon

- 3.38 Tuning to the local picture, Croydon Metropolitan Centre (CMC) has had recent struggles as a retail centre. This issue pre-dates the pandemic when the town centre was already facing several challenges, including changes in consumer demands, economic and market restructuring, an inherent car-focused infrastructure, and limited public and private sector investment. This resulted in increased vacancies and impacts on attractiveness and investments<sup>23</sup>.
- 3.39 Croydon's retail growth in comparison to the rest of London has been amongst the lowest of all boroughs. Retail vacancies have been steadily rising over the past few years due to store closures and a number of high street retailers entering administration.
- 3.40 Over the 12 months to September 2023, the vacancy rate for all town centre units in the London Borough of Croydon rose by 0.4%<sup>24</sup>. This reflects a growing trend in recent years of a steadily growing vacancy rates in the borough, and a wave of rising vacancies that is expected to continue until 2025/26. However, this trend has been intensified by the national trend of higher vacancy rates in our town centres as shopping habits, and the function of town centres are changing. We further examine the fortunes of individual centres in Sections 5-15.
- 3.41 A large proportion of the retail floorspace in Croydon is made up of three department stores, however only one remains open and functioning, House of Fraser, which is located in Centrale. In May 2020, Debenhams was permanently closed in Croydon Town Centre, and the unit is now occupied by Next Outlet, which does not create the same vibrancy and attraction to the centre as a department store would have. The flagship store of Allders, located in the prominent North End Area of Croydon, was formerly the third largest department store in the UK. In 2005, Allders went into administration before closing in 2013. The same year, the building re-opened as 'Croydon Village Outlet', hosting 35 businesses ranging from homewares to fashion. It closed in 2019 after the acquisition by Compulsory Purchase Order of the building by Croydon Council, earmarked for part of the Westfield development.<sup>25</sup>

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<sup>21</sup> Ibid

<sup>22</sup> [London's Economy Today Editorial September 2023](#)

<sup>23</sup> [Croydon Future of Destination Retail Report: We Made That, November 2020](#)

<sup>24</sup> [Croydon Retail Submarket Report, September 2023, CoStar](#)

<sup>25</sup> [Croydon Future of Destination Retail Report: We Made That, November 2020](#)

- 3.42 Department stores were a destination that people would always visit, and one which would attract people to a town centre in the first place. The closure of these large spaces has a knock-on effect to the town centres viability, as a focal point for shoppers is ultimately lost, making life increasingly hard for other businesses.<sup>26</sup>
- 3.43 The long-awaited plan for the proposed redevelopment of The Whitgift Centre and Centrale, facilitated by Unibail-Rodamco-Westfield (Westfield) has not progressed after previously falling through, however Westfield are now working on a new redevelopment proposal for the sites in their ownership after buying Hammerson, the owners of the Centrale Shopping centre. With full ownership of the site, it allows for a vision to be created that supports the transformation of the area as one.
- 3.44 Elsewhere Westfield developments in London, Westfield London and Westfield Stratford City have pioneered the regeneration of two key areas. Westfield London has been seen as a catalyst for the future development and regeneration of the White City Opportunity Area, including Shepherds Bush Town Centre. Westfield Stratford City was the first piece of the Olympic legacy and is hoped to play an important regeneration role as the area continues to be transformed. Westfield Stratford City and the wider regeneration area has become a metropolitan capital for East London. Using these previous examples of Westfield Developments in London, it can be hoped that the planned Westfield in Croydon will bring similar prosperity to the town centre.
- 3.45 Looking back to the previous 2009 Croydon Metropolitan Centre Retail Strategy, it identified that there were clear opportunities for a positive future for CMC. This was due to CMC being the largest shopping centre in South London with a very large catchment, and continual growth of retail expenditure following the economic downturn of the time. Prior to the 2008 recession, John Lewis were known to be interested in having representation in CMC, however no representation ever came to fruition in the metropolitan centre. In 2010, a John Lewis at Home store opened on the Purley Way, located outside of CMC, but shut for good in 2020 after a drastic fall in company profits.
- 3.46 The previous 2009 Strategy also highlighted that one of the principal issues of CMC was that it had a negative image, which affected its standing and perception as a shopping centre. The Study demonstrated that there was a lack of quality aspirational retailers looking for representation in CMC when compared with nearby competing centres. Unfortunately, the outlook for representation in CMC remains mixed, with the majority of businesses seeking representation in CMC categorised as fast food and take-away restaurants, as seen at Paragraph 5.59.
- 3.47 Unfortunately, since the previous 2009 Strategy, CMC has experienced a large downturn in vibrancy and attraction to both shoppers and businesses. Since the closure of department stores Allders in 2013, and Debenhams in 2020, the centre has lost a high amount of 'higher' end retailers due to both lack of footfall, and also the closure of national multiple retailers that have fallen into administration, such as Topshop and Topman. Department stores play a vital role in attracting people and businesses to town centres, as they act as a focal point for shoppers, so their closure has a profound knock on effect to other businesses as their trade drops. This has left CMC with a high proportion of lower end retailers, discount stores, as well as a large vacancy rate.
- 3.48 As stated in the previous 2009 Strategy, it is without a doubt that there is still a high potential for a positive future of CMC. Its position as the largest shopping centre in South London remains, and the catchment of the metropolitan centre is ever growing due to residential densification around CMC and the wider catchment area of the Borough and neighbouring boroughs. The footfall potential to support a vibrant centre is there, and the proposed future investment by Westfield is hopefully now imminent. As stated previously, department stores play a vital role in attracting people and businesses to town centres. It is unlikely that any department store would be looking to establish themselves in a town centre in today's economy, due to changes in shopping habits, however the vacant Allders unit would provide an excellent

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<sup>26</sup> [Going down: the destabilising demise of the town-centre department store, Raconteur, April 2023](#)



blank canvas for a state of the art experiential retail and leisure use of a former large department store, and could once again anchor CMC, resulting in wider spread attraction and investment by higher end retailers.

## Conclusion

- 3.49 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost-of-living crisis associated with rising energy prices and inflation. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 3.50 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales in light of the fact that the online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' in order to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.
- 3.51 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty.
- 3.52 Looking at the picture in CMC, it is clear that the centre has suffered as a result of national retail trends, whilst the centre has also experienced localised problems as a result of the closure of businesses. There is confidence that Westfield will contribute to the positive future for CMC, although modern approaches must still be utilised to find a viable use of the existing town centre units, as peoples shopping patterns and the role of town centres is changing.

## 4. Town Centre Health-Checks

### Methodology

- 4.1 Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.
- 4.2 In this context, this Study provides detailed health check assessments for Croydon Metropolitan Centre, as well as more simplified health checks for the District Centres of Addiscombe, Coulsdon, Crystal Palace, New Addington, Norbury, Burley, Selsdon, South Norwood and Thornton Heath.
- 4.3 All of the health checks have been carried out in accordance with the Town Centres PPG, which sets out a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. This has informed the creation of a matrix that sets out an easy-to-digest 20-point SWOT assessment. The general methodology is set out below.

### 20-Point SWOT Assessment

- 4.4 The Nexus 20-point SWOT assessment has been formulated to encompass the following:

**1. Retail Offer** - Using a combination of Experian GOAD data, a retail property intelligence system (where available) and site visit observations (where GOAD data was unavailable), we examine Experian GOAD categories i.e. convenience, comparison, service uses, and vacant units. We compare the results for Croydon Town Centre from previous data collected in 2019 to understand how compositions have changed over time, and against current national average benchmarks for each category (Experian Category Report, 2023) for all circa 1,950 centres and shopping locations covered by Experian.

**2. Vacant Units** - We contrast the current vacancy rate of Croydon Town Centre with the previous Retail Study and current national averages. For the district centres, the current vacancy rate is contrasted with current national averages. We also consider any vacancy ‘hot-spots’ and reasoning why those might have occurred.

**3. Culture and Leisure** - Again using our GOAD base plans, we are able to identify the number of Leisure Services and assess the diversity of what is on offer.

**4. Unhealthy Businesses** - Looking at unhealthy businesses is important to understand the levels of health a centre is promoting. The Royal Society for Public Health published a report in 2018 titled ‘Health on the High Street: Running on empty’. The report uses “the Richter scale of health”<sup>27</sup> to measure the healthiness of different types of shops and other businesses on the high street. Vacant shops, tanning shops, off-licences, fast food outlets, bookmakers and high-cost credit outlets have been deemed the least health promoting, and are the categorisation in which this report will analyse unhealthy businesses. In 2022, the estimated national average for unhealthy businesses in UK town centres was 26.8%<sup>28</sup> (measured by unit numbers).

**5. Visitor Satisfaction** - Visitor Satisfaction is derived through analysis of answers to Questions 23a-27 of the Household Telephone Survey on residents likes and dislikes for each centre. The Household Telephone Survey can be found at **Appendix D**.

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<sup>27</sup> <https://www.rsph.org.uk/static/uploaded/dbdbb8e5-4375-4143-a3bb7c6455f398de.pdf>

<sup>28</sup> Experian Goad data

**6. Business Confidence** - Rental values and market yield data has been obtained where available under license from CoStar. This data provides context to the business confidence in each centre.

**7. Partnership Working** - Partnership working is the level of engagement between the local authority, local business and the community. As well as our on-site observations, we have also met with key stakeholders at Croydon Council to discuss this aspect further.

**8. Community Spirit and Events** - Linked to 'Partnership Working', we examine here our understanding of the level of community engagement in each centre. We detail any events which each centre is renowned for.

**9. Footfall** - Nexus has undertaken footfall count for each centre.

**10. Access** - This is a Nexus assessment of how easy a centre is to reach; public transportation options; and access by other modes (such as cycling or walking). We utilise the Household Survey findings to understand how each centre is accessed by its visitors.

**11. Car Parking** – This is a Nexus assessment of the quantity, quality and cost of car parking.

**12. Environmental Quality** - A Nexus assessment of environmental quality including general cleanliness and attractiveness, the quality of buildings and the quality and provision of open spaces.

**13. Historic Environment** - An assessment of the historic environment is undertaken using Historic England mapping, along with a review of local conservation areas and locally designated heritage assets.

**14. Street Markets** – A Nexus assessment on the quality and provision of street markets.

**15. Independent Trading** - We consider the level of independent trading in a centre versus the number of national multiple retailers, where a national multiple is defined as operating in 9 units or more nationally. This reflects the uniqueness of a centre and the type of person that might be attracted to it.

**16. Crime and Safety** - The perception of safety in each centre has been assessed using site visit observations as well as crime data provided by the Police, and considers factors such as lighting, natural surveillance and traffic safety.

**17. Night-time Economy** - Using GOAD mapping, we assess businesses which typically operate beyond the standard working day, such as restaurants and public houses.

**18. Public Investment** - We have liaised with Croydon Council to understand the extent of recent and planned public investment in each centre.

**19. Technological Enhancement** - A Nexus assessment of the level of technology operating in each centre e.g. through Apps/online discount schemes, the availability of WiFi, electric bike racks, electric car charging and other aspects.

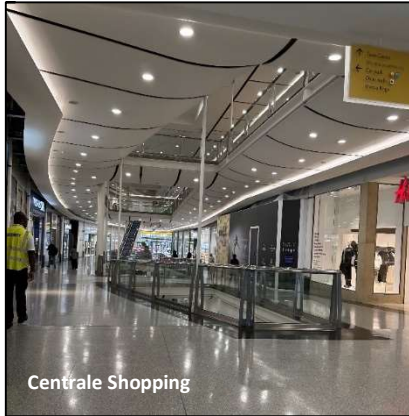
**20. Commercial Demand** - We examine commercial demand by utilising occupier requirements for the local authority area from The Requirements List.

# 5. Croydon Metropolitan Centre Healthcheck

## Description

5.1 Croydon Metropolitan Centre (“CMC”) is the southern-most town centre in Greater London and consists of 895 units.

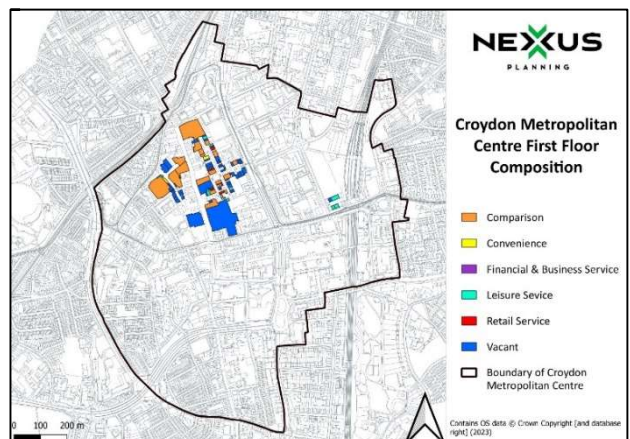
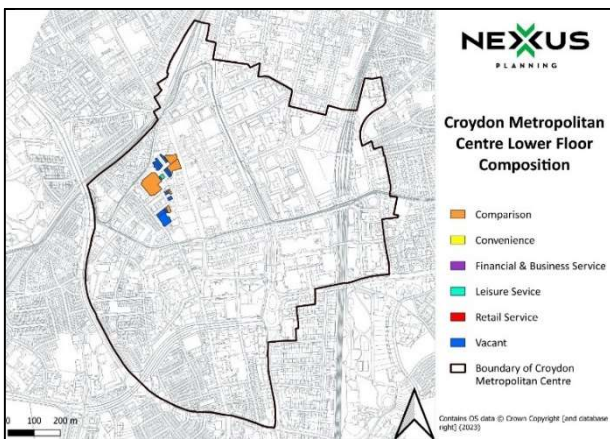
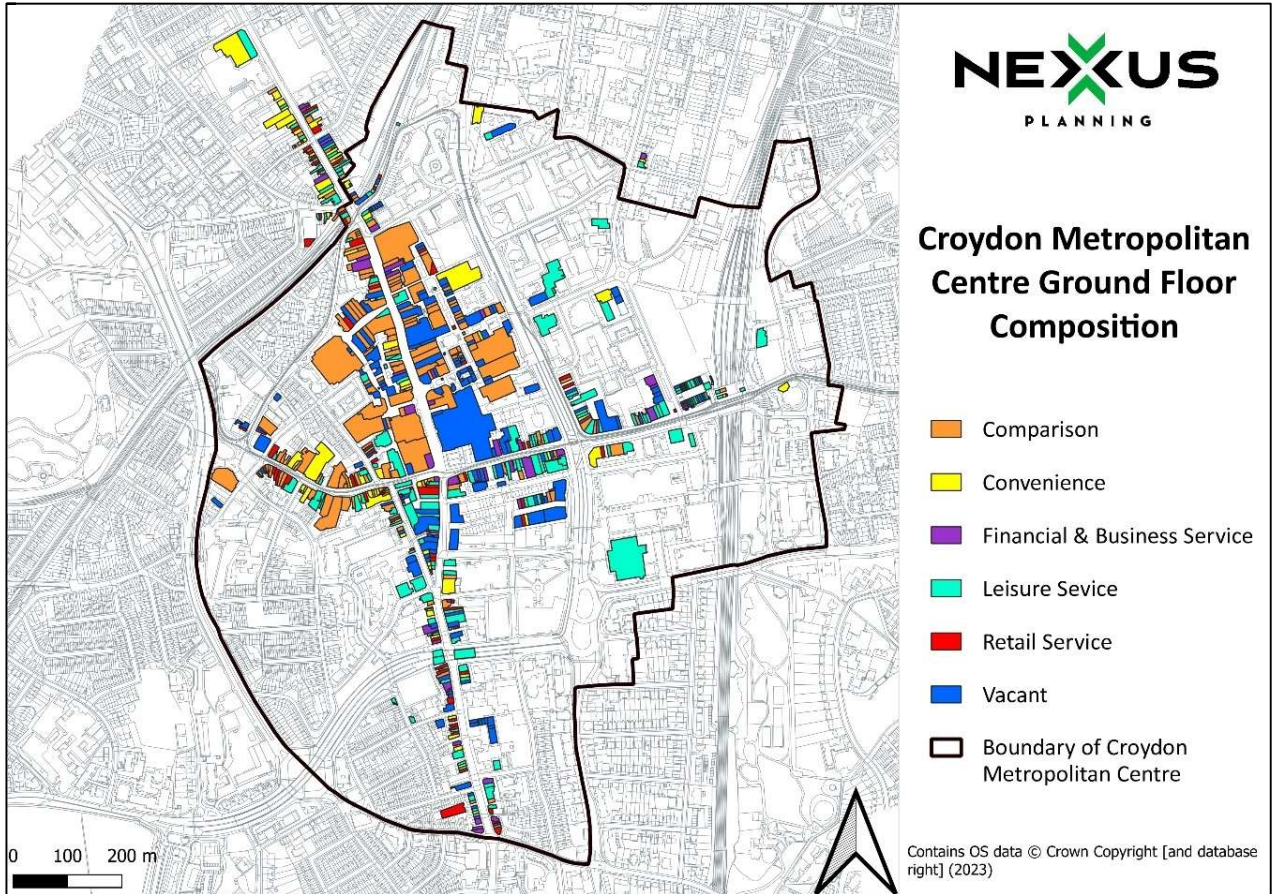
Figure 5.1.1 Photos of Croydon Town Centre



Source: Nexus Site Visit (September 2023)

## Retail Offer

Figure 5.1.2 Maps showing composition of retail units in CMC



5.2 A larger print version of the mapping is contained at **Appendix A**.

5.3 As shown in the Figure below, the retail offer in CMC is proportionately below national average in each instance. 22.3% of units in Croydon are comparison goods units, which is below the national average of 26.9%. 7.8% of units are in convenience goods use, which is below the national average of 9.3%. Retail services make up 10.2% of uses, significantly

below the national average of 15.8%. 23.3% of units are in leisure service use which is only slightly below the national average of 25.4%, and 5.7% of units are in financial & business service use which is well below the national average of 8.7%.

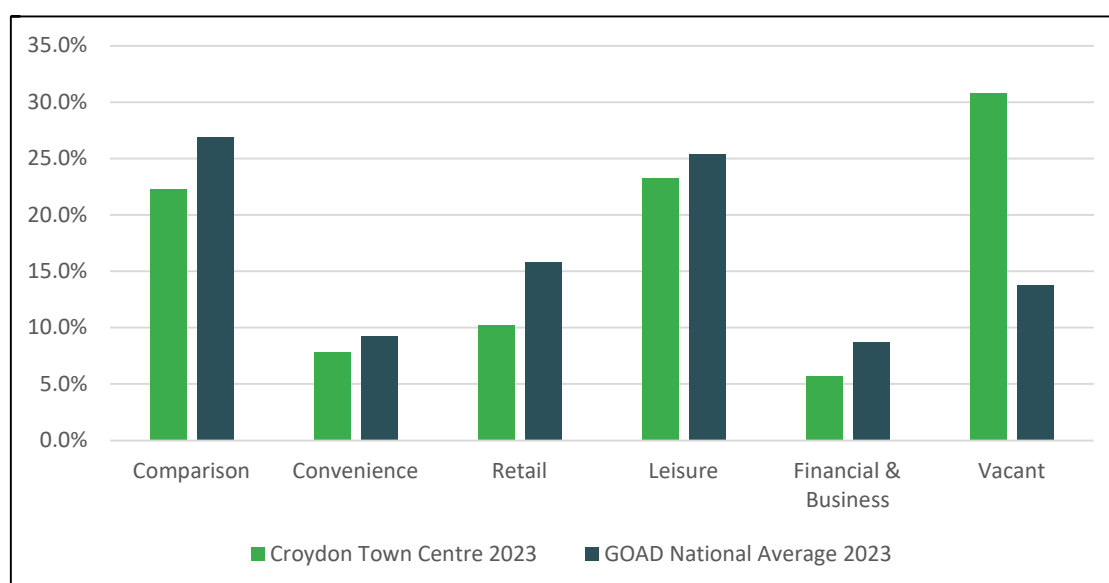
5.4 Looking at the time-series data below, there has been a small decline in provision in terms of comparison, convenience and service goods units over the period 2019-2023. This coincides with a sharp increase in vacancy, as we discuss below.

Table 5.4.1 Croydon Metropolitan Centre - Composition Table

	Croydon 2023 (total)	Croydon 2023 (%)	National Average 2023	Croydon 2019 (%)	National Average 2019
<b>Comparison</b>	<b>177</b>	<b>22.3%</b>	<b>26.9%</b>	<b>23.9%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>62</b>	<b>7.8%</b>	<b>9.3%</b>	<b>10.4%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>311</b>	<b>39.1%</b>	<b>49.9%</b>	<b>45.2%</b>	<b>49.5%</b>
<i>Retail</i>	<i>81</i>	<i>10.2%</i>	<i>15.8%</i>	<i>12.3%</i>	<i>15.2%</i>
<i>Leisure</i>	<i>185</i>	<i>23.3%</i>	<i>25.4%</i>	<i>24.9%</i>	<i>24.5%</i>
<i>Financial &amp; Business</i>	<i>45</i>	<i>5.7%</i>	<i>8.7%</i>	<i>8.0%</i>	<i>9.8%</i>
<b>Other Retail</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0.1%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>245</b>	<b>30.8%</b>	<b>13.8%</b>	<b>20.4%</b>	<b>12.0%</b>
<b>Total</b>	<b>795</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

Source: Experian GOAD

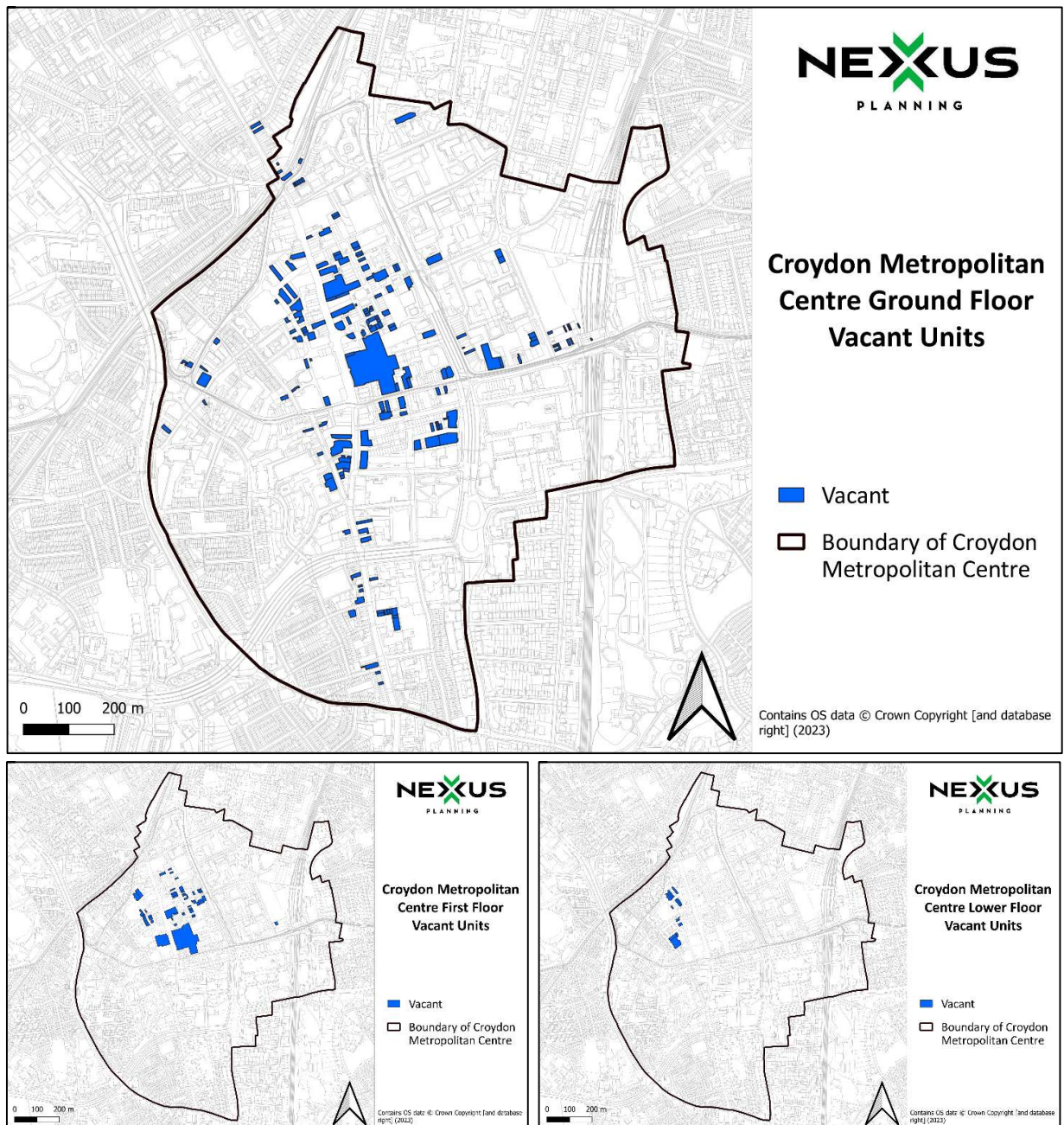
Figure 5.4.2 Croydon Metropolitan Centre - Composition Graph



## Vacant Units

- 5.5 Croydon has a very high vacancy rate, with 30.8% of units being vacant. This is significantly above the national average of 13.8%. There are notable clusters of vacant units in the Whitgift Centre and Centrale shopping centres.
- 5.6 As per the Figure above, there has been a significant rise of vacant units in CMC since 2019, where a vacancy rate of 20.4% was recorded. The national average of vacant units only rose from 12.0% to 13.8% in this period, thereby highlighting how hard the Metropolitan Centre has been hit relative to all centres across the UK.

Figure 5.6.1 Map showing distribution of vacant units in Croydon



## Benchmark Against other South London Metropolitan Centres

5.7 When compared to other comparable Metropolitan and Town Centres in South London, the vacancy rate of CMC stands out as being significantly higher than competitors. At 30.8%, Croydon has a vacancy rate more than double its near neighbours (average of 15.2%). As a result, it also has the smallest active comparison goods (22.3% compared to an average of 27.7%) and service goods (39.1% compared to an average of 48.1%) components. CMC does not therefore have the quantity and range of offer of its near neighbours.

Figure 5.7.1 South London Metropolitan Centres composition comparison

	Croydon 2023 (%)	Bromley 2023 (%)	Kingston 2023 (%)	Sutton 2023 %	Hounslow 2023 %	Richmond 2022 (%)	South London Average (%)
<b>Comparison</b>	<b>22.3%</b>	<b>33.5%</b>	<b>32.2%</b>	<b>24.8%</b>	<b>25.8%</b>	<b>27.8%</b>	<b>27.7%</b>
<b>Convenience</b>	<b>7.8%</b>	<b>7.4%</b>	<b>7.5%</b>	<b>10.2%</b>	<b>13.6%</b>	<b>7.0%</b>	<b>8.9%</b>
<b>Services (total)</b>	<b>39.1%</b>	<b>45.4%</b>	<b>46.9%</b>	<b>51.3%</b>	<b>49.0%</b>	<b>56.6%</b>	<b>48.1%</b>
<i>Retail</i>	<i>10.2%</i>	<i>13.2%</i>	<i>11.7%</i>	<i>14.1%</i>	<i>10.7%</i>	<i>17.7%</i>	<i>12.9%</i>
<i>Leisure</i>	<i>23.3%</i>	<i>22.9%</i>	<i>28.7%</i>	<i>28.0%</i>	<i>28.1%</i>	<i>30.1%</i>	<i>26.9%</i>
<i>Financial &amp; Business</i>	<i>5.7%</i>	<i>9.3%</i>	<i>6.5%</i>	<i>9.2%</i>	<i>10.2%</i>	<i>8.8%</i>	<i>8.3%</i>
<b>Vacant</b>	<b>30.8%</b>	<b>12.8%</b>	<b>13.5%</b>	<b>13.7%</b>	<b>11.6%</b>	<b>8.6%</b>	<b>15.2%</b>

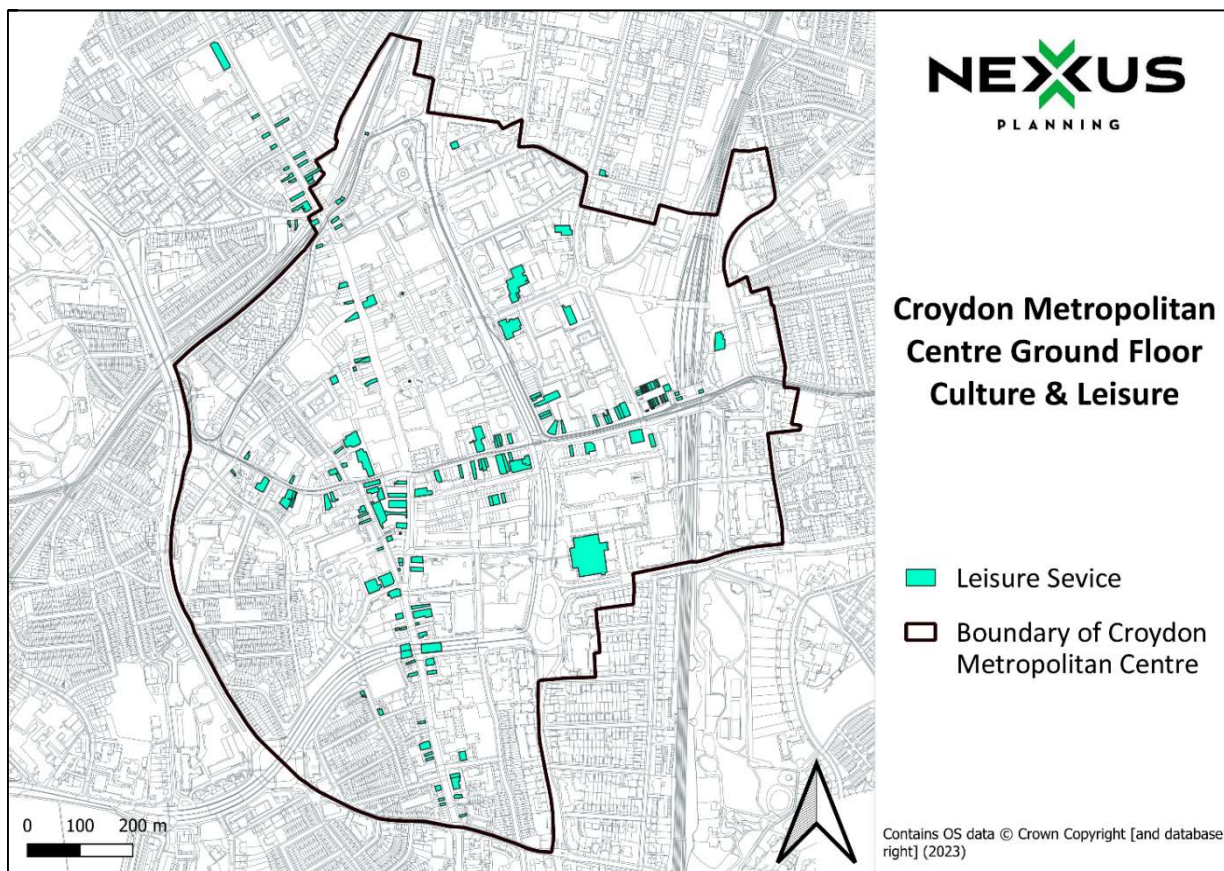
Source: Experian GOAD

## Culture & Leisure

- 5.8 Croydon's cultural and leisure offer (23.3% of units) is similar to the national average (25.4%).
- 5.9 There are clusters of units at Box Park (see also Section 16) and the High Street. Notwithstanding, there is generally speaking a pre-dominance of take-away restaurants.
- 5.10 Just south of the centre's boundary is South End, which has historically been an area dominated by bars, pubs and restaurants. With the flexibility in changing the use of bars and restaurants, in recent years some of the character of the area has been lost as units have been converted to uses such as take-aways and barbers. In line with the confirmed closure of Box Park (also see Section 16), investment into South End to enhance the areas vibrant culture and leisure provision would be of great benefit to CMC.



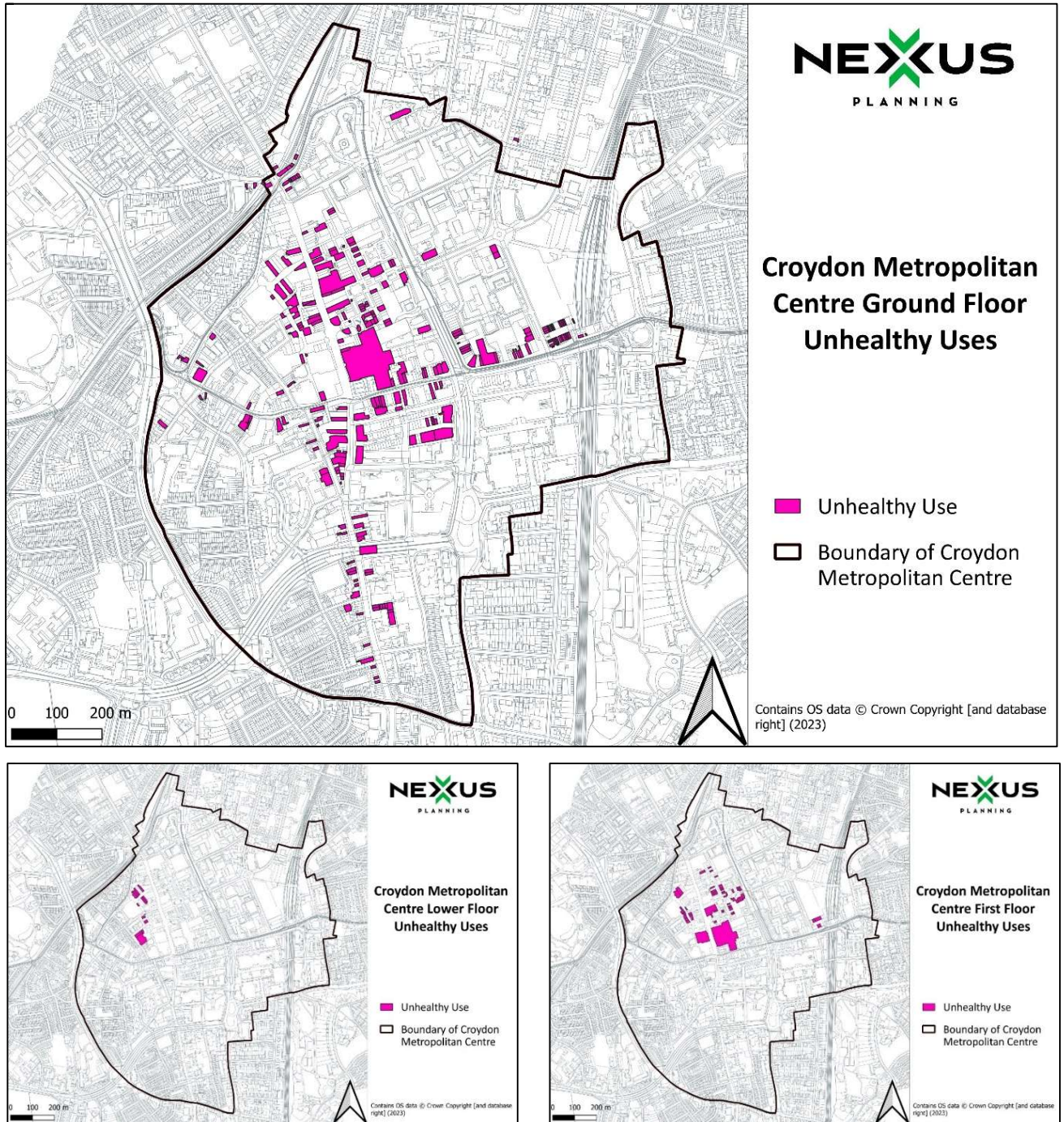
Figure 5.10.1 Maps showing distribution of leisure uses in Croydon



## Unhealthy Businesses

- 5.11 There are a proportionately large number of unhealthy businesses in Croydon Metropolitan Centre. As defined by The Royal Society for Public Health, 337 businesses are considered to be unhealthy, which is in total 42.4% of all units in the centre. This figure is considerably higher than the national average of unhealthy businesses in town centres, which was 26.8% in 2022.
- 5.12 A large majority of the unhealthy businesses are vacant units, with a particular concentration around the two shopping centres as described above. Vacant units are considered unhealthy as they do not attract footfall to a town centre. High concentrations of vacancies can attract crime due to there being no active frontages provided by the unit.

Figure 5.12.1 Maps showing distribution of unhealthy businesses in Croydon

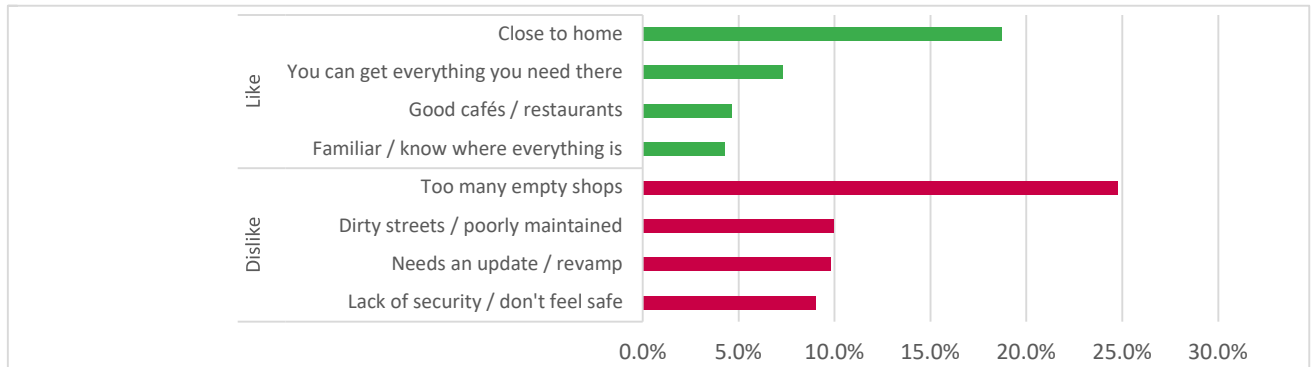


## Visitor Satisfaction

- 5.13 Results from the household survey identified the top likes and dislikes of Croydon Metropolitan Centre, as seen below.
- 5.14 As seen in 5.14.1, it has been found that the top like for Croydon Metropolitan Centre is due to its proximity to where people live. Within the defined centre boundary and its periphery is a large amount of residential accommodation with good transport links to the centre. The top dislike was found to be that there are too many empty shops. The high vacancy

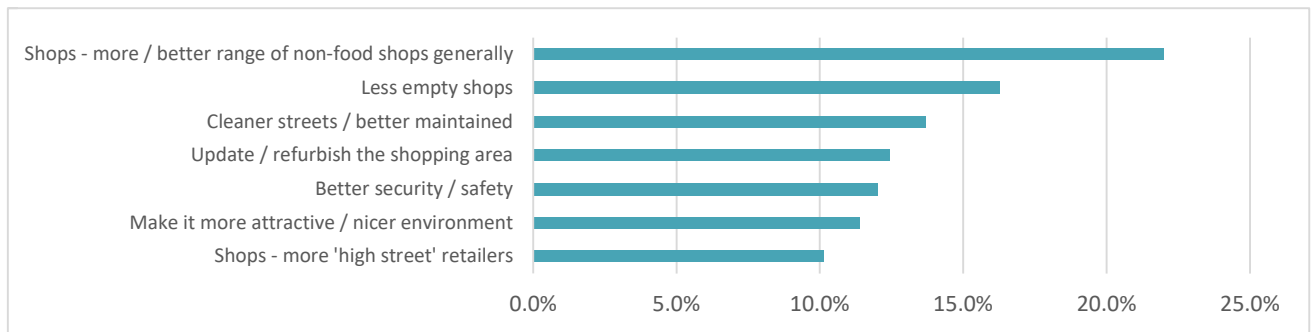
rate (30.8%) is noticeable in the centre, particularly in the once vibrant shopping centres which have a disproportionately high vacancy rate.

Figure 5.14.1 Croydon Metropolitan Centre Public Opinion



5.15 Results from the household survey identified the below as measures that would encourage people to visit CMC.

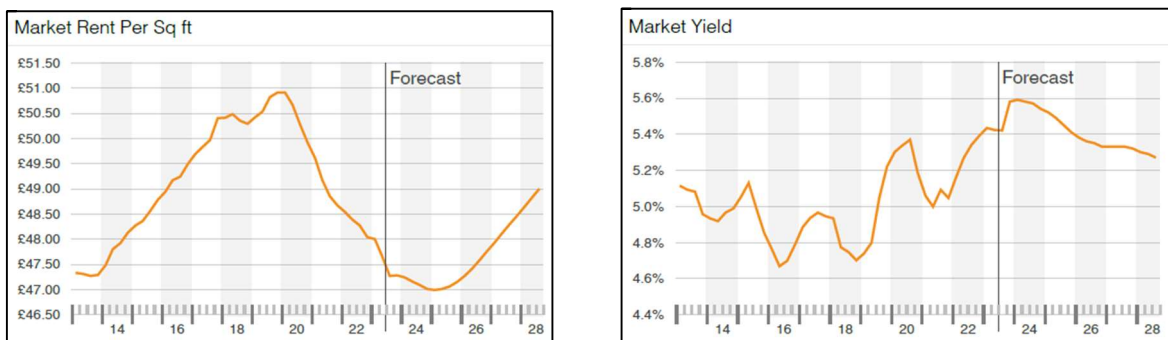
Figure 5.15.1 Measures that would encourage people to visit CMC



### Business Confidence

5.16 In September 2023, the Market Rent per sq/ft in Croydon was £47.31 and market yield was 5.4%. The latter compares to an average market yield across the UK of 7.4%, indicating perhaps that CMC is viewed more optimistically than many centres. As with many centres though, the COVID-19 Pandemic had a significant impact on business confidence, with sharp negative movements on both metrics shown below since 2020/2021. However, both metrics are forecast by CoStar to begin moving in a positive direction (i.e. increasing rents and decreasing yields) from 2024 onwards.

Figure 5.16.1 Market Rent per SF and Market Yield in Croydon Metropolitan Centre



Source: CoStar

## Partnership Working

- 5.17 Croydon Council has an online events calendar, providing easy access to a plethora of events that they facilitate through funding or sponsorship each year. Events include Christmas lights, religious celebrations such as Eid and Diwali, along with summer activities that are held in local parks. However, a vast majority of these events are held outside of CMC.
- 5.18 The council also holds engagement workshops with local communities, with an example being a series of community engagement sessions on Healthy Neighbourhood Schemes that were held in February and March of 2023.
- 5.19 The council also runs education courses for residents in Croydon. One example is Croydon Adult Learning and Training (CALAT) which provides a range of courses including art and design, practical skills, ICT, and English and maths lessons.

## Community Spirit

- 5.20 Due to a number of reasons, including the size of CMC, the number of new dwellings that are being built in the centre, and the number of people who travel into the centre to shop or work, community spirit in the centre feels fragmented. There will be clusters of communities, where people go to the same place of worship, community centre or live in the same building throughout Croydon.

## Events

- 5.21 In 2018, the Fairfield Halls, an arts, entertainment and conference centre, reopened in 2018 after a £30 million redevelopment project to modernise the site. Historically, the Fairfield Halls attracted a plethora of big-name acts such as David Bowie, Pink Floyd and the Beatles, however in more recent years the venue has only attracted more local acts. Currently there is something being held at the Fairfield Halls at least once a week in addition to regular Fairfield Dance sessions.
- 5.22 In 2023, Croydon was awarded the Mayor of London's 'London Borough of Culture' award. Following the award, 'This is Croydon' was launched in April 2023 'This is Croydon' is a year-long celebration of the Borough's unique identity, diverse communities and rich heritage, culture and creativity. Events that are held through 'This is Croydon' have included a Croydon Music Heritage Trail, photography exhibitions, tours of Selhurst Park Stadium and musical showcases by local artists. The award was launched in 2017 and aims to shine a light on the character and diversity of London's boroughs and bring culture to everyone.
- 5.23 Box Park, located outside East Croydon Station has a high frequency of events such as Rugby World Cup screenings, Crystal Palace Football screenings, Quiz nights and karaoke nights.
- 5.24 Throughout summer 2023, there were a number of summer festivals held in Croydon including Croydon Food & Music Festival and Croydon Carnival.

## Access

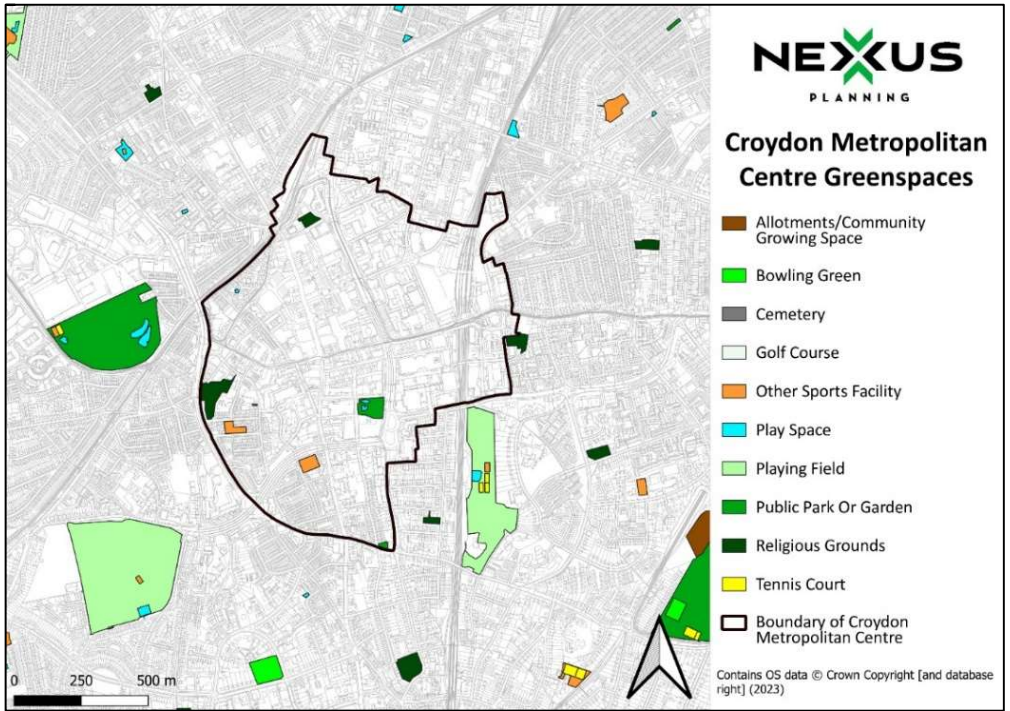
- 5.25 CMC is accessible by various means of transport. East Croydon Train Station is located to the east of the centre, providing frequent trains to London Bridge, London Victoria, Gatwick Airport and Brighton.
- 5.26 Despite Croydon not having a Tube service, it is connected by the London Overground in West Croydon and also the Tram service. The Overground runs roughly every 15 minutes with the end destination of Highbury & Islington Rail Station. The Tram runs through CMC with the end destinations of Wimbledon, Beckenham Junction, Elmers End and New Addington.

- 5.27 A high number of bus routes run through Central Croydon to destinations such as Lewisham, Sutton, Wallington, Purley, Caterham, Elephant and Castle, Stockwell, Brixton, Streatham and Morden. The Superloop was introduced in June 2023, and is a network of 10 express bus routes, one of which runs through Croydon, connecting Croydon to Heathrow Airport with just three stops on the route.
- 5.28 Investment has recently been made around Croydon to make it more attractive to cyclists. Work has been done to improve the amount of cycle parking, as well as improving the safety and frequency of cycle lanes.
- 5.29 In November 2023, a series of projects were announced to provide improved connections throughout CMC. The purpose was to enable residents and visitors to provide safer, greener and more pleasant routes that were easier to navigate. Following a successful bid by Croydon Council to the Levelling Up Fund, £18.5m of government funding was awarded for these projects. The projects will cover the South End restaurant quarter, East Croydon station, West Croydon station and Old Town and Croydon Minster. Central to the bid was the delivery of a new civic square for the Fairfield cultural complex which will connect Queen's Gardens and Surrey Street Market.
- 5.30 Pedestrian access around CMC is varied depending on where you are walking to and from. On the most part, there are wide and even pavements around Croydon, and the High Street is pedestrianised. Wellesley Road is a barrier to pedestrian flows with a large distance between crossing points. There is an underpass connecting Wellesley Road to the Whitgift Centre and the wider shopping area of Central Croydon, however in recent years due to the closure of shops, the underpass has begun to feel unsafe for pedestrians.
- 5.31 Results from the household survey identified that the most common way people access Croydon Metropolitan Centre was by bus, with 42.9% of respondents giving this answer. The second most common way of accessing Croydon was by car (25.7%). Positively, walking was also common, with 19.8% of respondents of the household survey saying they do so.

## Environmental Quality

- 5.32 The newly refurbished Queen's Gardens, opposite the Fairfield Halls is the main green space within the defined CMC boundary. However, given the size of CMC and the number of residents, this space is very small.
- 5.33 Outside of CMC there are three large green spaces, namely Park Hill Park located to the south-east of the centre, Wandle Park, located to the west, and Duppas Hill Recreation Ground located to the south-west.
- 5.34 North End, the road which runs between the Whitgift Centre and Centrale is the main shopping high street and lined with trees which creates a positive green environment for visitors. Around the rest of the centre more could be done to incorporate the green environment such as introducing street planters, trees on open paved spaces, and hanging baskets on shop fronts.
- 5.35 Besides the green environment in Croydon the overall environmental quality is varied. There is a high frequency of street furniture around the centre, however the centre has a high level of litter and graffiti particularly in the areas with high vacancy rates which in turn contributes to lower footfall.

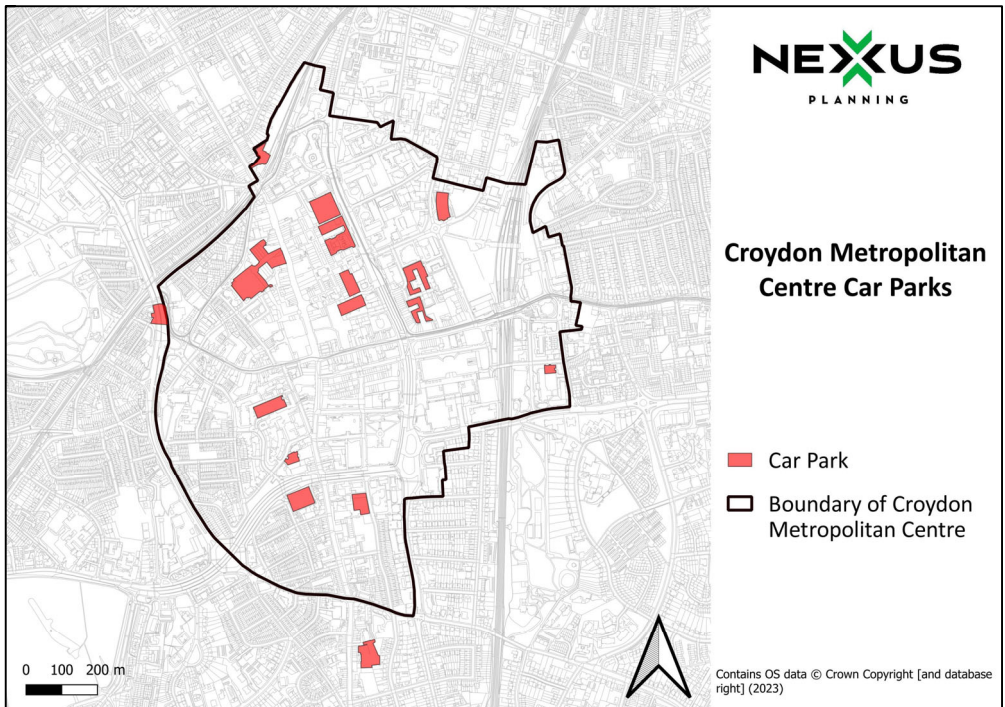
Figure 5.35.1 Map showing green spaces in and around CMC



### Car Parking

5.36 There are a number of car parks in CMC, however they are all quite high in cost. The largest car parks are Whitgift Centre, which has 1059 spaces and costs £3.20 per hour, Centrale Shopping Centre, which has 950 spaces and costs up to £5.50 for the day during the week and up to £10 a day at the weekend. Wandle Road has 1,021 spaces and costs up to £11 for eight hours.

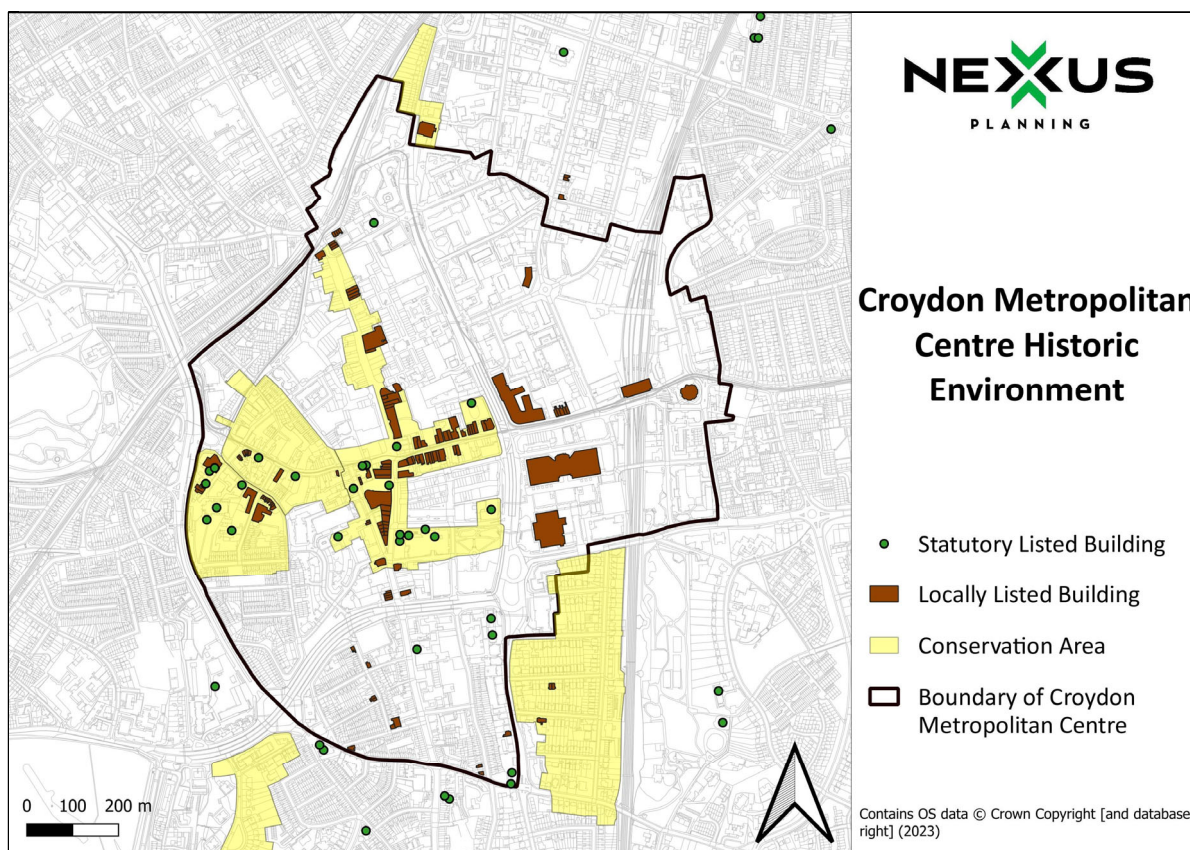
Figure 5.36.1 Map showing accessible car parks in Croydon



## Historic Environment

- 5.37 To the south of CMC there are a number of Grade I and Grade II listed buildings.
- 5.38 The Grade I listed Hospital of the Holy Trinity (Whitgift Hospital) is located on the corner of North End and George Street. The building was originally built by Archbishop John Whitgift as a school and hospital for those in poverty as a result of war and bad harvests, and is now used as sheltered retirement houses.
- 5.39 To the south-west of CMC are the Grade I listed Parish Church of St John the Baptist and Old Palace School. Old Palace School was formerly used as a summer palace by the Archbishop of Canterbury.
- 5.40 Despite there being a number of Grade I listed buildings, each with a significant history value, Croydon's historic environment is currently not renowned for attracting tourists. The Council is exploring the opportunities to further heritage supported regeneration in the Town Centre.

Figure 5.40.1 Map showing the historic environment in Croydon Metropolitan Centre



## Street Markets

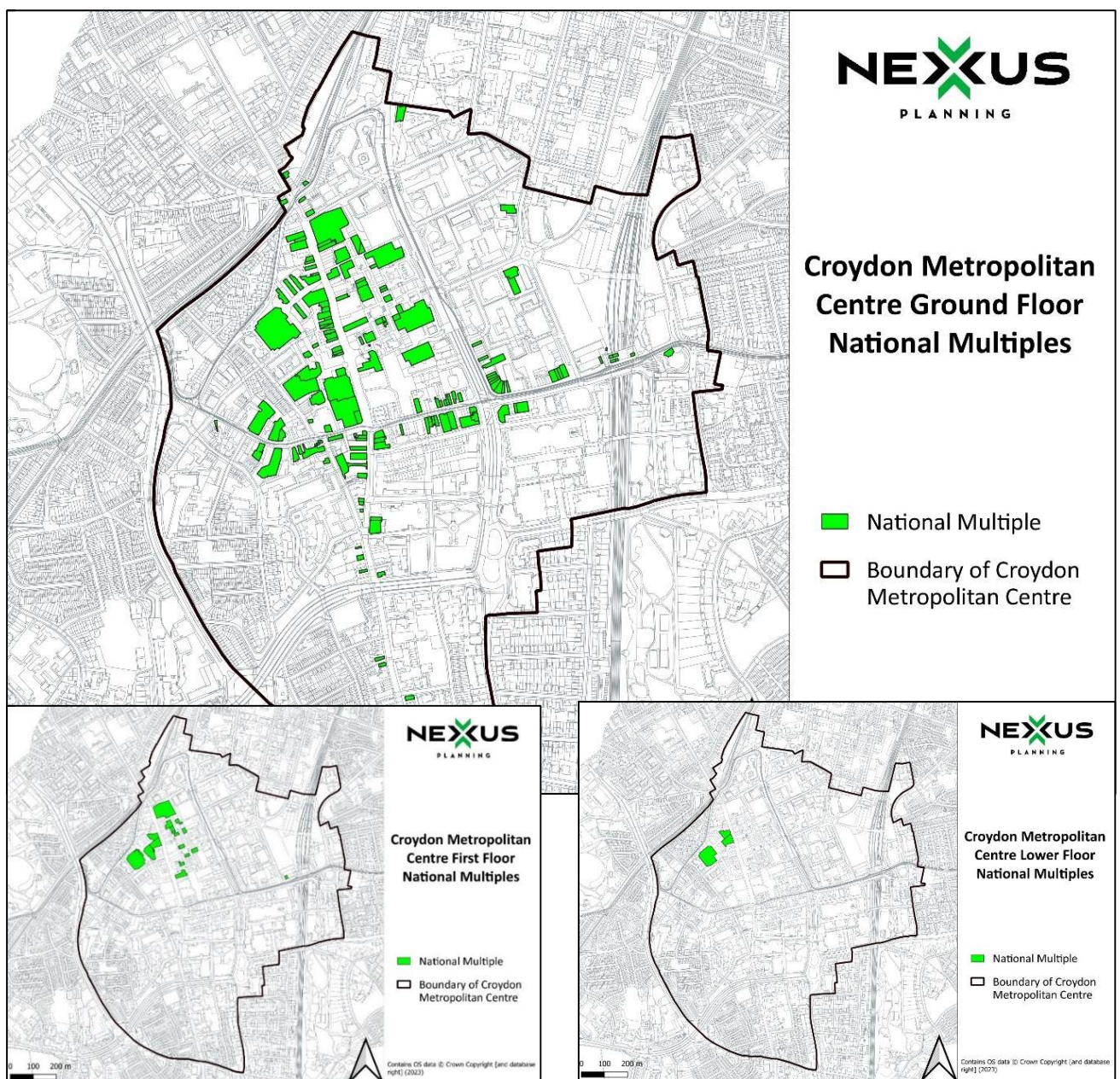
- 5.41 One of the oldest known markets in Britain, which has been trading since 1276 is located in Croydon Metropolitan Centre. Located along Surrey Street, Surrey Street Market, it is open every day with market stalls selling a wide variety of fresh food, flowers and comparison goods. In more recent years, street food stalls have started operating along Surrey Street, providing visitors with freshly made food from around the world.

5.42 In January 2023, it was reported that the Council had received an additional £600,000, on top of £500,000 funding acquired in 2022 for the renovation of Surrey Street Market<sup>29</sup>. Proposals for the market includes public realm improvement works which will see the carriageway made level and enhance the market’s design to make the street more pedestrian friendly by creating a more vibrant and flexible market space. Works will also include improved signage and street lighting, public art installations, and architectural lighting on building facades. The overall aim for these improvements is to drive additional footfall to the market.

5.43 Occasionally speciality markets are held along Croydon High Street, such as a continental market, and a Christmas market.

### National Multiples

Figure 5.43.1 Map showing the distribution of national multiples in Croydon



<sup>29</sup> [Spotlight on £1.1m Surrey Street market revamp, Develop Croydon, January 2023](#)



5.44 Only 24.3% of the retail offer in Croydon is considered to be a national multiple. After accounting for vacancies, this means that over 50% of the businesses in CMC would be considered independent, which is defined as having 8 units or less nationally. This is a positive, in terms of the uniqueness of the Centre’s offer.

### Crime & Safety

5.45 In the year ending March 2023, the crime rate in Croydon was lower than average for the London Boroughs within the Metropolitan Police force area.

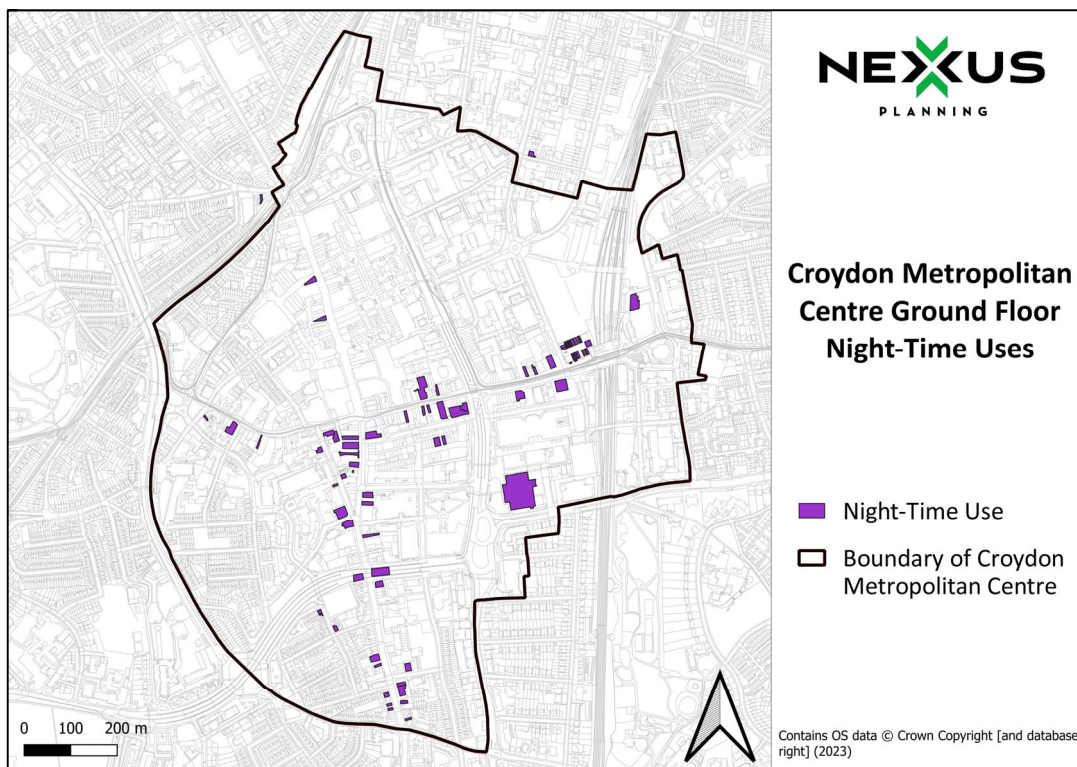
5.46 In July 2023, 592 crimes were reported in Croydon Metropolitan Centre, with a strong focus on crimes along North End and High Street. This figure is slightly more than the 569 crimes reported in Croydon Metropolitan Centre in July 2022.

5.47 When walking around Croydon, the levels of perceived safety were varied. Places such as the underpass along Wellesley Road and St Georges Walk felt unsafe in daylight hours, with the feeling of safety likely reducing in the evening. Additionally, in the two shopping centres in areas where there are no open shops and active shop frontages, it felt less safe, as if they could attract crime. Walking from East Croydon to George Street and around Surrey Street felt safe due to there being a high number of businesses, and significant passive surveillance from footfall.

### Night-time Economy

5.48 There are 88 businesses in Croydon that support the centres night-time economy which totals 9.8% of the centre’s composition. This includes businesses such as bars, restaurants, and cinemas, along with the businesses in Box Park and the Fairfield Halls. The night-time economy in Croydon is relatively weak, given the size of the centre. Undoubtedly the night-time economy has been one of the hardest hit through the pandemic and this reflects itself on Croydon, where a significant number of the vacant uses are former pubs, bars, cafes and restaurants.

Figure 5.48.1 Map showing the distribution of ‘night-time’ uses in Croydon Metropolitan Centre



## Public Investment

- 5.49 Croydon is currently undergoing significant transformation helped by the large number of public investment projects both planned and completed in recent years. In terms of public realm improvements, the High Street has been temporarily pedestrianised, and around CMC there have been ground art installations, urban greening, lighting installations as well as the opening of a parklet.
- 5.50 Around CMC, there has been a lot of investment in cycle infrastructure, creating safe cycle networks and providing secure cycle parking.
- 5.51 Queens Gardens re-opened to the public in July 2022 after a two-year transformation. As part of the works, a large children’s play area has been provided along with the planting of 39 new trees.
- 5.52 As mentioned in the events section, the Fairfield Halls reopened in 2018 following a £30 million redevelopment project to modernise the site. There were also works done around the site, including to Fairfield Gardens, to create an attractive arts centre in Croydon.
- 5.53 Within the next couple of years, improvement works to East Croydon Station are set to begin, including the addition of two platforms along with accessibility works in and around the station.

## Technological Enhancement

- 5.54 Croydon is using digital innovation and smart city technology to make the Borough and the public services on offer smarter and more sustainable.
- 5.55 The South London Partnership (SLP) is working with London Councils to deliver an exciting and innovative “Internet of Things” (IoT) project across the five south London Councils of Croydon, Kingston upon Thames, Merton, Richmond upon Thames and Sutton.
- 5.56 The funding will allow the SLP boroughs to deliver a multi-purpose IoT platform which will connect various sensors across borough boundaries. The project will use the IoT to obtain new data insights using internet-connected sensors, with minimal human intervention to support and drive economic growth across the sub-region. The project will bring together technology and places to create spaces that address challenges in our communities and opportunities to help people live better, healthier lives and live independently for longer. It could also deliver financial savings to boroughs.
- 5.57 Croydon also has a Love Clean Streets app which is a easy way for residents to report fly tipping, graffiti and other issues in the borough. The borough also provides residents with free digital learning guides that cover internet basics.

## Commercial Demand

- 5.58 Retailers looking to locate to CMC, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Ninja Warrior UK	Activity park	20,000	35,000
Shoezone	Shoe retailer	2,000	4,000
Co-op	Convenience store	1,000	5,000
Everyman Cinema	Cinema	8,000	15,000
Vapiano*	Euro-chic restaurant	3,500	12,000

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Mary Brown's	Fried chicken restaurant	1,500	2,200
Sense	Charity shop	1,200	6,000
Puttshack	Indoor mini-golf centre	15,000	20,000
Sleep 8	Bed, mattress and sleep technology retailer	2,000	8,000
FTY	Immersive football training centre	20,000	30,000
British Heart Foundation	Charity fashion and home stores	1,500	14,000
Gashapon	Capsule toy store	1,000	10,000
Heavenly Desserts	Dessert parlour	1,500	2,000
Majestic Wine	Retail chain specialising in wine	2,500	5,000
KFC	Fast food restaurant	1,200	2,500
Bodycare	Health & Beauty Supply Store	2,000	3,000
Sunshine Co	Sunbed chain	1,000	2,000
National Leisure Requirement	National Leisure Requirement	20,000	30,000
Donershack	German street food	2,750	4,000
Innkeeper's Lodge	Pub, Restaurant & Hotel	-	-
Miller & Carter	Steakhouse & Grill	3,000	6,000
Grape Tree	Health food store	1,250	-
Pets Corner	Pet retail store chain	1,200	2,500
Ember Inns	Public house	-	-
Zambrero	Healthy Mexican inspired food	800	2,000
Square Bubbles	Bubble Tea	500	800
Popeyes	Louisiana chicken restaurant	1,500	4,000
Tortilla	California-style Mexican food	1,000	2,500
Ready Burger	Plant-based burgers	2,500	3,000
Slamburger	Halal burger brand	1,750	2,500
Magnet	Trade kitchens and joinery	8,000	15,000
Chicktopia	Chicken based food to go and restaurant	800	1,500
12 <sup>th</sup> Street Burger	Burger & milkshake restaurant	800	1,500
Itsu	Sushi and hot food restaurant and take-away	1,500	3,000
Marugame Udon	Japanese noodle bar	1,500	4,000
Nisbets	Catering equipment and supplies	5,000	8,000
Sainsburys Local	Convenience Store	2,500	9,000
Sussex Beds	Bed Retailer	2,000	5,000
Angling Direct**	Fishing store	3,500	5,000
Taco Bell	Fast-food restaurant	1,200	2,500
Tesco	Convenience store	3,500	5,000
Pets at Home	Pet supplies retailer	5,000	10,000
ECigWizard	Electronic cigarette retailer	300	1,000

\*Vapiano is particularly looking for a premises around East Croydon

\*\*Angling Direct are particularly looking for a premises around South Croydon

## 6. Addiscombe Healthcheck

### Description

- 6.1 Addiscombe is a linear centre that is located to the east of Croydon Metropolitan Centre and comprises 102 units.
- 6.2 Full-scale composition plans for all District Centre are enclosed at **Appendix B**.

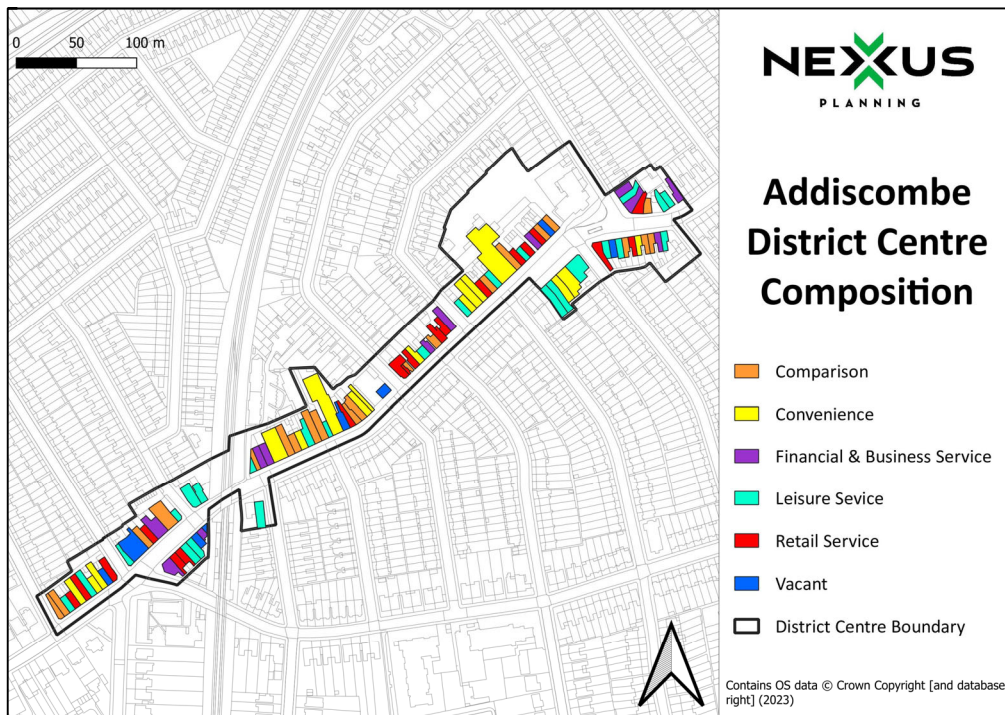
Figure 6.2.1 Photos of Addiscombe



Source: Nexus Site Visit (September 2023)

### GOAD Composition and Vacancies

Figure 6.2.2 Map showing composition of retail units in Addiscombe

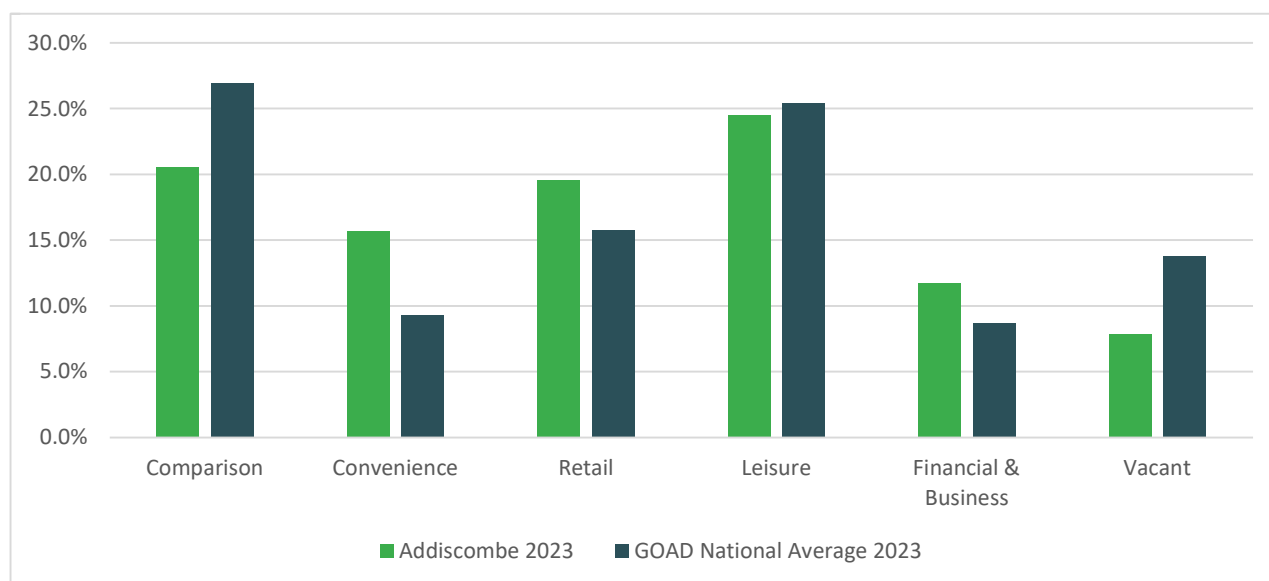


Source: Experian GOAD and Nexus Site Visit

Table 6.2.1 Addiscombe Composition Table

	Addiscombe 2023 (Total)	Addiscombe 2023 (%)	National Average 2023	Addiscombe 2019 (%)	National Average 2019
<b>Comparison</b>	<b>21</b>	<b>20.6%</b>	<b>26.9%</b>	<b>21.8%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>16</b>	<b>15.7%</b>	<b>9.3%</b>	<b>13.9%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>57</b>	<b>55.9%</b>	<b>49.9%</b>	<b>60.4%</b>	<b>49.5%</b>
<i>Retail</i>	20	19.6%	15.8%	21.8%	15.2%
<i>Leisure</i>	25	24.5%	25.4%	24.8%	24.5%
<i>Financial &amp; Business</i>	12	11.8%	8.7%	13.9%	9.8%
<b>Other Retail</b>	-	-	-	<b>2.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>8</b>	<b>7.8%</b>	<b>13.8%</b>	<b>2.0%</b>	<b>12.0%</b>
<b>Total</b>	<b>102</b>	-	-	-	-

Figure 6.2.3 Addiscombe Composition Graph



6.3 Addiscombe is a very popular centre, despite its proximity to Croydon Metropolitan Centre. The total numbers of units were typically above the national averages, besides comparison units which occupied 20.6% of the centre, well below the national average of 26.9%. 24.5% of units are occupied by leisure services, which was only slightly below the national average of 25.4%. Vacancy rates in Addiscombe were positively well below the national average. Only 8 units were vacant, 7.8% of all units, in comparison to the national average of 13.8%.

6.4 Since 2019, some of the composition of Addiscombe has remained the same, whilst in other areas it has fallen. Vacancy rates have significantly increased since 2019, reflecting national retail trends and higher national vacancy rates. However, the vacancy rate remains well below the national average. It is positive that the total number of convenience units has increased slightly and that leisure services have remained at an almost equal level.

## Transport & Accessibility

- 6.5 Addiscombe Tram Stop is located within the district centre, with frequent services to Wimbledon via East Croydon, Beckenham Junction and Elmers End. The tram takes 8 minutes to get to East Croydon, meaning that the train services from there are highly accessible to those living in Addiscombe. The 289, 312, 367 and 689 TfL bus routes run through Addiscombe, providing services every 10-20 minutes to Purley, Croydon, South Croydon, Elmers End, Norwood Junction and Bromley.
- 6.6 The linear nature of Addiscombe makes it easy for pedestrian movement. However, as Lower Addiscombe Road which runs through the centre is busy, an additional crossing point is recommended.
- 6.7 There used to be cycle lanes in Addiscombe, however improvement works to the road and pavements prioritised on street parking over the reinstatement of the cycle network. The cycle network does begin again outside of the centres boundary on both sides and there is some cycle parking throughout the centre.
- 6.8 There are no car parks in Addiscombe, with visitors needing to park along Lower Addiscombe Road. There are designated parking bays, mainly along the north side of the road that have a maximum stay of an hour.
- 6.9 Results from the household survey identified that 55.3% of visitors to Addiscombe accessed the centre by walking, suggesting that it is highly accessible for the local community. 27% of visitors accessed the centre by private vehicle, and 12.3% of visitors said they got there by bus. Despite there being a tram stop in Addiscombe, it was not a popular means of transport for accessing the centre.

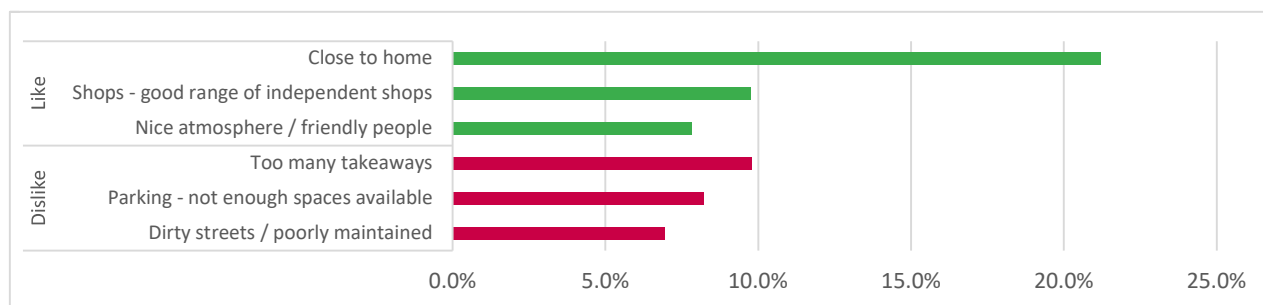
## Environmental Quality

- 6.10 There are no green spaces in Addiscombe, however there is a large park to the north of the centre called Ashburton Park.
- 6.11 The environmental quality in Addiscombe is low, however given the linear nature of the centre and often narrow paved areas, the level of greenery that has been achieved is good. Street furniture and street planters would be a possible solution to enhance the environmental quality.
- 6.12 Addiscombe is a relatively safe centre, with 28 crimes reported in July 2023. This figure is roughly the same as the total reported in July 2022. The linear nature of the centre, high amount of active frontages and good street lighting likely discourages high levels of crime in the area.

## Assessment

- 6.13 Results from the household survey identified the top likes and dislikes of Addiscombe, as seen below. It was found that the top like of Addiscombe was the centres proximity to people's homes. There were a number of dislikes raised about the centre including the number of takeaways, the lack of parking spaces, and the centre being poorly maintained.

Figure 6.13.1 Addiscombe Public Opinion



## Commercial Demand

6.14 Retailers looking to locate to Addiscombe, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Lidl	Supermarket	18,000	26,000
KFC	Fast food restaurant	1,200	2,500
The Range	Home, garden and leisure	25,000	40,000
Iceland	British supermarket chain	3,000	8,000

# 7. Coulsdon Healthcheck

## Description

7.1 Coulsdon is a large local centre, made up of 140 units and is the southernmost centre in the Borough.

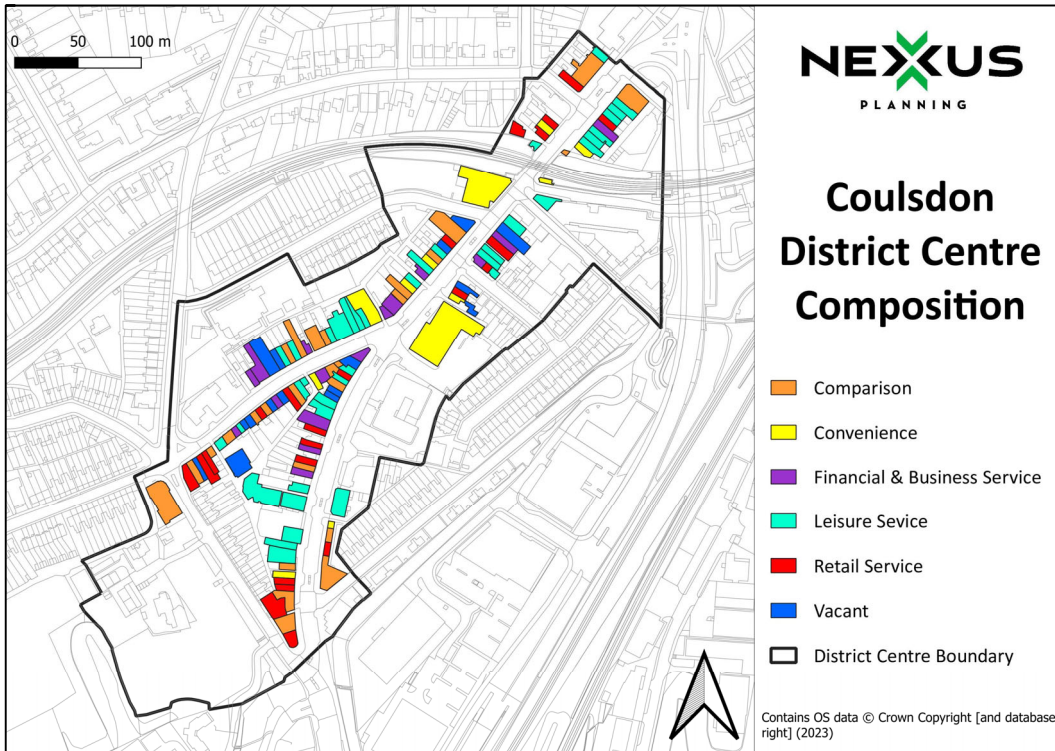
Figure 7.1.1 Photos of Coulsdon



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 7.1.2 Map showing composition of retail units in Coulsdon



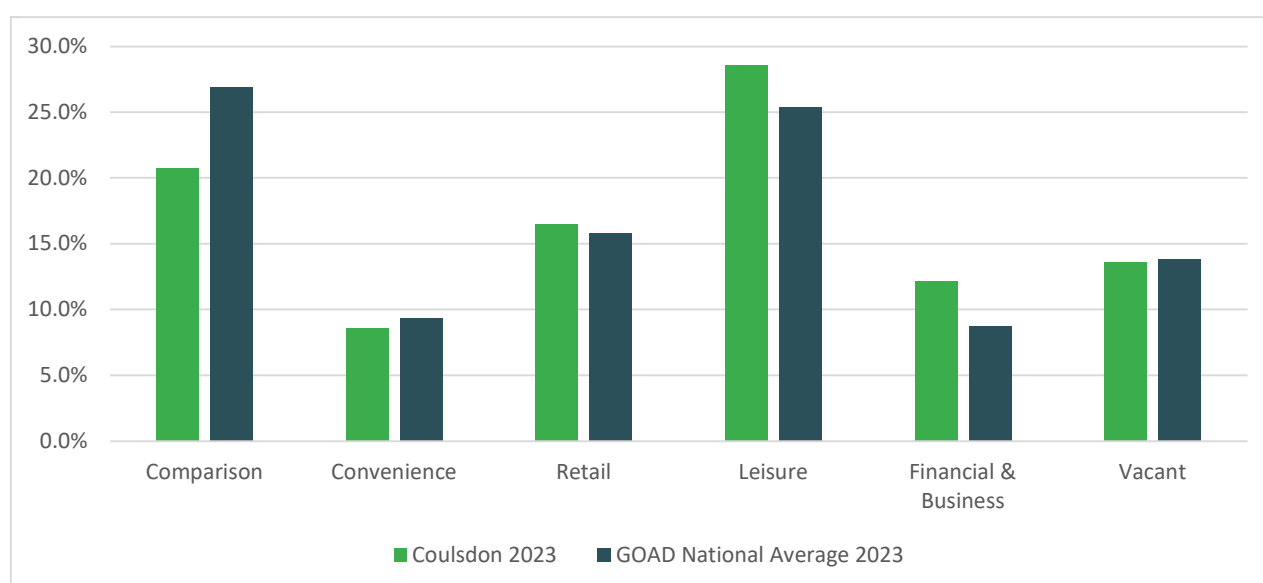
Source: Experian GOAD and Nexus Site Visit



Table 7.1.1 Coulsdon Composition Table

	Coulsdon 2023 (Total)	Coulsdon 2023 (%)	National Average	Coulsdon 2019 (%)	National Average 2019
<b>Comparison</b>	<b>29</b>	<b>20.7%</b>	<b>26.9%</b>	<b>20.7%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>12</b>	<b>8.6%</b>	<b>9.3%</b>	<b>8.0%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>80</b>	<b>57.1%</b>	<b>49.9%</b>	<b>55.3%</b>	<b>49.5%</b>
<i>Retail</i>	23	16.4%	15.8%	16.7%	15.2%
<i>Leisure</i>	40	28.6%	25.4%	26.7%	24.5%
<i>Financial &amp; Business</i>	17	12.1%	8.7%	12.0%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>19</b>	<b>13.6%</b>	<b>13.8%</b>	<b>16.0%</b>	<b>12.0%</b>
<b>Total</b>	<b>140</b>	-	-	-	-

Figure 7.1.3 Coulsdon Composition Graph



- 7.2 Despite being a local centre, the diversity of offer across the 140 units Coulsdon is wide enough to attract visitors for a variety of reasons.
- 7.3 The total number of units varies when compared to national averages. Comparison units occupy 20.7% of units, and convenience units occupy 8.6% of units. Both of these figures are below the national averages of 26.9% and 9.3% respectively.
- 7.4 Despite national trends regarding the loss of financial and business services, 12.1% of units in Coulsdon are occupied by business uses as such, compared to the national average of 8.7%. The total number of retail and leisure services in Coulsdon are both above national averages.

- 7.5 Positively, the vacancy rate in Coulsdon of 13.6% is below the national average of 13.8%. This suggests that there is a steady local economy, and positive use of the local centre.
- 7.6 Since 2019, the overall composition of Coulsdon has remained fairly even. On top of this, vacancy rates have also reduced in the centre. Part of this will be due to a spike of developments in Coulsdon, for example the redevelopment of vacant sites such as banks into residential dwellings

### Transport & Accessibility

- 7.7 Coulsdon is a large centre that is highly popular with local residents. At the time of visiting, a reasonably high level of footfall was observed.
- 7.8 Coulsdon is mainly accessed by bus with the TfL operated bus routes 60, 404, 405, 463, 633, N68, 166 and 434 running through the district centre. These routes provide services to Whyteleafe, West Croydon, Banstead, Epsom, Streatham, Mitcham, Croydon, Caterham, Redhill and Old Coulsdon. Services run between every 10-30 minutes.
- 7.9 Coulsdon Town and Coulsdon South Train Stations are both located just outside of the centre. At Coulsdon Town Station, there are half-hourly services to either Tattenham Corner or London Bridge. From Coulsdon South, there is a higher frequency of trains running to London Victoria, Peterborough via London Bridge, Horsham and Reigate.
- 7.10 Coulsdon is largely based around a triangular road network meaning that accessibility is fairly easy. Along the Brighton Road part of the centre, there are traffic calming measures in place with regular crossing points making it a safe area for pedestrian movement. The pavements are also wide and even.
- 7.11 There are no cycle lanes in Coulsdon, however there are some cycle routes signposted and there is also some provision of cycle parking.
- 7.12 There are two car parks in Coulsdon connected with Aldi and Waitrose supermarkets. The Waitrose car park is free for customers for a hour, and the Aldi car park is free for customers for 1.5 hours. Lion Green Car Park is located along Lion Green Road, adjacent to the centre and is a pay and display car park. The car park operates with emission-based parking charges, where people with a low or zero-emission vehicle receive large discounts on parking charges. Rates per hour vary from £0.15 to £1.50. Along Brighton Road and Chipstead Valley Road there is a large amount of on-street parking with a maximum stay of an hour parking.
- 7.13 Results from the household survey identified that the most common way of getting to Coulsdon was by private vehicle, with 52.3% of people indicating that this is their preferred mode of transport. Positively, 29.1% of people said that they walk to Coulsdon. Only 17.4% of people said that they get the bus into the centre.

### Environmental Quality

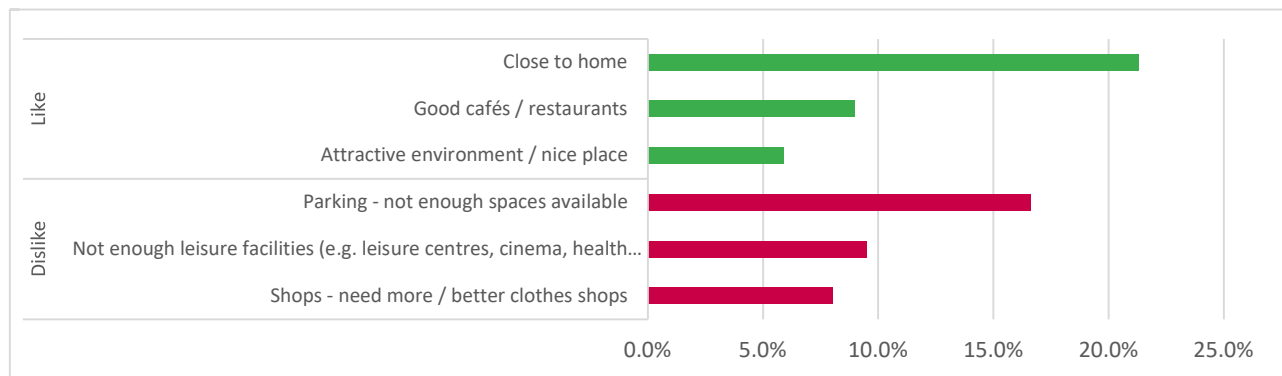
- 7.14 In Coulsdon, there are no green spaces within the centre, however in the surrounding area there are a number of large open green spaces.
- 7.15 Coulsdon District Centre has an overall strong environmental quality, with a large number of trees located around the centre, lining the streets. Outside Aldi there were a number of street planters observed, and this is something that could be wider implemented throughout the centre. Coulsdon would benefit from some more street furniture. The pavements are wide enough to facilitate benches, and the addition of such street furniture makes a centre much more attractive.

7.16 There were 33 crimes reported in Coulsdon in July 2023. This figure is slightly higher than the number of crimes reported in July 2022. This suggests that the centre is relatively safe, however measures could be put in place to improve safety.

### Assessment

7.17 Results from the household survey identified the top likes and dislikes of Coulsdon, as seen below. The top like of Coulsdon was found to be the centres proximity to home, whilst the top dislike was found to be the lack of parking in the centre.

Figure 7.17.1 Coulsdon Public Opinion



### Commercial Demand

7.18 Retailers looking to locate to Coulsdon, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Savers	Discount health & beauty retailer	2,000	3,500
Lidl	Supermarket	18,000	26,000
The Range	Home, garden and leisure	25,000	40,000
Topps Tiles	Tile and wood flooring specialist	2,500	8,000
M&S Food	British multinational retailer	6,000	25,000
Travelodge London	Hotel	10,000	40,000
Pets at Home	Pet supplies retailer	5,000	10,000

## 8. Crystal Palace (Upper Norwood) Healthcheck

### Description

- 8.1 Crystal Palace, often referred to as Upper Norwood, is a large, vibrant and quickly regenerating district centre located in the north of the borough with 220 units.

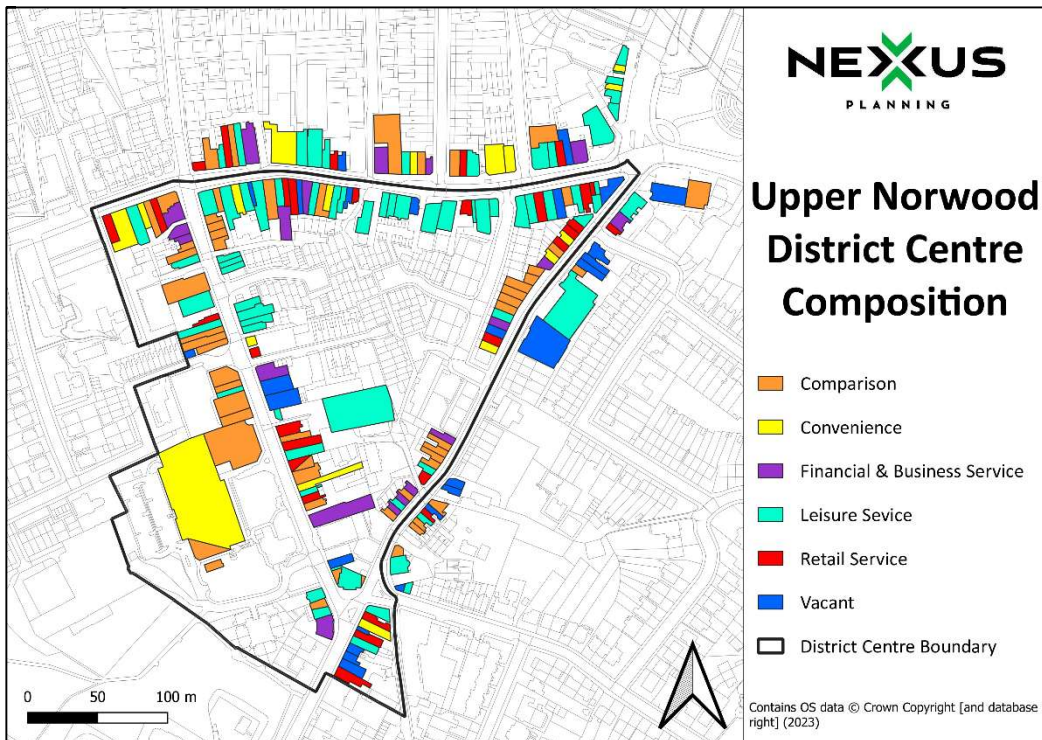
Figure 8.1.1 Photos of Crystal Palace



Source: Nexus Site Visit (September 2023)

### GOAD Composition and Vacancies

Figure 8.1.2 Map showing composition of retail units in Crystal Palace (Upper Norwood)

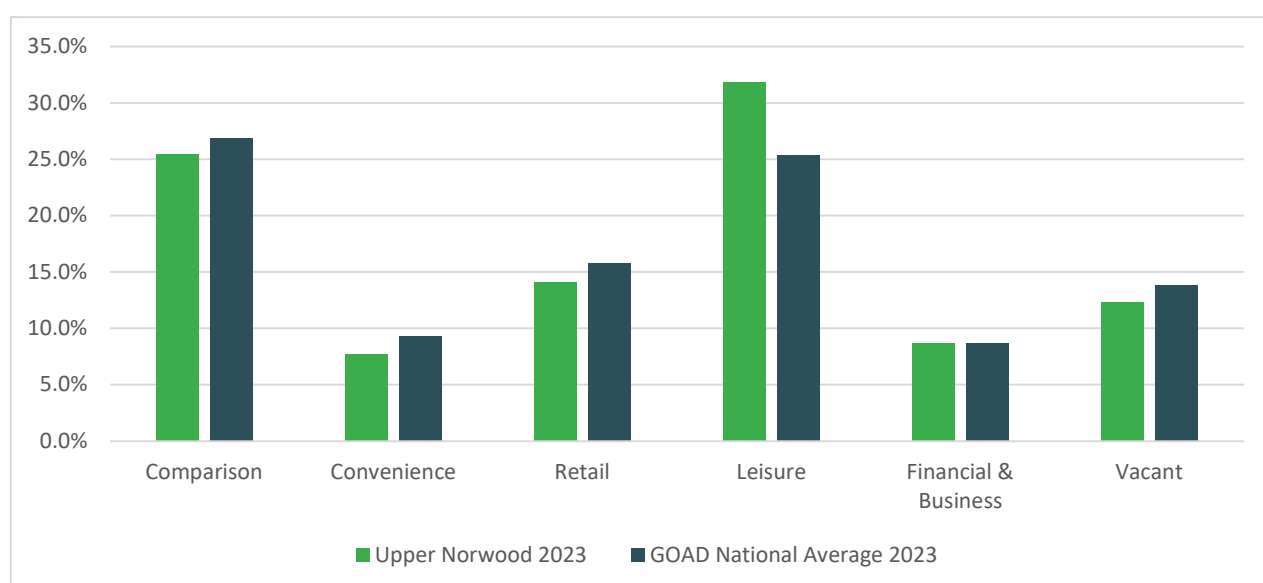


Source: Experian GOAD and Nexus Site Visit

Table 8.1.1 Crystal Palace Composition Table

	Crystal Palace 2023 (Total)	Crystal Palace 2023 (%)	National Average	Crystal Palace 2019 (%)	National Average 2019
<b>Comparison</b>	<b>56</b>	<b>25.6%</b>	<b>26.9%</b>	<b>24.1%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>17</b>	<b>7.8%</b>	<b>9.3%</b>	<b>6.2%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>120</b>	<b>54.8%</b>	<b>49.9%</b>	<b>55.6%</b>	<b>49.5%</b>
<i>Retail</i>	31	14.2%	15.8%	10.5%	15.2%
<i>Leisure</i>	70	32.0%	25.4%	34.6%	24.5%
<i>Financial &amp; Business</i>	19	8.7%	8.7%	10.5%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>27</b>	<b>12.3%</b>	<b>13.8%</b>	<b>14.2%</b>	<b>12.0%</b>
<b>Total</b>	<b>220</b>	-	-	-	-

Figure 8.1.3 Crystal Palace Composition Graph



- 8.2 The vibrancy of Crystal Palace is reflected in its strong unit composition. Comparison and Convenience units make up 25.6% and 7.8% of units in Crystal Palace respectively. Although these figures are below the national averages of 26.9% and 15.8% respectively, the difference is only marginal. Retail services again have a slightly lower than average percentage in the centre, with 14.2% of unites classified as such, compared to the current national average of 15.8%.
- 8.3 There is strong offer of Leisure services in Crystal Palace. The total unit composition is made up of 32% Leisure services, well above the national average of 25.4%.
- 8.4 Positively, only 12.3% of the units in Crystal Palace were vacant at the time of visiting, meaning that the centres vacancy rate is lower than national average of 13.8%.

- 8.5 Since 2019, there has been a positive increase in the number of comparison, convenience and retail services in Crystal Palace. However there has been a slight decrease in the number of leisure services and financial and business services. Positively, vacancy rates in the centre have reduced despite national retail trends and higher national vacancy rates.

### Transport & Accessibility

- 8.6 There is no train station located within the centre, however Crystal Palace Station is located just a short walk away. This is served by overground and rail services, similar to Norwood Junction. Overground trains run every 15 minutes to Highbury and Islington, whilst rail services to London Bridge, London Victoria, Beckenham Junction and West Croydon run on intervals that vary between 15 to 30 minutes.
- 8.7 Due to the one-way system in Crystal Palace, there are a limited number of bus stops, however there are a high number of bus routes that operate through the area. Along Westow Street, a bus stop that is situated by the War memorial is operated by the 450, 432, 249, 322 and 417 bus routes which provide services to Brixton, Anerley Station, Clapham, Clapham Common and West Croydon. A second bus stop on Westow Hill is operated by the same bus routes, however they go to different destinations such as Crystal Palace and Bell Green.
- 8.8 The one-way traffic movement around Crystal Palace, makes for safer pedestrian movement. There are regular crossing points and wide pavements throughout the centre.
- 8.9 The Sainsburys car park is the only off-street car park, however its use is restricted to customers. There is free on-street parking in the centre which is restricted for a maximum stay of one hour.
- 8.10 Results from the household survey found that the most popular way to get to Crystal Palace is by walking, with 34% of visitors doing so. Despite there being limited parking spaces in Crystal Palace, 32.9% of people access the centre by private vehicle. Getting to Crystal Palace by bus is slightly less popular than walking or private vehicle use, however a strong 29.5% of people access the centre by bus which is high in comparison to other district centres.

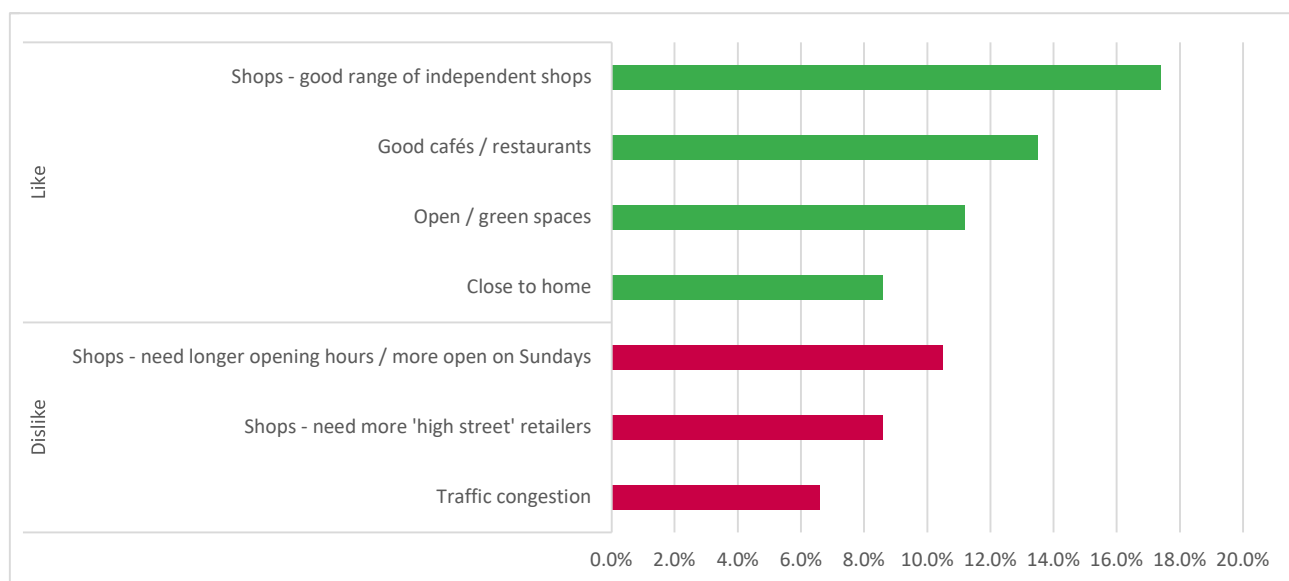
### Environmental Quality

- 8.11 There are no public green spaces in Crystal Palace, however the centre is located on the edge of the large, and historic Crystal Palace Park.
- 8.12 Around the centre there are areas where trees have been planted, typically around dwellings, whilst some businesses have added street planters outside their unit. Given the narrow streets around Crystal Palace, the addition of more street planters would be a viable option to improve the overall environmental quality of the centre.
- 8.13 In Crystal Palace, there were only a few public benches noticed in the centre, this is something that could be incorporated into street furniture that include planters.
- 8.14 The centre was observed as being clean, and only limited graffiti was noticed.
- 8.15 In July 2023, 50 crimes were reported in Crystal Palace. This total presents a significant change in the crimes in the area, in comparison to 31 that were reported in July 2022. It is possible that this month had a higher-than-average crime rate.
- 8.16 When visiting Crystal Palace, the centre felt safe due to a high number of active frontages and good street lighting.

## Assessment

- 8.17 Working in partnership with Loqiva, the local company behind PlaceApp which is a digital town hub connecting local people and businesses virtually. Croydon trialled an app for the Crystal Palace/Upper Norwood area. The app proved to be a success enabling the community to collaborate and help the local area to thrive and grow. The success of this app lead Croydon Council to trail similar apps in Purley, South Norwood and Thornton Heath, in the hopes they can be implemented throughout the entire borough.
- 8.18 There has been no recent public investment in Crystal Palace facilitated by Croydon Council. However, there have been recent improvements to the centre that were funded by other LPAs.
- 8.19 Crystal Palace Food Market is held every Saturday just outside of the centre’s boundary. The market is popular, and stalls sell a range of fresh produce, artisan goods and street food. Markets are also held occasionally at the Upper Norwood Library Hub, where traders can sell a variety of unique creations. In 2023, markets were held around Mothers Day, Summer and Black History Month, with proposed markets on the lead up to Christmas.
- 8.20 There are a couple of Grade II listed buildings in Crystal Palace, namely the Former Kennedy Shop, 20 Westow Hill, War Memorial and Church of St Andrew on Westow Street. Crystal Palace Park, located just outside of the centre’s boundary is a Grade II\* listed asset, and the park has a number of listed buildings and monuments within in.
- 8.21 The built form of Crystal Palace is characterful. The store fronts are on the most part tastefully designed to augment this.
- 8.22 Crystal Palace has a growing presence of local and regional events held in and around the centre. The centre is quickly growing in vibrancy which has seen a rise in large music events held locally at Crystal Palace Park. Events that are geared to the local community include walking tours, educational talks on topics such as inspirational women of the local area, and Christmas markets.
- 8.23 Results from the household survey identified the top likes and dislikes of Crystal Palace, as seen below. The top like was found to be the range of independent shops, whilst the top dislike was that the shops do not have long opening hours, and some are not open on Sundays.

Figure 8.23.1 Crystal Palace Public Opinion



## Commercial Demand

8.24 Retailers looking to locate to Crystal Palace, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Urban Pubs & Bars	Pubs & Bars	3,000	5,000
Traid	Recycled clothes charity	1,500	3,000
Anytime Fitness	24hr health and fitness club	3,500	8,000
Gails Bakery	Artisan bakery	1,400	4,000
Oodles	Oodles Noodles	700	1,200
Crisis	Charity shop	1,500	2,500
TK Maxx	Fashion retailer	10,000	30,000
Peachy Goat	Plant based bistro	2,000	2,500
Travelodge	Hotel	10,000	40,000
M&S Food	British multinational retailer	6,000	25,000
Pets at Home	Pet supplies retailer	5,000	10,000



# 9. New Addington Healthcheck

## Description

9.1 New Addington is a small local centre that is a vital asset to the local community and located to the east of the borough, comprising 56 units.

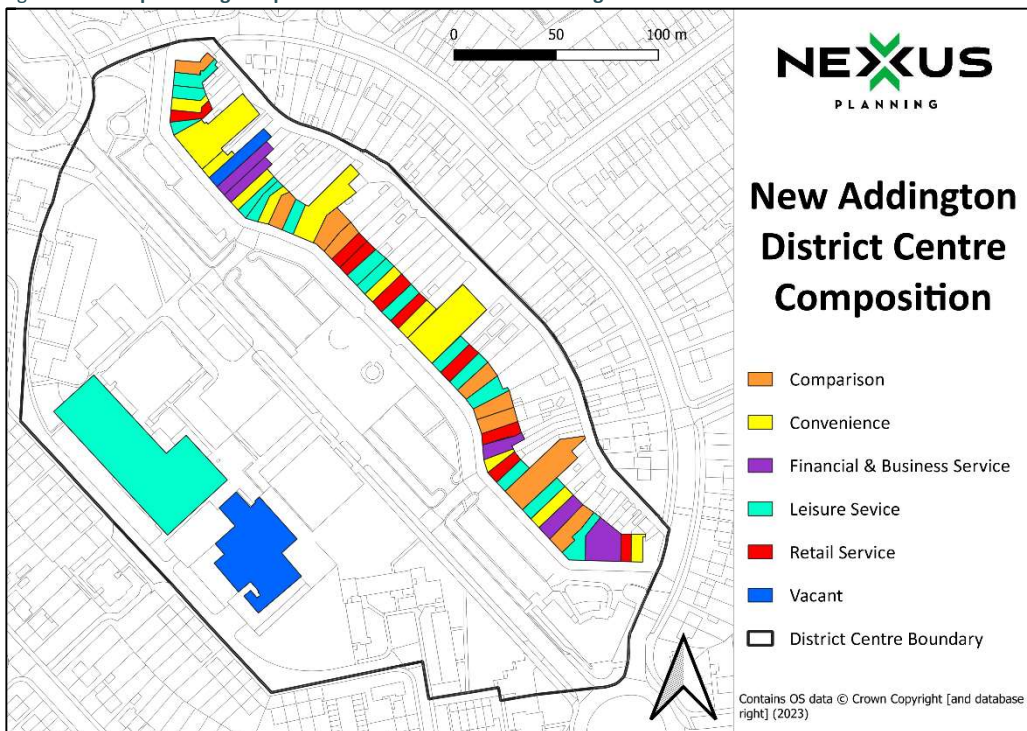
Figure 9.1.1 Photos of New Addington



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 9.1.2 Map showing composition of retail units in New Addington

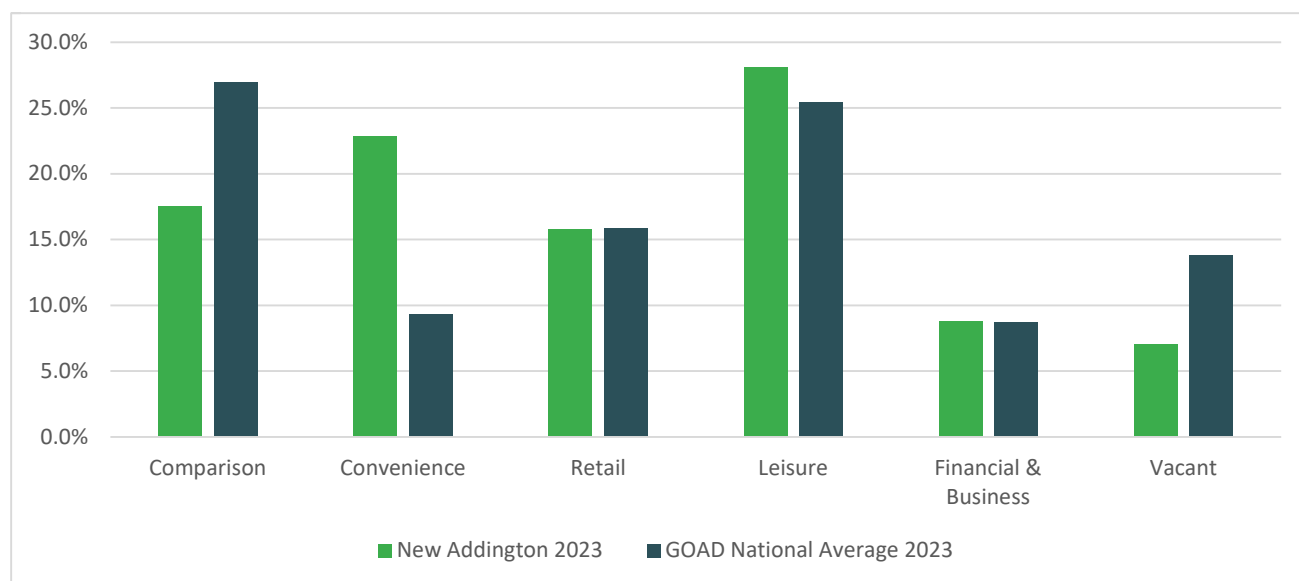


Source: Experian GOAD and Nexus Site Visit

Table 9.1.1 New Addington Composition Table

	New Addington 2023 (Total)	New Addington 2023 (%)	National Average	New Addington 2019 (%)	National Average 2019
<b>Comparison</b>	<b>9</b>	<b>16.1%</b>	<b>26.9%</b>	<b>18.5%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>13</b>	<b>23.2%</b>	<b>9.3%</b>	<b>20.4%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>30</b>	<b>53.6%</b>	<b>49.9%</b>	<b>53.7%</b>	<b>49.5%</b>
<i>Retail</i>	9	16.1%	15.8%	16.7%	15.2%
<i>Leisure</i>	16	28.6%	25.4%	25.9%	24.5%
<i>Financial &amp; Business</i>	5	8.9%	8.7%	11.1%	9.8%
<b>Other Retail</b>	-	-	-	-	<b>0.1%</b>
<b>Vacant</b>	<b>4</b>	<b>7.1%</b>	<b>13.8%</b>	<b>7.4%</b>	<b>12.0%</b>
<b>Total</b>	<b>56</b>	-	-	-	-

Figure 9.1.3 New Addington Composition Graph



- 9.2 New Addington is a small local centre yet is a vital community asset due to the location of New Addington in respect to the wider borough. In general, the composition of units in New Addington is in line with or above national averages. However, comparison units occupy 16.1% of units, which is significantly below the national average of 26.9%. Convenience units occupy 23.2% of units and leisure services occupy 28.6% of units. Both of these figures are well above the respective national averages of 9.3% and 25.4%.
- 9.3 Positively, only four units in New Addington were considered vacant at the time the health checks were conducted, with one of these units actively under alteration. This total makes up just 7.1% of the total of units in the centre, well below the national average of 13.8%.
- 9.4 Since 2019, there has been some change to the overall composition of New Addington. Vacancy rates have remained the same despite national retail trends and higher national vacancy rates. Despite a slight fall in the number of comparison,

retail service and financial and business services, the total number of convenience and leisure services in the centre has risen.

## Transport & Accessibility

- 9.5 In relation to the rest of Croydon, New Addington is fairly disconnected by public transport. New Addington is a final stop on the Tram network. Trams leave every 8 minutes, however it is a 28 minute tram ride to East Croydon Train Station.
- 9.6 The 64, 130, 464, 664 and 314 bus routes run through New Addington, providing services to Eltham, Tatsfield, Thornton Heath and Biggin Hill.
- 9.7 There are no cycle lanes in New Addington, however there is a high number of cycle racks in the centre which were in use at the time of visiting. The size and layout of New Addington lends itself to being highly accessible by bike for the local community.
- 9.8 The location of the retail and business units in New Addington is highly accessible due to them being in a central location, on one side of a road, and with a wide pavement outside.
- 9.9 In New Addington, there are 141 parking spaces along Central Parade outside of the retail and business units. Parking here is free for half an hour or £0.70 per hour. There is a small number of free one hour parking spaces to the south and north of the centre along Central Parade. There are also 49 additional spaces outside of Addington Swimming Pool which have the same cost per hour, of £0.70.
- 9.10 Due to the size of New Addington, and lack of public transport, a lot of visitors to the centre access it by private vehicle. Results from the household survey found that 32.6% of visitors do so. Bus is the second most popular way of getting to New Addington, with 26.3% of visitors using the bus network. Only 14.4% of visitors access New Addington by foot, which is low considering the central location of the retail centre which is in proximity to the area's dwellings.

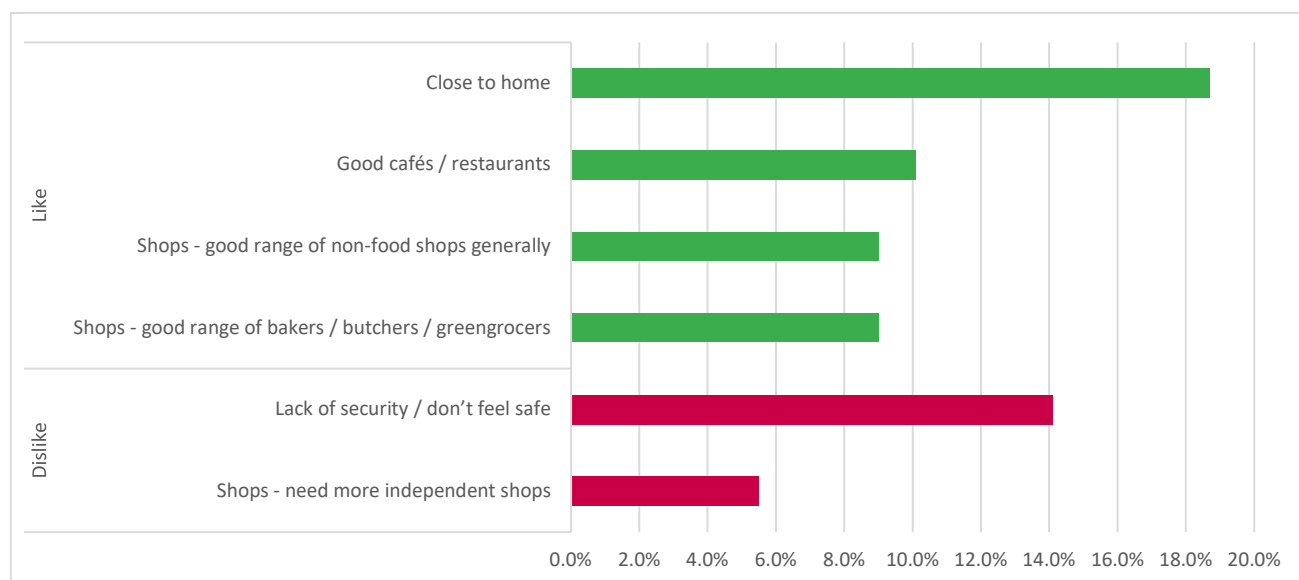
## Environmental Quality

- 9.11 New Addington is set within an area that is rich with open green space, which is also reflected within the environmental quality of the centre. There is a large, grassed area outside of the retail and business units in New Addington, making for a strong level of environmental quality in the centre. In addition to this space is a large number of trees surrounding the centre.
- 9.12 Some improvement would be recommended to improve the cleanliness of New Addington as litter was observed to be a problem. There was also some graffiti noticed.
- 9.13 As New Addington felt like a space where people stop to talk with friends and neighbours, more street furniture is recommended as a beneficial addition to the centre to facilitate social interactions.
- 9.14 Crime on a month-by-month basis in New Addington is highly variable. In July 2023, 24 crimes were reported in the centre, however in July 2022 there were 47 crimes reported. Both of these figures are respectively high given the small size of the centre. New Addington is a centre that would benefit from additional measures to combat the likelihood of crime such as youth groups, and increased police patrols.

## Assessment

- 9.15 New Addington Market is held every Tuesday and Friday between 7am to 3:30pm along Central Parade. A wide variety of traders operate from the market weekly. Additionally, a weekly indoor market is also held at New Addington Leisure Centre every Thursday which raises money for local community groups.
- 9.16 Since 2016, there has been a yearly summer carnival held over a weekend in New Addington. The carnival brings the community together and runs on donations rather than entry fees which has proven to be a successful model for an area where residents live in higher relative poverty in comparison to the rest of the borough. New Addington Carnival has children’s rides, community stalls, food and drink, and performances from local schools and groups. There is also usually a carnival procession held on the Sunday of the carnival.
- 9.17 A new leisure development was opened in New Addington in 2020 providing a modern leisure centre with a swimming pool and community space. This development was part of continual improvements to the area, with phase one including new trees and landscaping, a new pedestrian crossing outside the shops and a new skate and play area. Phase two included the installation of new lighting, renewing the paving surface and curbs outside the shops and improving the drainage system. Community engagement is currently underway to identify the priorities of phase three of the planned works.
- 9.18 Results from the household survey identified the top likes and dislikes of New Addington, as seen below. The top like of was found to be the centres proximity to where people live, whilst the top dislike of the centre was found to be the perceived lack of security and safety.

Figure 9.18.1 New Addington Public Opinion



## Commercial Demand

- 9.19 Retailers looking to locate to New Addington, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Toolstation	Tools & building supplier	3,800	6,000
Scope	Charity shop	1,500	2,000

<b>Occupier</b>	<b>Description</b>	<b>Size (min sq. ft)</b>	<b>Size (max sq. ft)</b>
Savers	Discount health & beauty retailer	2,000	3,500
Pets at Home	Pet supplies retailer	5,000	10,000

# 10. Norbury Healthcheck

## Description

10.1 Norbury is a large, linear district centre in Croydon, comprising 165 units and is located towards the north of the Borough.

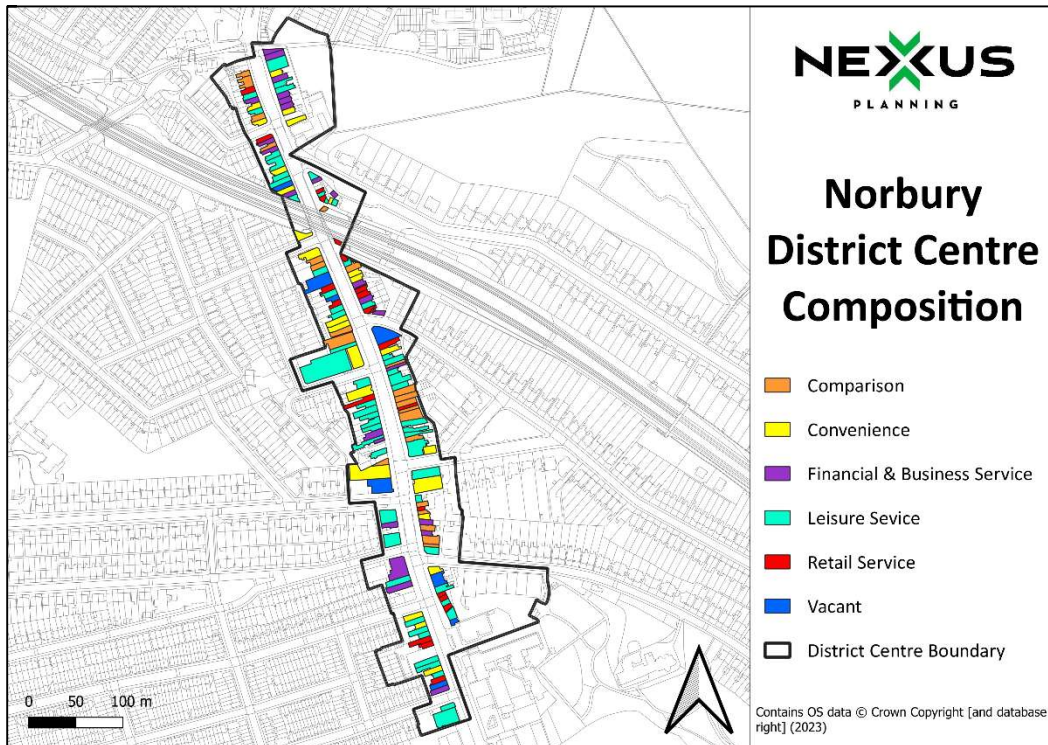
Figure 10.1.1 Photos of Norbury



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 10.1.2 Map showing composition of retail units in Norbury

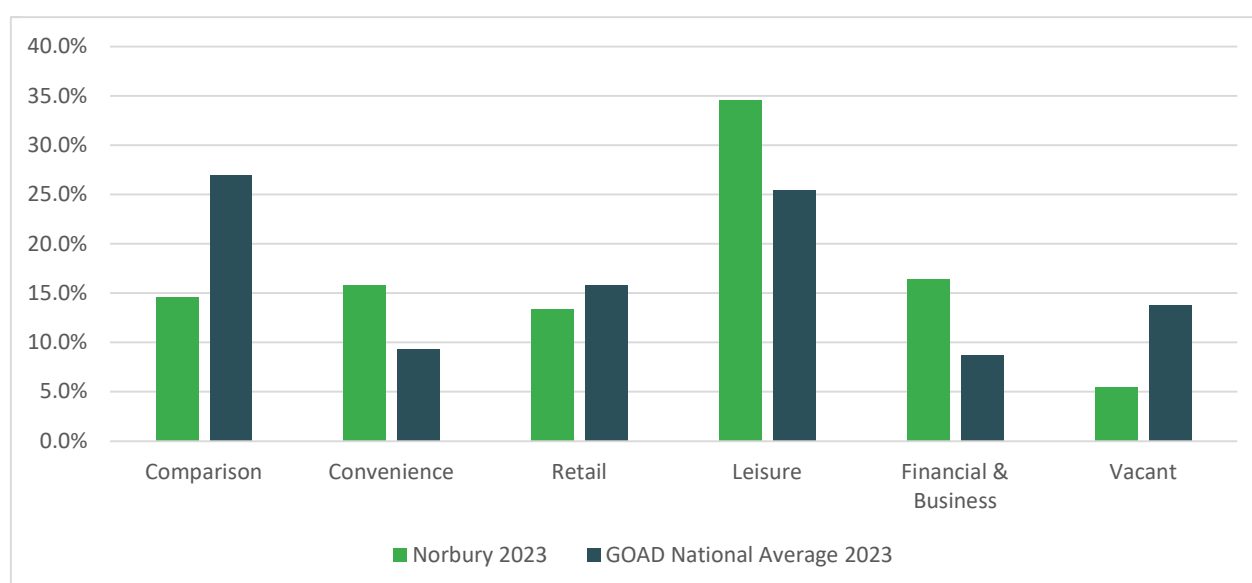


Source: Experian GOAD

Table 10.1.1 Norbury Composition Table

	Norbury 2023 (Total)	Norbury 2023 (%)	National Average	Norbury 2019 (%)	National Average 2019
<b>Comparison</b>	<b>24</b>	<b>14.5%</b>	<b>26.9%</b>	<b>11.7%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>26</b>	<b>15.8%</b>	<b>9.3%</b>	<b>14.0%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>106</b>	<b>64.2%</b>	<b>49.9%</b>	<b>62.0%</b>	<b>49.5%</b>
<i>Retail</i>	22	13.3%	15.8%	17.9%	15.2%
<i>Leisure</i>	57	34.5%	25.4%	29.6%	24.5%
<i>Financial &amp; Business</i>	27	16.4%	8.7%	14.5%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.6%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>9</b>	<b>5.5%</b>	<b>13.8%</b>	<b>11.7%</b>	<b>12.0%</b>
<b>Total</b>	<b>165</b>	-	-	-	-

Figure 10.1.3 Norbury Composition Graph



- 10.2 Norbury is anchored by Aldi at the north of the centre. Norbury’s composition varies when compared to national averages. Comparison units occupy 14.5% of the centre, well below the national average of 26.9%. Convenience uses are well above the national average, occupying 15.8% of the centre, while the national average is 9.3%. Retail services in Norbury are slightly below the national averages, while leisure services and financial and business services both exceed national averages.
- 10.3 Positively, the vacancy rate in Norbury is only 5.5%, which is under half of the national average figure for vacancies of 13.8%. This suggests that Norbury is a vital local centre popular with local residents.
- 10.4 Since 2019, there has been a general rise to the overall composition of Norbury. Vacancy rates have significantly improved despite national retail trends and higher national vacancy rates.

## Transport & Accessibility

- 10.5 Norbury is well connected by both train and bus services. Norbury train station is located within the centre at a central location with services roughly every 20 minutes to London Victoria and East Croydon. The centre can also be reached by the TfL operated 50, 109 and 255 bus routes, which provide services every 10 minutes to Stockwell, Brixton, Balham, Mitcham and Croydon.
- 10.6 The long, linear nature of Norbury means that there is a large local area that can access the centre by foot. Pedestrian movement around Norbury is facilitated by wide and even pavements, however given the high amount of vehicle movement along London Road, it was observed that there were limited crossing points.
- 10.7 Along London Road, which runs through Norbury, there are intermittent cycle lanes, however it was frequently observed that there were cars parked in the lanes. Improvements to the cycle infrastructure would be suggested to make it a safe means of transport for local residents.
- 10.8 There is a small amount of on street parking along London Road. On Monday to Saturday, it is only possible to park there for 30 minutes between 7am – 7pm, however it is free with unrestricted times around this.
- 10.9 Granville Gardens Car Park is located to the north of the centre and costs £1.50 per hour, but free on Sundays and weekdays after 6pm. There is also a large car park at Lidl, however it is reserved for customers of the supermarket.
- 10.10 Along the side roads that run off London Road, on-street parking is also available.
- 10.11 Results from the household survey found that positively, the most popular way for people to get to Norbury is on foot, with 47.4% of visitors indicating they do so. The next most popular way to get to Norbury is by private vehicle, with 30.8% of visitors accessing the centre in this way.

## Environmental Quality

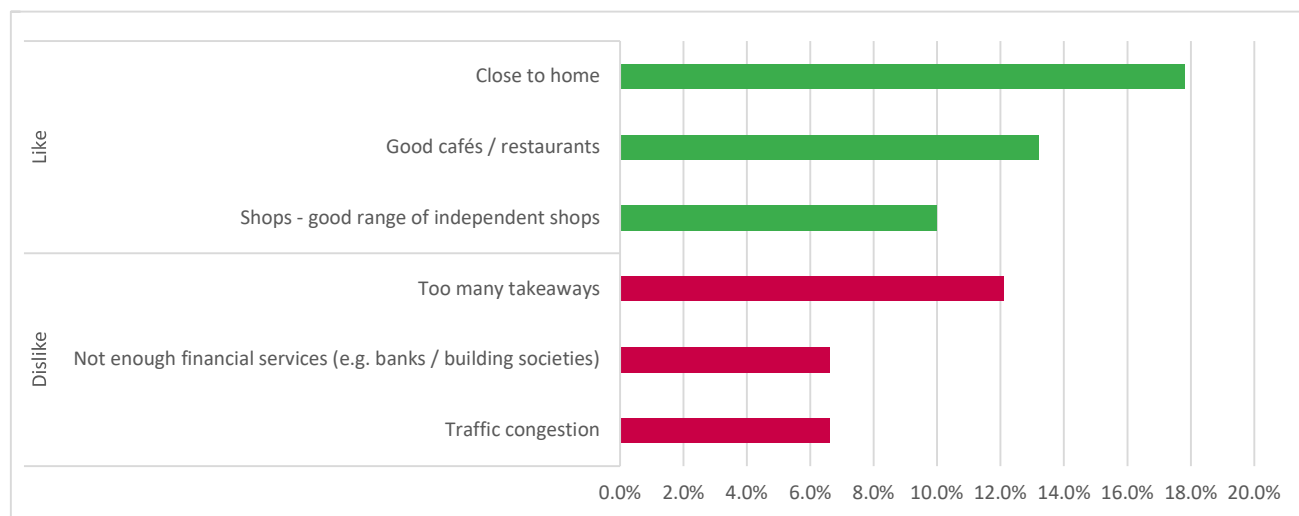
- 10.12 London Road is a very popular vehicular route for people driving into and out of Central London. As such, the environmental quality is limited due to the high traffic flows, however in areas there are a high number of trees that visually break up the pavement from the road. It would be beneficial if this planting was extended throughout the entire centre.
- 10.13 There was some litter in Norbury noticed, along with Graffiti, both reducing the environmental quality of the centre.
- 10.14 There are no green spaces within the centre's boundary, however just outside the centres boundary is Norbury Park which is a large open green space that has a BMX track and cricket field.
- 10.15 Norby has a high crime rate in respect to the rest of the boroughs district centres. In July 2023, 55 crimes were reported in the district centre which is on par with the 57 crimes that were reported in the previous period.
- 10.16 Despite this, Norbury was observed to have a good amount of street lighting and public and private CCTV cameras installed. This observation was made in the daytime, so it is likely the scenario changes in the evenings.



## Assessment

- 10.17 Norbury is a local centre, and as such only has a small offer of events which are mainly focused in attracting local residents. The Love Norbury website has an event page showing upcoming and past events. Events include coffee mornings, litter picks, and informative sessions such as scam awareness.
- 10.18 In Norbury, there are currently no street markets held. Historically, The Notorious Norbury Market & Fair was held once a month in a conference room at the now closed Norbury Night Club.
- 10.19 There are planned works to improve the area around Norbury Station, which is located centrally within the district centre. The centre also has been identified as an area for regeneration, however there are currently no plans in place relating to the proposed works.
- 10.20 There is one statutory listed building in Norbury, the Grade II listed former Barclays Bank which is located on the corner of London Road and Norbury Crescent. Norbury's built form varies in character as you move along London Road, with some buildings of merit along with post-war infill developments that do not augment the centres character.
- 10.21 Results from the household survey identified the top likes and dislikes of Norbury, as seen below. The top like was found to be the proximity of the centre to where people live, whilst the top dislike of the centre is the number of takeaways located there.

Figure 10.21.1 Norbury Public Opinion



## Commercial Demand

- 10.22 Retailers looking to locate to Norbury, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
GDK	Donor kebabs, sandwiches and burger restaurant	1,300	2,500
KFC	Fast food restaurant	1,200	2,500
Slamburger	Halal burger brand	1,750	2,500
Pets at Home	Pet supplies retailer	5,000	10,000

# 11. Purley Healthcheck

## Description

11.1 Purley is a large and rapidly growing centre in the Borough, with 156 units.

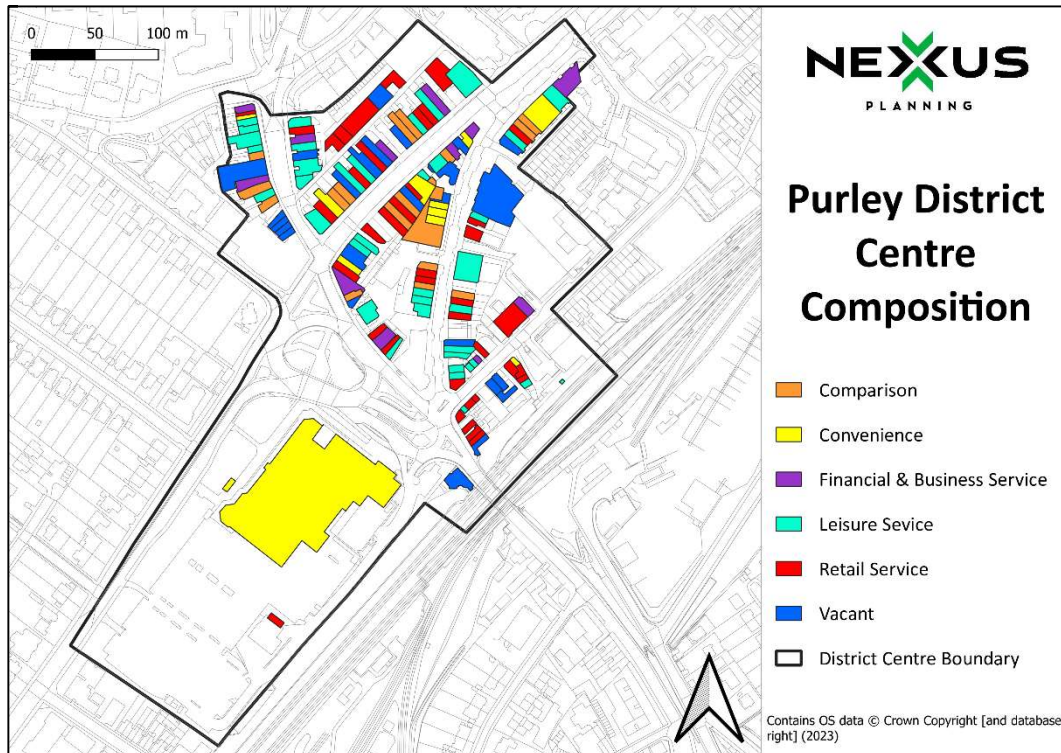
Figure 11.1.1 Photos of Purley



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 11.1.2 Map showing composition of retail units in Purley

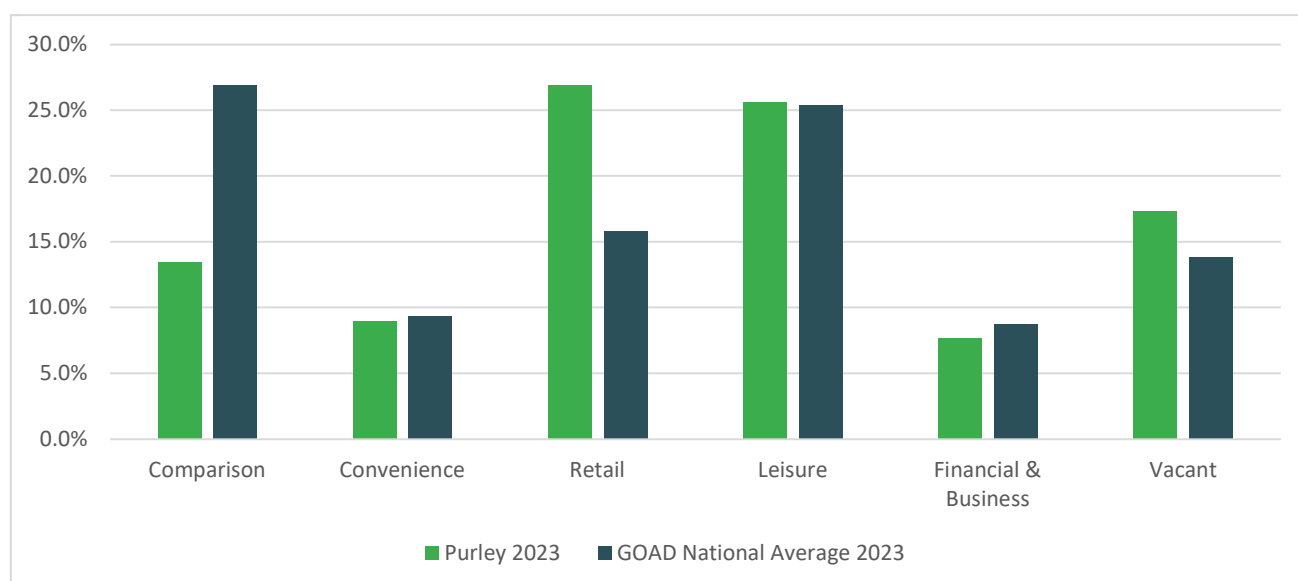


Source: Experian GOAD

Table 11.1.1 Purley Composition Table

	Purley 2023 (Total)	Purley 2023 (%)	National Average	Purley 2019 (%)	National Average 2019
<b>Comparison</b>	<b>21</b>	<b>13.5%</b>	<b>26.9%</b>	<b>14.8%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>14</b>	<b>9.0%</b>	<b>9.3%</b>	<b>7.4%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>94</b>	<b>60.3%</b>	<b>49.9%</b>	<b>65.1%</b>	<b>49.5%</b>
<i>Retail</i>	42	26.9%	15.8%	26.2%	15.2%
<i>Leisure</i>	40	25.6%	25.4%	26.8%	24.5%
<i>Financial &amp; Business</i>	12	7.7%	8.7%	12.1%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>27</b>	<b>17.3%</b>	<b>13.8%</b>	<b>12.8%</b>	<b>12.0%</b>
<b>Total</b>	<b>156</b>		-	-	-

Figure 11.1.3 Purley Composition Graph



- 11.2 The unit composition in Purley is fairly low in comparison with national averages. Comparison uses make up 13.5% of the total number of units in Purley, which is significantly below the national average of 26.9%. The total number of convenience uses is in line with the national average, with a large Tesco supermarket anchoring Purley. Leisure services are also on par with national averages in Purley. The total number of financial and business service uses are slightly below the national averages, however, positively there is a very strong mix of retail service uses in the centre.
- 11.3 17.3% of units in Purley are vacant, which exceeds the national average of 13.8%, however with the proposed redevelopment of Purley Leisure Centre, there will hopefully be a positive turnaround of vacancy in the centre.
- 11.4 Since 2019, there has been, for the most part a slight decline in unit composition in Purley. Whilst vacancy rates have risen to a rate that is well above the national average.

## Transport & Accessibility

- 11.5 Purley Train Station is located just outside of the district centre boundary. The station has a high frequency of trains to London Bridge and London Victoria Train Stations, all stopping at East Croydon, as well as services running south to Reigate, Caterham and Gatwick Airport.
- 11.6 Purley has a high frequency of bus services. The TfL operated 127, 412, 289, 455, 407, 434, 127, 60, 466, 359, 166 and 405 busses frequently run through Purley, providing services to Coulsdon, Elmers End, Tooting Broadway, Sutton, Wallington, Croydon, Whyteleafe, Caterham, Addington Village, Redhill and Streatham.
- 11.7 A cycle lane starts in Purley that runs into Croydon Metropolitan Centre. This cycle lane has recently been improved to make it safer for users. Additionally, there is a high amount of cycle parking in the centre.
- 11.8 Given the location of the centre in respect of the wider built-up area, pedestrian accessibility around Purley has been designed to be as easy as possible for visitors, The Tesco car park is a popular place for visitors to park with a pedestrian underpass leading from the car park to the shops and businesses along Brighton Road. However, at times the underpass floods and sometimes attracts rough sleeping, both compromising the feeling of safety for users.
- 11.9 There are fairly regular crossing points along Brighton Road, the one-way flow of traffic along High Street has meant that it is safe for pedestrians. Along Russell Hill Road, pedestrian movement is restricted due to the road being wide and having a high level of vehicular traffic using it.
- 11.10 There is a large car park at Tesco, with 572 spaces, located to the south of the centre, that offers three hours free parking for visitors. You do not need to shop in the supermarket to receive free parking. This centre is attractive for visitors due to it being free, despite it being located slightly out of the centre.
- 11.11 To the north of Brighton Road, behind the businesses is a small 55 space car park on Russell Hill Place, which is again £1.50 an hour. This car park is free on Sundays and after 6pm. There is a large multi-storey car park located along Whytecliffe Road with 412 spaces. This car park is located next to the former leisure centre, and costs £1.50 per hour to park. This car park is free on Sundays and after 6pm. There is no parking available along Brighton Road but there is some on street parking along High Street, which is free with a maximum stay of one hour.
- 11.12 Results from the household survey found 62.2% of visitors to Purley access the centre by private vehicle. This is likely due to the centre attracting people from the wider Croydon area, as well as the built-up area of Purley spanning a large area that is not walkable. 22.2% of visitors to the centre did however say that they get there by walking. Despite Purley having a good bus network, only 12.1% of visitors said that they get there by bus.

## Environmental Quality

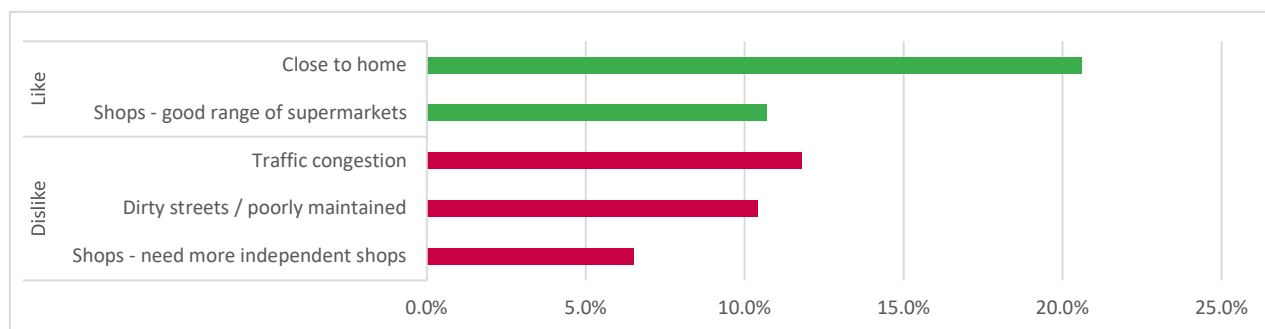
- 11.13 The green environment in Purley is limited, but along High Street there are several trees along with hanging baskets on some lamp posts. There are no public green spaces within Purley, however just north of the centre is Rotary Field which is a large green space with a children's playing area.
- 11.14 The overall environmental quality in Purley would benefit from improvement. Some street furniture was observed but some more would be encouraged around the centre. The area around the Downlands Shopping Precinct requires some major improvement. It is a pedestrian link from High Street to Brighton Road, however at the time of visiting the ceiling of the walkway was falling down and some temporary barriers that had in fact been moved to allow access were in place. The shops here were also largely empty but they are centred around a small square area that could be vibrant for the local community if improvements were made to the public realm.

- 11.15 The centre did have some litter noticed, along with some graffiti, mainly in areas where there were vacant units.
- 11.16 In July 2023, there were 35 crimes reported in Purley, which is significantly below the 63 crimes reported in July 2022. This is a positive improvement for the centre as 35 crimes is relatively low given the size of the centre. Brighton Road felt safe with a good number of active frontages and street lighting. There were however some corners of Purley that had a concentration of vacant units or corners that were out the way of the general public and felt unsafe. Additionally, the underpass from Tesco would benefit from lighting to improve safety in the evening.

## Assessment

- 11.17 Working in partnership with Loqiva, the local company behind PlaceApp, Croydon Council are piloting an app in Purley called inPurley. The app virtually creates a digital town hub which is a place where the community collaborates to help Purley thrive and grow.
- 11.18 The leisure provision in Purley declined in 2020 after the closure of Purley Leisure Centre. Despite a massive amount of local opposition to the closure, with more than 3,000 people signing a petition to keep it open, it was decided that the leisure will not re-open. However, in June 2023 it was revealed that it is anticipated that a planning application will be submitted to redevelop the former leisure centre site to provide a new leisure centre as well as new homes, including homes for older people, shops and a public square. The new leisure centre is proposed to include a six-lane main pool, training pool, fitness studio and gym as well as a soft play area and a café.
- 11.19 The Purley Strategic Regeneration Framework is currently in its draft stages and has been prepared by the council in consultation with residents, businesses and other stakeholders in Purley. The non-statutory guidance for development and investment in Purley District Centre encourages sustainable and high-quality growth, enhancing the district centre through residential mixed use intensification, better streets and public spaces and a shift in movement hierarchy towards priorities to promote more walking and cycling. Once adopted, this guidance should hopefully form a basis for future development and investment in Purley to further enhance the centre.
- 11.20 In September 2023, the Purley Community Festival was held on Rotary Field in Purley. This weekend-long event was filled with food and drink, live music, and entertainment for children such as face painting and a bouncy castle. It was estimated that over 2,500 people attended the event. Purley Community Festival has been held to various degrees for almost a decade.
- 11.21 In early 2022, a monthly street market was announced for Purley, which was held outside the leisure centre and along the High Street. However it only lasted a couple of months before being postponed until further notice.
- 11.22 Results from the household survey identified the top likes and dislikes of Purley, as seen in Figure 11.22.1. It was found that the main reason people like Purley is due to the centre's proximity to their home, whilst traffic congestion and the centre being poorly maintained are the main reasons people dislike Purley.

Figure 11.22.1 Purley Public Opinion



## Commercial Demand

11.23 Retailers looking to locate to Purley, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Scope	Charity shop	1,500	2,000
Savers	Discount health & beauty retailer	2,000	3,500
Lidl	Supermarket	18,000	26,000
KFC	Fast food restaurant	1,200	2,500
The Range	Home, garden and leisure	25,000	40,000
Camile Thai	Thai food retailer	900	1,500
The White Brasserie Company	Brasserie Restaurant	4,000	-
M&S Food	British multinational retailer	6,000	25,000
Pets at Home	Pet supplies retailer	5,000	10,000

## 12. Selsdon Healthcheck

### Description

12.1 Selsdon is a small centre with a local offer in the south of the Borough with 64 units.

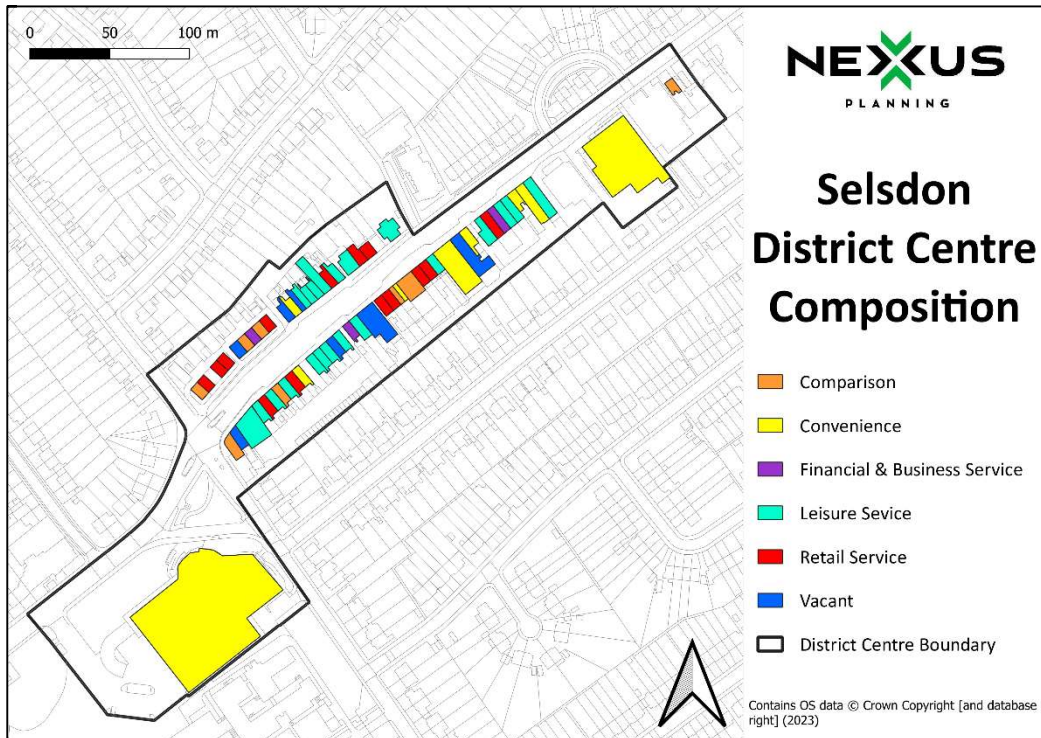
Figure 12.1.1 Photos of Selsdon



Source: Nexus Site Visit (September 2023)

### GOAD Composition and Vacancies

Figure 12.1.2 Map showing composition of retail units in Selsdon

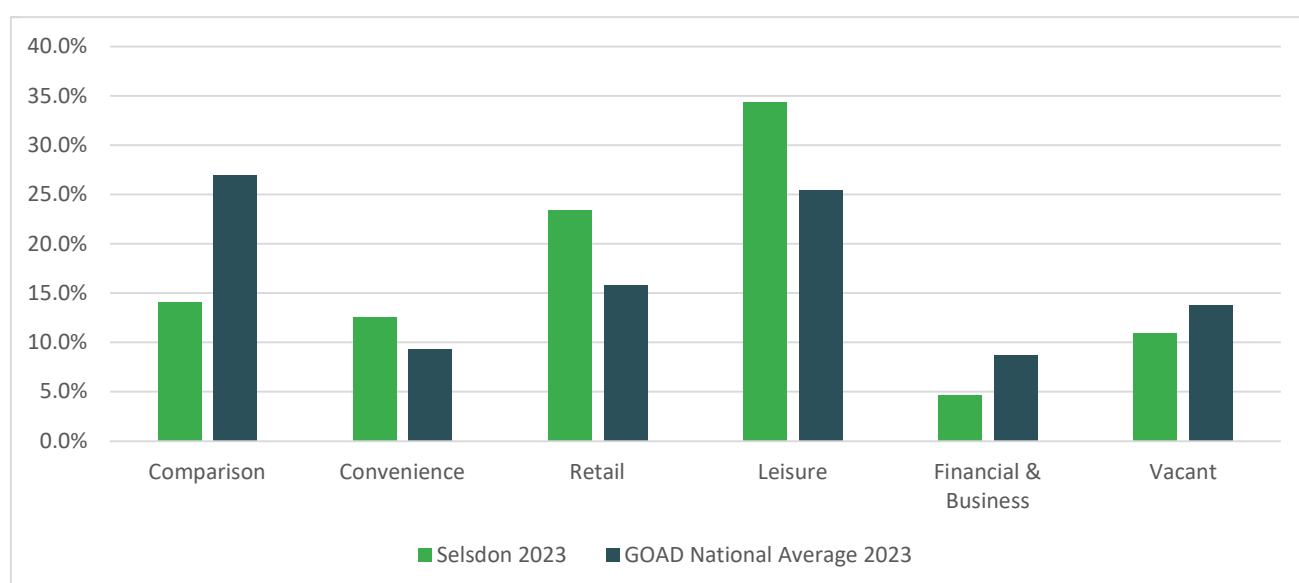


Source: Experian GOAD

Table 12.1.1 Selsdon Composition Table

	Selsdon 2023 (Total)	Selsdon 2023 (%)	National Average	Selsdon 2019 (%)	National Average 2019
<b>Comparison</b>	<b>9</b>	<b>14.1%</b>	<b>26.9%</b>	<b>14.3%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>8</b>	<b>12.5%</b>	<b>9.3%</b>	<b>11.4%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>40</b>	<b>62.5%</b>	<b>49.9%</b>	<b>61.4%</b>	<b>49.5%</b>
<i>Retail</i>	15	23.4%	15.8%	25.7%	15.2%
<i>Leisure</i>	22	34.4%	25.4%	28.6%	24.5%
<i>Financial &amp; Business</i>	3	4.7%	8.7%	7.1%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>7</b>	<b>10.9%</b>	<b>13.8%</b>	<b>12.9%</b>	<b>12.0%</b>
<b>Total</b>	<b>64</b>	-	-	-	-

Figure 12.1.3 Selsdon Composition Graph



- 12.2 Selsdon is anchored by a Sainsbury’s supermarket to the south-west of the centre, with an Aldi located to the north east. Selsdon is occupied by 12.5% convenience units, which is above the national average. There is also a high amount of retail and leisure services in the centre, with totals again above national averages. The number of comparison and financial and business services are both significantly below national averages.
- 12.3 Positively, it was observed that Selsdon only had 7 vacant units when visiting, making up 10.9% of all units. This total is below the national average of 13.8% indicating that Selsdon is an essential and well used centre by local residents.
- 12.4 Since 2019, there has been change to the overall composition of Selsdon. Vacancy rates have improved despite national retail trends and higher national vacancy rates. There has been a slight fall in the number of comparison and retail service units, whilst there has been a rise in convenience, and leisure service units. Selsdon has however suffered a substantial



loss of financial and business services with Barclays bank closing in November 2020 and Nationwide closing around a similar time.

## Transport & Accessibility

- 12.5 When considering public transport access, Selsdon can only be reached by bus. The TfL operated 64, 359, 433 and 412 bus routes run through Selsdon, providing services to Purley, Croydon, Addington and Thornton Heath. The 433 is the most frequent running bus, with services roughly every 10 minutes, with the other routes running at 15-30 minute intervals. The 409 bus route also runs through Selsdon on an hourly basis providing a service to East Grinstead. This service is not operated by TfL, and as such comes at a higher cost to users.
- 12.6 Selsdon is not particularly accessible for cyclists, with no cycle lanes. However, outside Sainsburys there are a number of cycle racks, with a few others located at various points along Addington Road.
- 12.7 Pedestrian accessibility around Selsdon is fairly easy, however there is a large distance along Addington Road where the shops are with no crossing point. Additionally, there is no pedestrian crossing near to the Aldi at the east of the centre, where the road is frequently crossed in dangerous ways by shoppers walking home or going to the bust stop.
- 12.8 There are some residential areas of Selsdon that cannot easily access the centre due to the local terrain. However, the 433 bus route covers a majority of the area, making it an accessible shopping location for a majority of residents.
- 12.9 There are car parks at Sainsbury's and Aldi supermarkets located at the east and west of Selsdon. Parking here is free of charge but limited to two hours. There is also parking along Addington Road outside the shops and businesses, but there is a maximum stay here of 1 hour and a ticket must be displayed. Given the size of Selsdon, there is adequate parking for the number of visitors the centre gets.
- 12.10 Results from the household survey identified that 59.5% of visitors to Selsdon got there by private vehicle, making it the most popular means of transport to access the centre. This could be due to the Sainsbury's and Aldi supermarkets that anchor the centre. Positively, 26.5% of visitors get there by walking.

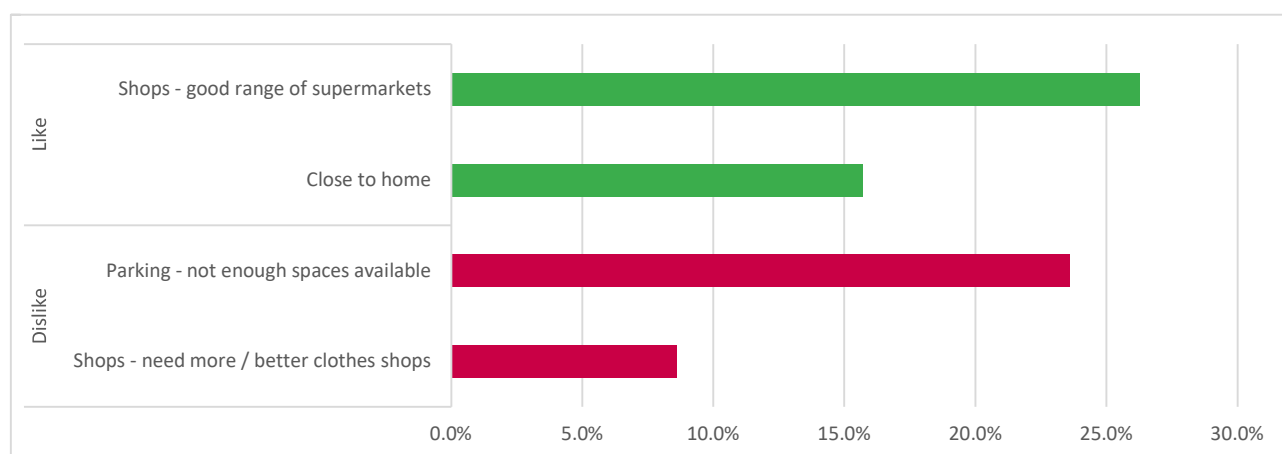
## Environmental Quality

- 12.11 There are no public green spaces within Selsdon, however Selsdon Recreation Ground is located nearby. Just outside of Sainsburys is a small area that has been landscaped with grassed areas and trees along with some benches for pedestrians. This area is mainly used by people to walk from Sainsburys to the shops and businesses in Selsdon and significantly improves the green environment.
- 12.12 Beyond green spaces, there is limited greenery in Selsdon, with just a few planters and hanging baskets along Addington Road.
- 12.13 Besides the green environment in the centre, Selsdon has a moderate environmental quality. There is a bit of graffiti in the centre, but on the most part it is clean. The only street furniture is found outside Sainsburys, additional street furniture along Addington Road would be beneficial.
- 12.14 Selsdon is a relatively safe centre in the borough, with only 27 crimes reported in July 2023. However, this figure is significantly up from just 10 crimes reported in July 2022. The centre has a good amount of active frontages, as well as being well lit by street lighting. Some CCTV was observed in the centre.

## Assessment

- 12.15 Selsdon Community Centre, Hall and Library are located in the same complex as Sainsbury's. Selsdon Hall holds local events such as amateur play productions and craft markets. Selsdon community hub is an important facility for local residents.
- 12.16 In Selsdon every year, there is a large event for local residents involving the switching on of the Christmas Lights along Addington Road.
- 12.17 There are no statutory listed buildings in Selsdon. However, there is a large mansion house, formerly known as Selsdon Park Hotel, located just outside of the centres boundary that is locally listed due to its historic importance to the area and architectural style.
- 12.18 The building has recently been refurbished by a company called Birch and is now operating as a hotel and members club.
- 12.19 Results from the household survey identified the top likes and dislikes of Selsdon, as seen below. The results found that the top reason that people like Selsdon is due to the range of supermarkets, whilst a lack of parking spaces was the top dislike of the centre.

Figure 12.19.1 Selsdon Public Opinion



## Commercial Demand

- 12.20 Retailers looking to locate to Selsdon, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Lidl	Supermarket	18,000	26,000
KFC	Fast food restaurant	1,200	2,500
Pets at Home	Pet supplies retailer	5,000	10,000

# 13. South Norwood Healthcheck

## Description

13.1 South Norwood is a vibrant place and the second largest district centre in Croydon, comprising 160 units.

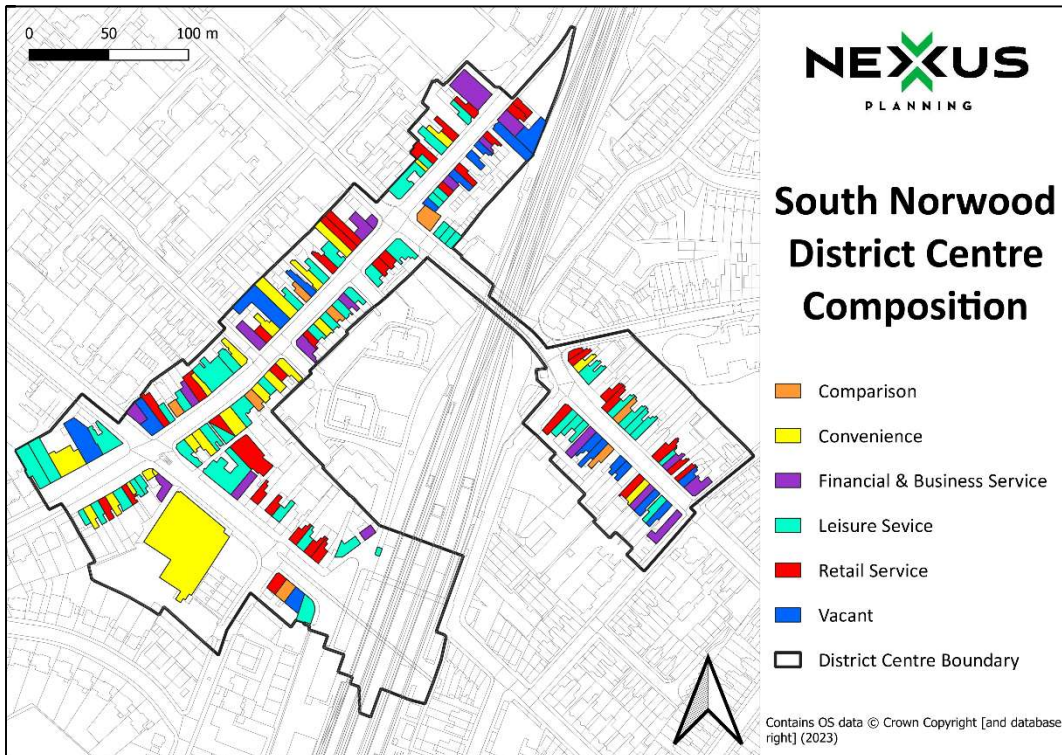
Figure 13.1.1 Photos of South Norwood



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 13.1.2 Map showing composition of retail units in South Norwood

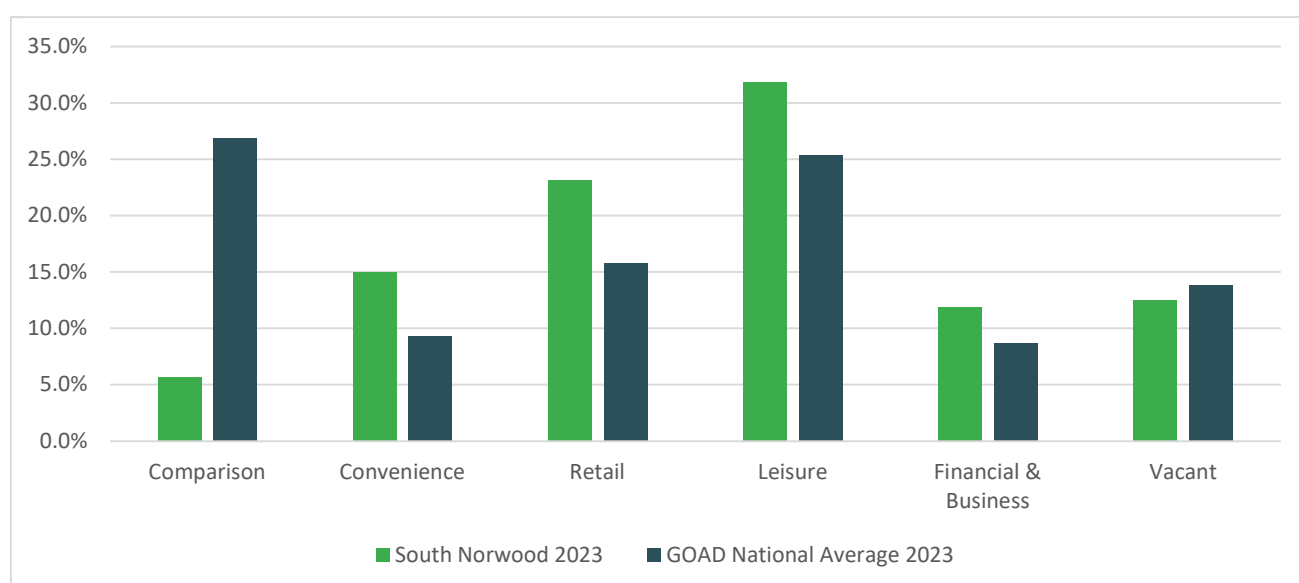


Source: Experian GOAD

Table 13.1.1 South Norwood Composition Table

	South Norwood 2023 (Total)	South Norwood 2023 (%)	National Average	South Norwood 2019 (%)	National Average 2019
<b>Comparison</b>	<b>9</b>	<b>5.6%</b>	<b>26.9%</b>	<b>7.0%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>24</b>	<b>15.0%</b>	<b>9.3%</b>	<b>11.5%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>107</b>	<b>66.9%</b>	<b>49.9%</b>	<b>63.1%</b>	<b>49.5%</b>
<i>Retail</i>	37	23.1%	15.8%	22.9%	15.2%
<i>Leisure</i>	51	31.9%	25.4%	27.4%	24.5%
<i>Financial &amp; Business</i>	19	11.9%	8.7%	12.7%	9.8%
<b>Other Retail</b>	-	-	-	<b>0.0%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>20</b>	<b>12.5%</b>	<b>13.8%</b>	<b>18.5%</b>	<b>12.0%</b>
<b>Total</b>	<b>160</b>	-	-	-	-

Figure 13.1.3 South Norwood Composition Graph



- 13.2 South Norwood has an exceptionally low number of comparison units, with this business type making up just 5.6% of the centres total composition. This is almost five times smaller than the national average of comparison units which is 26.9%. All of the other unit types have an above average presence in South Norwood. Convenience units make up 15.0% of the centre, a total that is well above the national average. Retail, leisure and financial and business services are all well represented in South Norwood.
- 13.3 In the centre, there is positively a below average vacancy rate with 12.5% of units being vacant at the time the health checks were conducted, in comparison to the national average of 13.8%.

- 13.4 Since 2019, there has been change to the overall composition of South Norwood. Vacancy rates have positively improved despite national retail trends and higher national vacancy rates. There has been a fall in the number of comparison and financial & business units, whilst there has been a rise in convenience, retail service and leisure service units.

### Transport & Accessibility

- 13.5 Norwood Junction train station is located just outside of the centres boundary, making it a highly connected centre by the rail network. Norwood Junction train station is served by both overground and rail services. The overground network has trains to Highbury and Islington, and West Croydon every 15 minutes. The trains that run through Norwood Junction provide services to Bedford, via London Bridge, London Victoria, Epsom and Caterham/ Tattenham Corner. These services have a lower frequency, running on average every 30 minutes.
- 13.6 South Norwood is additionally well connected by busses, with the TfL bus routes 410, 157, 130 and 75 stopping along the High Street. These bus routes provide services to Crystal Palace, New Addington, Lewisham Station, Thornton Heath, Wallington, Croydon Metropolitan Centre and Morden.
- 13.7 A cycle lane runs along High Street, however it was observed that there were frequently cars parked in it meaning that the route was highly obstructed. Only limited cycle parking was noticed in the centre.
- 13.8 Pedestrian accessibility in South Norwood is restricted. There are limited pedestrian crossing points, despite the road having a high rate of vehicular traffic using it. Pavements are narrow and often obstructed with signage and shop displays. Given the high number of residential areas around the centre, pedestrian accessibility should be improved to create a safe and welcoming environment.
- 13.9 There are two small car parks in South Norwood which cost £1.50 per hour. They are both free on weekday evenings and on Sunday's. There is no on-street parking in South Norwood which is what has led people to park on the road and block traffic. Some on-street parking is available on the side roads that run off High Street, however as these are residential it is difficult to find a space.
- 13.10 Results from the household survey identified that the most popular way of getting to South Norwood is by walking. 47.4% of visitors indicated that they walk to the centre. Positively, in comparison to other district centres, a slightly higher percent of visitors gets to South Norwood by bus, rather than by private vehicle. 26.8% of visitors said they access the centre by bus, whilst 24.6% said they get there by car.

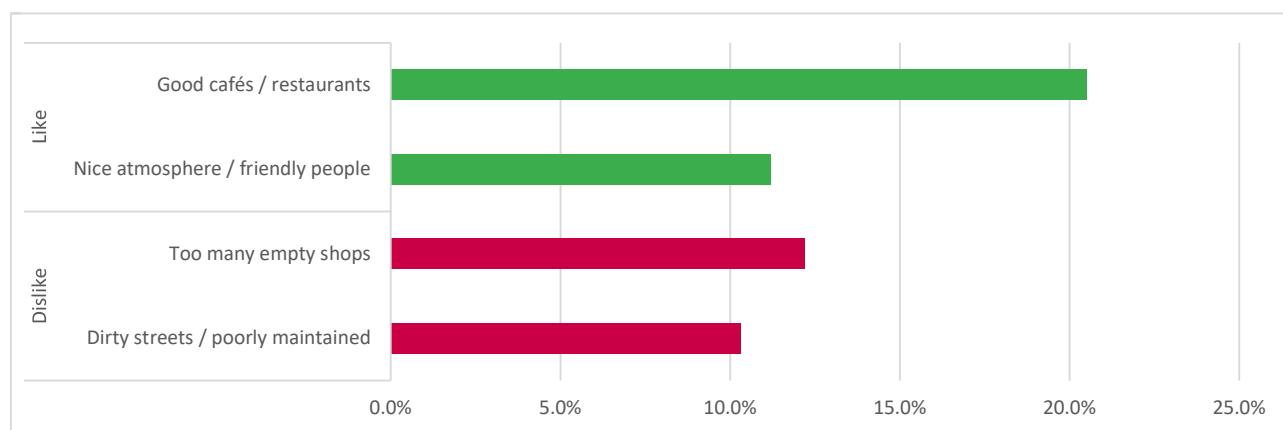
### Environmental Quality

- 13.11 The environmental quality of South Norwood would benefit from improvements. The busy High Street creates a lot of noise and pollution which is unable to be avoided due to the narrow nature of the centre. There is no greenery of significance in the centre, just a couple of trees. Improving the green environment would enhance the overall environmental quality of the centre.
- 13.12 There are no public green spaces in the centre. Some litter was noticed in South Norwood, along with some graffiti.
- 13.13 South Norwood has a moderate crime rate in respect to the rest of the borough. In July 2023, 35 crimes were reported in the centre. This figure is slightly above the total number of crimes that were reported in July 2022, which was 30.
- 13.14 South Norwood is well lit, with a high number of active frontages which play a part in deterring crime. CCTV cameras were also observed in the centre.

## Assessment

- 13.15 In South Norwood, an ambitious regeneration plan is already being progressed. This includes initiatives for placemaking, the reactivation of empty commercial units as shops and workspace, improvements to key high street community assets, and business support and community network capacity building.
- 13.16 Working in partnership with Loqiva, the local company behind PlaceApp, Croydon Council are piloting a app in South Norwood called Love South Norwood. The app virtually creates a digital town hub which is a place where the community collaborates to help South Norwood thrive and grow.
- 13.17 The monthly Clock Tower Market is held around South Norwood’s Clock Tower. This market has a wide variety of stalls that sell everything from home-made clothing to cakes to pizza. Every year, this market is held at a larger scale around Christmas. There used to be a weekly farmers market held every Sunday in South Norwood. The market was set up in 2021, however due to limited footfall it was unable to return in 2022. This was likely impacted due to Covid, as the outcome of this market would likely be different today.
- 13.18 In South Norwood, there are a number of Grade II listed buildings. These include the Clock Tower, Kennedys Sausages and war memorial at the Church of the Holy Innocents. The Church of the Holy Innocents is Grade II\* listed.
- 13.19 The built form in South Norwood is attractive, however it would benefit from shop front improvements to enhance the upper floors.
- 13.20 Results from the household survey identified the top likes and dislikes of South Norwood, as seen below. The results found that the main reason people like South Norwood is the centres good range of cafes and restaurants, whilst the top dislikes of the centre was too many empty shops and the centre is dirty and poorly maintained.

Figure 13.20.1 South Norwood Public Opinion



## Commercial Demand

- 13.21 Retailers looking to locate to South Norwood, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Savers	Discount health & beauty retailer	2,000	3,500

# 14. Thornton Heath Healthcheck

## Description

14.1 Thornton Heath is a medium sized district centre with a predominantly local offering, located just north of Croydon Metropolitan Centre, it has in total 181 units.

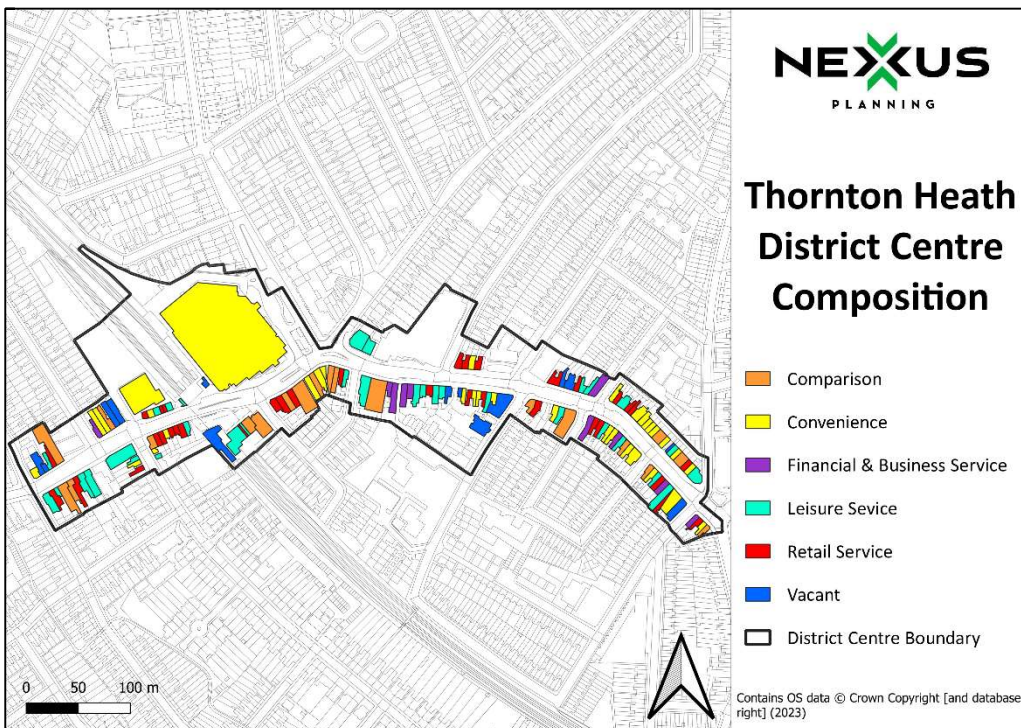
Figure 14.1.1 Photos of Thornton Heath



Source: Nexus Site Visit (September 2023)

## GOAD Composition and Vacancies

Figure 14.1.2 Map showing composition of retail units in Thornton Heath

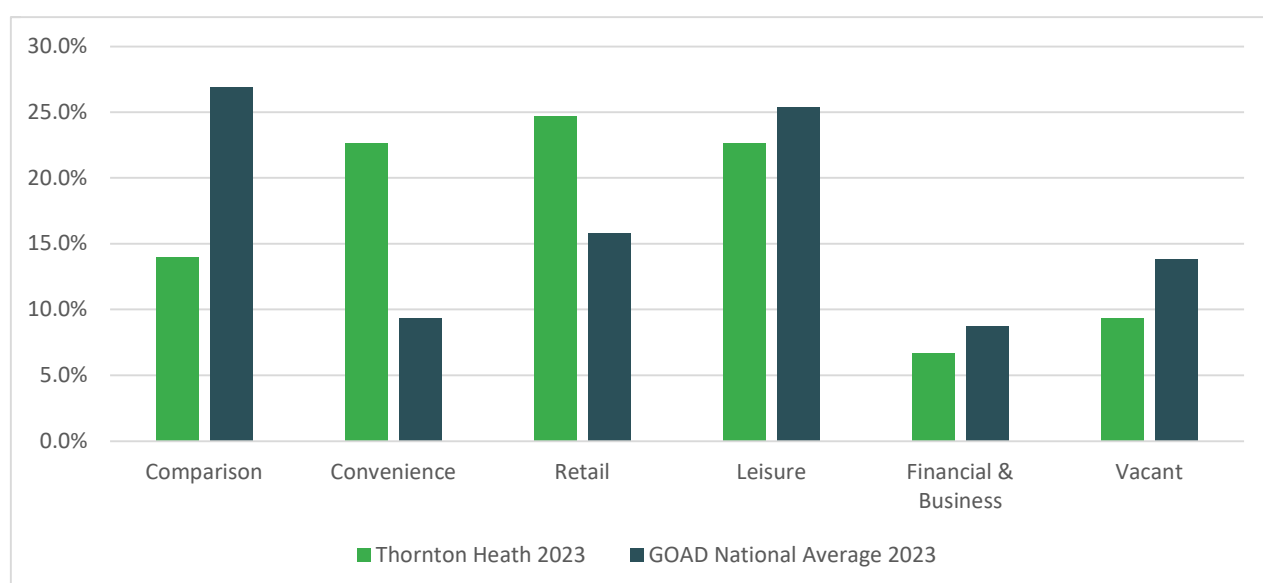


Source: Experian GOAD

Table 14.1.1 Thornton Heath Composition Table

	Thornton Heath 2023 (Total)	Thornton Heath 2023 (%)	National Average	Thornton Heath 2019 (%)	National Average 2019
<b>Comparison</b>	<b>21</b>	<b>14.0%</b>	<b>26.9%</b>	<b>17.4%</b>	<b>29.1%</b>
<b>Convenience</b>	<b>34</b>	<b>22.7%</b>	<b>9.3%</b>	<b>20.8%</b>	<b>9.3%</b>
<b>Services (total)</b>	<b>81</b>	<b>54.0%</b>	<b>49.9%</b>	<b>50.0%</b>	<b>49.5%</b>
<i>Retail</i>	37	24.7%	15.8%	21.5%	15.2%
<i>Leisure</i>	34	22.7%	25.4%	20.1%	24.5%
<i>Financial &amp; Business</i>	10	6.7%	8.7%	8.3%	9.8%
<b>Other Retail</b>	-	-	-	<b>2.1%</b>	<b>0.1%</b>
<b>Vacant</b>	<b>14</b>	<b>9.3%</b>	<b>13.8%</b>	<b>9.7%</b>	<b>12.0%</b>
<b>Total</b>	<b>150</b>	-	-	-	-

Figure 14.1.3 Thornton Heath Composition Graph



- 14.2 Like with a majority of the other district centres in Croydon, Thornton Heath has a low number of comparison units in respect to national averages. Comparison units occupy just 14.0% of Thornton Heath, a figure that is well below the national average of 26.9%. Convenience, retail and leisure services are all well represented in Thornton Heath, with totals exceeding national averages. However, there is a below average offer of financial and business services, with this unit type making up just 6.7% of the centres total composition, as well as leisure services.
- 14.3 Positively, Thornton Heath has a below average vacancy rate, suggesting that the centre is well used by local residents.
- 14.4 Since 2019, there has been change to the overall composition of Thornton Heath. Vacancy rates have improved despite national retail trends and higher national vacancy rates. There has been a fall in the number of comparison and financial & business units, whilst there has been a rise in convenience, retail service and leisure service units.



## Transport & Accessibility

- 14.5 Thornton Heath train station is located in the district centre. The station has half hourly services to London Victoria and London Bridge, as well as East Croydon, Epsom Downs and Watford Junction.
- 14.6 There is also a high frequency of busses that run through Thornton Heath, namely the TFL operated routes of 50, 198, 250, 450 and 663 which provide services to Stockwell, Spring Park, Brixton, Bell Green, West Croydon, Croydon and New Addington.
- 14.7 Around Thornton Heath, there are wide and even pavements that positively facilitate pedestrian movement. There are also frequent crossing points which are essential given then high amount of vehicular traffic that uses Brigstock Road.
- 14.8 There are no cycle lanes in Thornton Heath, and only a small number of cycle racks were noticed.
- 14.9 There is one public car park in Thornton Heath that has 30 spaces at a cost of £1.50 per hour. It is free on weekday evenings and on Sundays. There is also customer parking at Iceland, however it is restricted for just customer use. Some on-street parking is available along high street and it is free for one hour.
- 14.10 Positively, results from the household survey found that the most popular way for getting to Thornton Heath is by walking, in which 39.6% of visitors indicated they do so. Slightly below this, the second most popular way for getting to Thornton Heath is by private vehicle, with 36.6% of visitors indicating they do so.

## Environmental Quality

- 14.11 In Thornton Heath there are no public green spaces, and there is limited greenery throughout the centre. However, the wide pavements provide an excellent canvas for improvements to the green environment in the centre such as the introduction of street planters and street furniture.
- 14.12 Some graffiti was noticed in the centre, however some large murals on the side of buildings have been commissioned which enhance the overall environment and helps deter graffiti. Additionally, painting some of the buildings along the northern side of High Street in pastel colours has further enhanced the environmental quality.
- 14.13 On the most part, Thornton Heath was observed to be clean, with only a few instances of litter being noticed.
- 14.14 Thornton Heath has one of the higher crime rates of Croydon's District Centres. In July 2023, 51 crimes were reported in the centre, whilst 52 crimes were reported In July 2022, suggesting a steady crime rate in the area.
- 14.15 Despite this, Thornton Heath was observed to have a good amount of street lighting and public and private CCTV cameras installed. This observation was made in the daytime, so it is likely the scenario changes in the evenings.

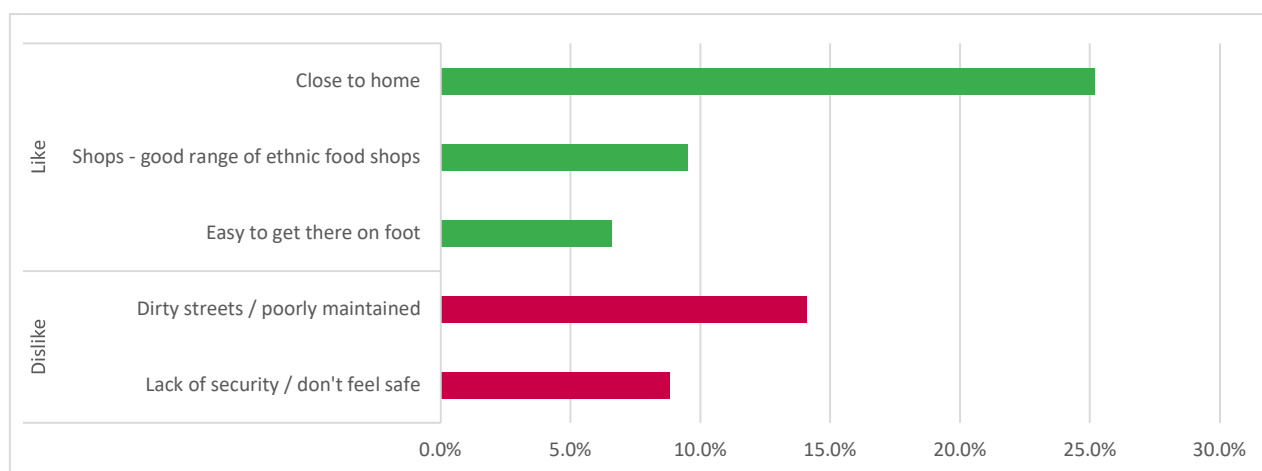
## Assessment

- 14.16 Working in partnership with Loqiva, the local company behind PlaceApp, Croydon Council are piloting a app in Thornton Heath called We Are Thornton Heath. The app virtually creates a digital town hub which is a place where the community collaborates to help Thornton Heath thrive and grow.
- 14.17 Funding was secured in 2019 to deliver public realm improvements in Thornton Heath. The first programmed works involved improvements to the public realm outside the library on Brigstock Road, along with façade improvements to buildings in the centre, public art installations, business support to local businesses and wayfinding signage fitted to

highlight key destinations around the area. In September 2023, the next phase of works began, which involved works to the roundabout on Whitehorse Lane, including the removal of old street furniture and new paving and kerbs.

- 14.18 Thornton Heath also has an ambitious regeneration plan that is currently being progressed, which includes the redevelopment of key high street sites to provide housing and mixed-use development and the installation of an urban green area on Ambassador House Forecourt.
- 14.19 There are no listed buildings within Thornton Heath. Just south of the centre’s boundary is the Grade II listed Church of St Alban and War Memorial located outside of the Church of St Alban. The built form in Thornton Heath is attractive, particularly so in the areas where façade improvements have occurred. Further shop front design improvements would enhance the overall environmental quality of the centre.
- 14.20 Thornton Heath currently has no street markets, however it is a centre with a level of vibrancy and community spirit where it is likely that a market would do well. There is however a yearly Thornton Heath Festival that is held towards the end of summer. The festival showcases a range of local talent that celebrates the culturally diverse local community.
- 14.21 Results from the household survey identified the top likes and dislikes of Thornton Heath, as seen below. The results identified that the top reason people like Thornton Heath is due to it being close to where people live, whilst the top reasons people dislike Thornton Heath is because of dirty streets/the centre being poorly maintained, and a perceived lack of security safety in the centre.

Figure 14.21.1 Thornton Heath Public Opinion



## Commercial Demand

- 14.22 Retailers looking to locate to Thornton Heath, according to the Requirements List, are detailed below.

Occupier	Description	Size (min sq. ft)	Size (max sq. ft)
Well Kneaded	Sourdough pizzeria	1,000	-

# 15. Market Share and Capacity Assessment

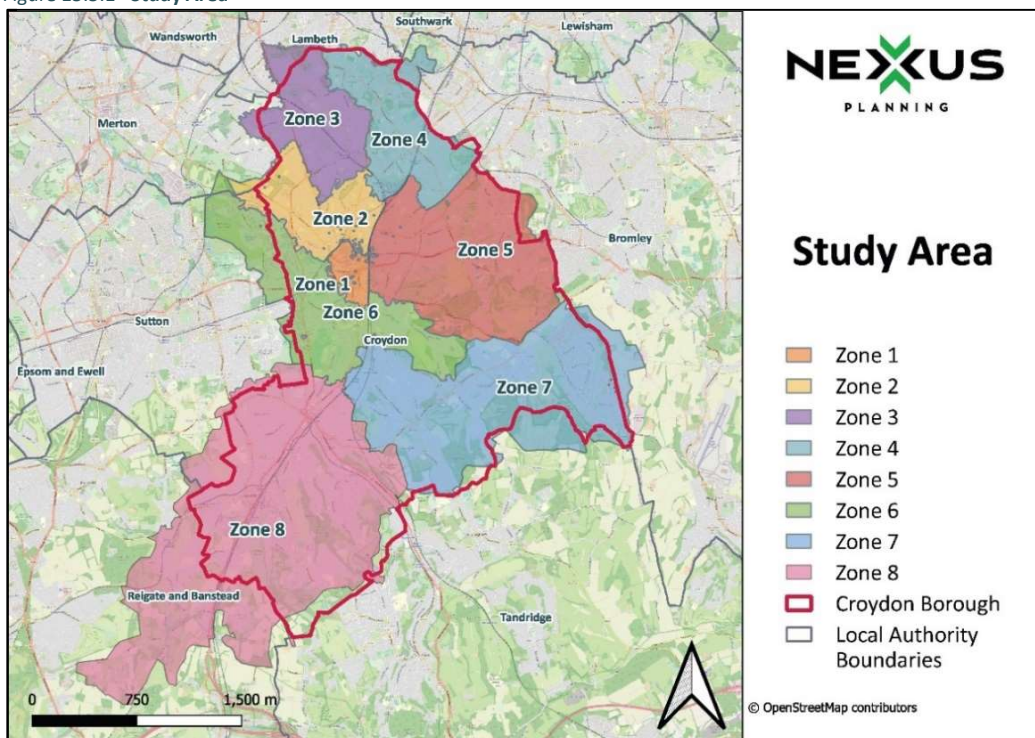
## Introduction

- 15.1 This section defines the Study Area and describes the Household Survey undertaken to inform this study. It summarises the key findings on internet shopping patterns and delves into the survey-derived market share analysis for convenience and comparison goods spending at ‘bricks and mortar’ locations.
- 15.2 We also set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) floorspace in Croydon Borough, covering the period from 2023 to 2040. This section also considers the future capacity for leisure floorspace over the same timeframe.

## Households Telephone Survey & Study Area

- 15.3 Household Surveys are recognised across the retail industry and within planning policy guidance as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. We therefore commissioned a Household Telephone Survey from NEMS Market Research to inform our quantitative analysis of the market share and turnover of specific retailers and destinations, as well as qualitative views on attitudes and perceptions to the different centres within the Borough.
- 15.4 It is important to identify a Study Area that covers the key area of interest. It is usually the area within which you would expect the resident population of the Borough to carry out the majority of its retail spending.
- 15.5 This Study Area is shown on the plan below, and at **Appendix C**. The Study Area agreed in consultation with the council, is defined by postal sector geography in order to allow analysis by sub-areas (or ‘Zones’) and to allow NEMS to obtain accurate samples.

Figure 15.5.1 Study Area



15.6 The Study Area is broadly aligned to the Borough boundary and comprises 8 Zones. A total of 800 household survey interviews took place between 13<sup>th</sup> September and 3<sup>rd</sup> October 2023. These interviews were corroborated for its statistical accuracy, relative to population, by NEMS in their report in **Appendix D**. The Figure below sets out the postcode sectors which comprise each Zone.

15.7 A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in **Appendix D**. NEMS quote their work as being within a 95% confidence range.

Figure 15.7.1 Study Area Zones and Associated Postal Sectors

Zone	Postal Sectors
1	CRO 1, CR9 1, CR9 3
2	CRO 2, CRO 3, CR7 6
3	CR7 7, CR7 8, SE16 3, SE16 4
4	SE19 2, SE19 3, SE25 4, SE25 5, SE25 6
5	CRO 5, CRO 6, CRO 7, CRO 8
6	CR2 6, CR2 7, CR9 4
7	CRO 0, CRO 9, CR2 0, CR2 8, CR2 0, CR9 5, CR9 6
8	CR5 1, CR5 2, CR5 3, CR8 5, CR8 1, CR8 2, CR8 3, CR8 4

## Study Area Population

15.8 The population for each zone in 2023 is sourced from Experian AppLibrary (2023 report), our census-based software. Pro-rata projections from 2023 to 2040 are derived from Greater London Authority data as presented by London Population Projections Explorer (September 2023). We present the population projections on a Zone-by-Zone basis below.

15.9 Please note that the full set of Statical Tables is produced at **Appendix E**.

Figure 15.9.1 Population Projections

Zone	2023	2026	2034	2040	Growth 2023 2040
Zone 1	13,525	13,857	14,226	14,469	7.0%
Zone 2	54,483	55,822	57,309	58,286	7.0%
Zone 3	59,948	61,422	63,057	64,132	7.0%
Zone 4	56,667	58,060	59,606	60,622	7.0%
Zone 5	63,317	64,873	66,601	67,737	7.0%
Zone 6	40,346	41,338	42,438	43,162	7.0%
Zone 7	58,585	60,025	61,623	62,674	7.0%
Zone 8	66,627	68,265	70,083	71,278	7.0%
<b>Total Study Area</b>	<b>413,498</b>	<b>423,663</b>	<b>434,943</b>	<b>442,361</b>	<b>7.0%</b>

Source: Table 1a, Appendix E

## Non-Store Retailing or Special Forms of Trading

15.10 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

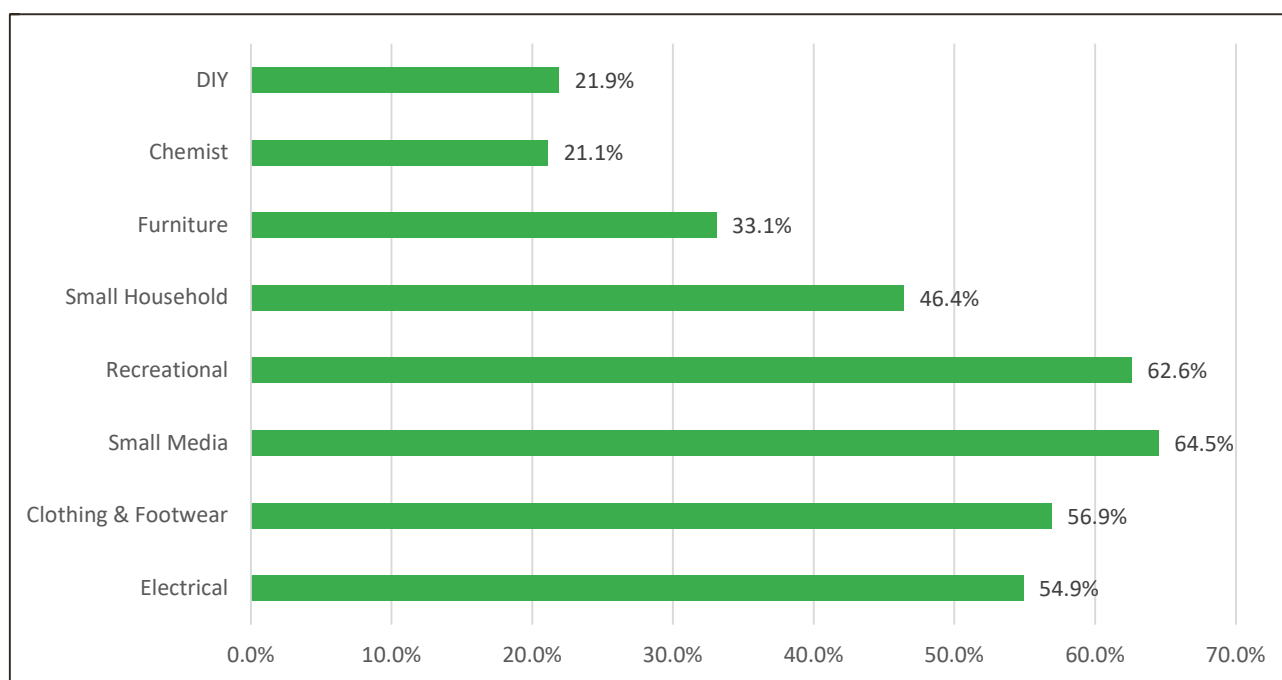
### Convenience Goods Online Shopping

- 15.11 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 15.12 Across the Study Area, 14.6% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out in Section 2, the UK average for online convenience shopping in 2023 is 18.6%. As such, the take-up of online convenience shopping in the Study Area is slightly lower than the UK average.

### Comparison Goods Online Shopping

- 15.13 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in the figure below which shows that the take-up for online shopping varies across the categories, from 21.1% (Chemist goods) to 64.5% (Small media goods). On average, within the Study Area, 46.7% of respondents shop online for comparison goods, which is considerably higher than the UK average of 35.4% (Figure 5, ERPBN 20, February 2023). This is likely to be a product of the younger age profile of Croydon when compared to the UK, resulting in a more widespread use of mobile devices as well as the greater availability of home delivery services when compared to some areas of the UK.

Figure 15.13.1 Online Comparison Goods Spending in the Study Area



Source: NEMS Households Survey

### Retail Expenditure Forecasts

- 15.14 Having examined where online spending is focused, we now examine that proportion of spending which is carried out at 'bricks and mortar' stores.
- 15.15 Retail expenditure data has been sourced from our in-house Experian AppLibrary software. We obtain separate data for convenience and comparison goods, which in turn are broken down into multiple goods categories, as set out in our full statistical assessment in Appendix C.

15.16 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.

15.17 Expenditure data from Experian is provided per capita in 2021 prices, as is every subsequent monetary value. Using the growth rates presented in Figure 7 of Experian Retail Planner Briefing Note 20 (February 2023), which are reproduced below, the per capita expenditure is then projected forward to the base year (2023) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT). As per the earlier discussion in the trends section, convenience goods spending is forecast to decline over the period to 2028 as Covid-19 related boosts to spending fall away, and as a result of a greater emphasis on discount food shopping in relation to rising inflation. Comparison goods spending is set to grow steadily over time as the economy recovers to pre-pandemic levels.

15.18 There are two elements that should be noted here:

- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs (e.g. growth rates and base per capita spending figures) to this report be re-visited on a regular basis.
- As we have mentioned previously, Experian Retail Planner Briefing Note 20 (February 2023) provides estimated year-on-year forecasts of internet and other SFT (see figure below), which allows us to ‘strip out’ any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales, but source the goods from their own stores’ shelves. This is often the case for food stores where employees will pick online orders from stores’ shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides ‘adjusted’ figures to account for this.

Figure 15.18.1 ‘Adjusted’ Special Forms of Trading Market Share Forecasts

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-2.3	6.0
2022	-6.8	2.0
2023	-2.2	-1.0
2024	-0.7	-0.8
2025	-0.3	0.3
2026	-0.2	1.6
2027	-0.1	2.2
2028	-0.1	2.4
2029	0.0	2.5
2030	0.0	2.6
2031	0.0	2.6
2032	0.0	2.7
2033	0.1	2.7
2034	0.1	2.7

Year	Convenience growth rates (%)	Comparison growth rates (%)
2035	0.1	2.8
2036	0.1	2.8
2037	0.1	2.8
2038	0.1	2.8
2039	0.1	2.8
2040	0.1	2.8

Source: Figure 7, Experian Retail Planner Briefing Note 20, February 2023

- 15.19 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. The figure below sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years. As per the muted convenience goods forecasts, convenience spending is forecast to increase by 6.3% over the Plan period, largely as a result of population growth. Comparison goods growth will accelerate at a faster rate of up to 56.1% by 2040 as a result of both population and expenditure growth.

Figure 15.19.1 Retail Expenditure Forecasts in the Study Area (£m)

	2023	2029	2034	2040	Growth 2023 2040
Convenience	£987.9	£998.1	£1,026.7	£1,050.5	6.3%
Comparison	£1,470.2	£1,633.5	£1,912.2	£2,295.3	56.1%

Source: Tables 1b & 8b, Appendix E

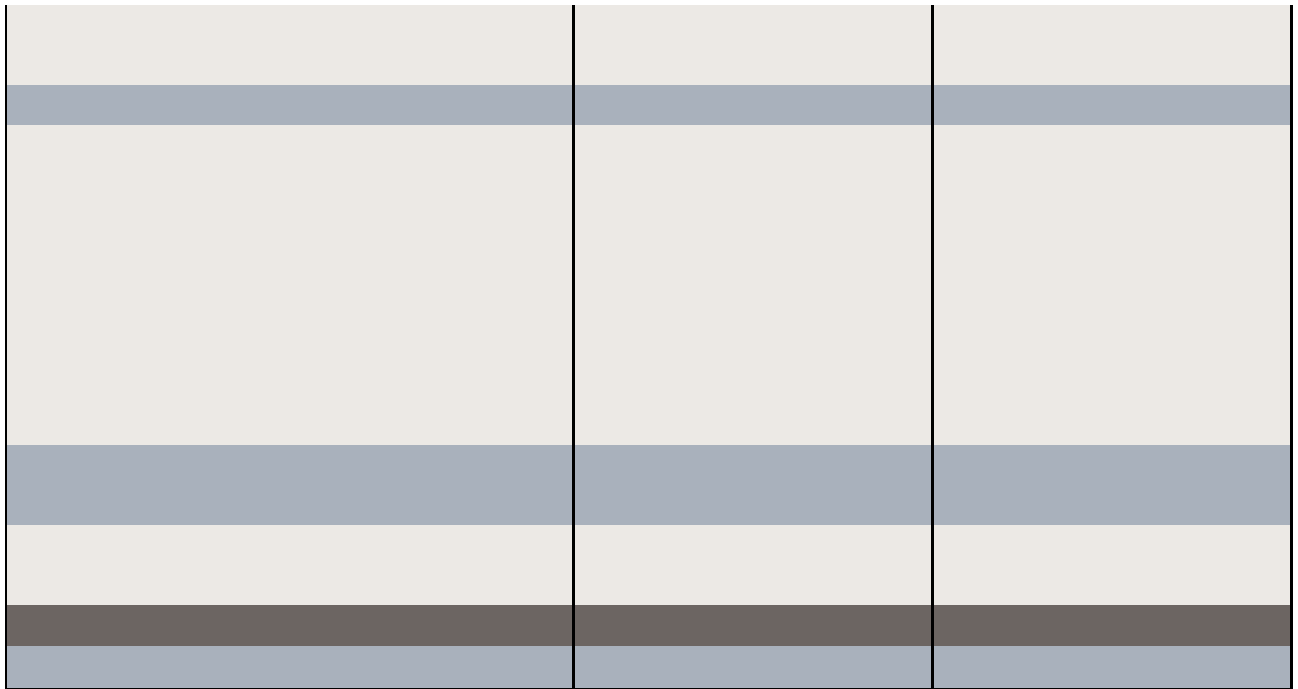
## Convenience Goods Findings

### Market Shares

- 15.20 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spend by residents across the Study Area. The Figure below specifically examines where Study Area residents are spending their money.
- 15.21 The results show that destinations in Croydon Borough account for 68.7% (£678.2m) of the spending of all Study Area residents in 2023 (£987.9m per annum). The remaining 31.3% (£309.7m) of spending carried out by residents of the Study Area takes place at destinations beyond Croydon Borough. This is a fairly typical rate of leakage amongst London Boroughs.

Figure 15.21.1 Convenience Goods Market Share by Destination

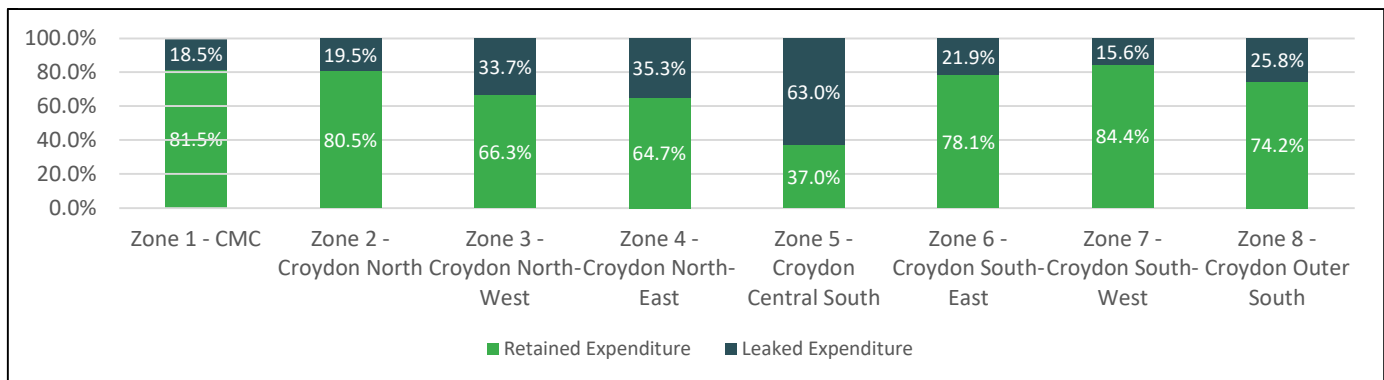
Destination	Total Market Share (%)	Total Market Share (£m)
LB Croydon	68.7%	£678.2
<b>Croydon Metropolitan Centre</b>	<b>6.0%</b>	<b>£59.0</b>
<b>District Centres</b>	<b>32.8%</b>	<b>£324.1</b>
DC - Addiscombe	1.4%	£14.0
DC - Coulsdon	5.1%	£50.0
DC - Crystal Palace	2.3%	£22.4
DC - New Addington	0.4%	£4.2
DC - Norbury	0.3%	£2.6
DC - Purley	9.7%	£95.9
DC - Selsdon	7.0%	£69.1



Source: Tables 4a and 4b, Appendix E

- 15.22 Of the spending carried out within the Borough, 65% is spent within the existing Metropolitan, District, Local and Neighbourhood Centres (£443.9m), which is positive in terms of the aim to promote ‘town centres first’ at all tiers of policy. A lower proportion of spend is directed to out of centre stores (£35% or £220.0m).
- 15.23 Of the 31.3% of spending generated by Study Area residents which leaks elsewhere (£309.7m), the main beneficiaries are destinations in Elmers End, LB Bromley (£78.1m), Beddington, LB Sutton (£43.6m) and Streatham, LB Lambeth (£39.2m).
- 15.24 The results of the household survey also outlines spending on a Zone-by-Zone basis. Looking specifically at convenience spending, we can see that the areas which retain the largest amount of convenience goods expenditure within the Borough are Zones 1, 2, 6, 7, and 8, each of which retains 74% or greater of its residents spend. Zones 3 and 4, to the north of the Borough, retain slightly less expenditure. The notable outlier though is Zone 5 (Croydon South-East), where more residents spending is directed outside the Borough than inside the Borough. This is unsurprising given Croydon South-East’s proximity to foodstore in Elmers End and West Wickham, which, cumulatively, account for more than 50% of residents spending from that area.

Figure 15.24.1 Convenience Goods Market Share by Destination



Source: Appendix C, Tables 4a and 4b



- 15.25 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading over or below expectations. This is summarised at the figure below.

Figure 15.25.1 Convenience Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
<b>Croydon Borough</b>	<b>£568.9</b>	<b>£691.8</b>	<b>+£123.0</b>	<b>+21.6%</b>
In Centre	£342.3	£467.4	+£125.2	+36.5%
Out of Centre	£226.6	£224.4	-£2.2m	-1.0%

Source: Appendix E, Table 5

- 15.26 Our findings indicate that overall convenience floorspace in the Borough is performing well, at £123.0m per annum above benchmark, or 21.6% above benchmark. This is in large part due to the performance of shops in town centre locations, where shops are on average trading at 36.5% above benchmark. Out-of-centre convenience shops are performing almost exactly at benchmark.
- 15.27 The table below sets out the best and worst-performing standalone stores. Notably, a number of discount retailers feature prominently in the best performing list, whilst traditional foodstore retailers appear to be suffering. The survey evidence therefore accords with our trends assessment set out in Section 2.

Figure 15.27.1 Best and Worst Performance Benchmarking – Convenience Goods

Destination	Benchmark Turnover (£m)	Survey Turnover (£m)	Trading Position against Benchmark (%)
<b>Best Performing</b>			
Lidl, Church Street, Croydon Metropolitan Centre	£4.6m	£28.4m	511.8%
Aldi, Addington Road, Selsdon District Centre	£10.6m	£40.7m	283.6%
Lidl, London Road, Thornton Heath Pond Local Centre	£7.1m	£23.9m	237.2%
<b>Worst Performing</b>			
Morrisons, Purley Way	£30.8m	£16.0m	-48.1%
Tesco, Brigstock Road, Thorntown Heath District Centre	£55.2m	£43.4m	-21.4%
Sainsbury's, Westow Street, Crystal Palace District Centre	£23.7m	£19.1m	-19.3%

Source: Appendix E, Table 5

## Convenience Goods Capacity

- 15.28 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2040. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Section 2, one such example has been the economic implications of the United Kingdom leaving the European Union, the Covid-19 pandemic, and the recent war in Ukraine, all of which has culminated in high inflation.

15.29 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations). Any such development would be required to be assessed in line with NPPF policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

15.30 Detailed quantitative retail capacity tables are enclosed at **Appendix E**.

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

$$\text{Available Expenditure (£m)} - \text{Turnover of existing \& proposed (£m)} = \text{Surplus or Deficit (£m)}$$

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

15.33 The turnover of existing retailers across the Study Area is calculated based on average sales densities, which is turnover per square metre. Various retail planning sources, such as GlobalData, provide average (or benchmark) sales densities for all national multiple retailers.

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

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

15.36 Turning now to our detailed findings for Croydon, as detailed above, the household survey results show that facilities within the Borough have a 68.7% convenience goods market share of all spending carried out by residents of this Study Area.

15.37 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores within the Borough will continue to draw 68.7% of all convenience goods spending from the Study Area). We consider maintaining a constant market share a sensible basis for analysis given the relative lack of large and publicly planned developments across the Borough which benefit from planning permission. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers.

15.38 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2040, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 20, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available

floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue projected efficiencies in the turnover of existing convenience retail floorspace (i.e. any space efficiency gains are forecast to be largely nullified by the discounted value of convenience goods sold per square metre).

15.39 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of **Appendix E** and can be summarised as:

- Utilising a ‘goods based’ approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus’ professional judgement based on site visits.
- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus’ professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional ‘inflow’ from outside of the Study Area. In this instance, we have assumed that centres within Croydon will draw the vast majority of their convenience goods custom from within the Study Area, with a modest assumption that 2% of additional turnover will flow from residents living outside the Study Area.

15.40 As previously discussed, we then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as ‘benchmark’ turnover. ‘Benchmark’ turnover is calculated from national average ‘sales densities’ (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

15.41 Based on the household survey, we previously identified that Croydon’s convenience retailers within the Study Area turnover an estimated £678.2m of Study Area residents spend at 2023 (Table 6a). Table 6c then sets out the benchmark turnover of existing facilities in the Borough (£568.9m at 2023). The implication of this is that, cumulatively, stores within the Study Area are trading very well, at £109.3m above company average.

15.42 We then go on to consider committed and extant permissions for new convenience retail floorspace. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the 2023 household survey. We do not take into account proposed allocations for retail floorspace but consider development proposals for which a formal planning application has either been submitted or approved. Only two commitments have been identified and accounted for in our capacity assessment; this can be seen at Table 6d. In total, these commitments equate to a net convenience floorspace of 1,978 sq m and an estimated turnover of £20.0m at 2023 (Table 6d).

15.43 Taking account of committed turnover we identified in Table 7a, residual expenditure of £69.9m in 2029 increased to £106.6m by 2040. Theoretically, this is the amount of expenditure which might be available to support new floorspace in the Borough at during the specified period.

Figure 15.43.1 Gross Convenience Goods Surplus Expenditure in LB Croydon

Year	Benchmark Turnover (£m)	Survey Turnover (including inflow) (£m)	(Gross) Available Expenditure Before Commitments (£m)	Turnover of All Committed Floorspace (£m)	(Net) Surplus Expenditure (£m)
2029	£607.7	£698.9	£91.2	£21.4	£69.9
2034	£607.7	£719.0	£111.3	£21.4	£89.9
2040	£607.7	£735.7	£128.0	£21.4	£106.6

Source: Table 7a, Appendix E

15.44 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for LB Croydon in Table 7a. This is summarised below.

Figure 15.44.1 Net quantitative 'capacity' for new convenience goods facilities in LB Croydon

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2029	£69.9	5,033	6,891
2034	£89.9	6,477	8,867
2040	£106.6	7,677	10,509

Source: Table 7a, Appendix E

15.45 Accordingly, there is expected to be initial capacity of between 5,033 and 6,891 sq m net in 2029. This capacity is expected to grow modestly over the course of the Local Plan period, where we calculate a capacity of between 7,677 and 10,509 sq m in 2041.

15.46 Importantly, the majority of this capacity is generated by stores performing well against benchmark in the centres within Croydon Borough, rather than through any significant excess of out-of-centre spending. This is highly relevant, and the implications of this result will be examined in greater detail in Section 17.

15.47 Tables 7b to 7e at **Appendix E** then set out identical capacity estimations for sub-groups within Croydon Borough. We examine splitting the overall Borough capacity shown in Figure 16.43.1 amongst Croydon Metropolitan Centre (Table 7b), All other identified centres (i.e. District Centres, Local Centres and Neighbourhood Centres – Table 7c), the Purley Way Transformation Area (Table 7d) and All other areas in the Borough (Table 7e).

15.48 These splits are based on survey-evidenced existing convenience goods market shares (e.g. that Croydon Metropolitan Centre will continue to attract a 6.0% market share and so on). However, we suggest exercising caution on these sub-groupings as we consider it highly likely that, within its own Borough boundary, the Council will want to effect change of the Plan period. A case in point is with Purley Way. Whilst that area currently only has a 12.7% convenience goods market share, the Council has demonstrable plans to designate a number of new town centres as part of the Purley Way Transformation Area Chapter in the revised Local Plan (see also section 17). A prescriptive use of the area-by-area capacities set out in Figure 16.47.1 below would confuse this process as negative capacity is identified (as a result of some under-performing stores in the area). Therefore, whilst these sub-groupings are useful, we suggest that the primary focus should be on the overall Borough capacities set out in Figure 15.43.1 so that there remains flexibility for location-specific market interventions over the Plan period.

Figure 15.48.1 Net quantitative ‘capacity’ for new convenience goods facilities in LB Croydon by sub-grouping (Sq m net) – Current Market Shares

Year	Croydon Metropolitan Centre	All Other Centres (District/ Local/ Neighbourhood)	Purley Way Transformation Area	All Other Locations	LB Croydon
2029	1,617 to 2,214	4,523 to 6,192	-544 to -744	-563 to -771	5,033 to 6,891
2034	1,743 to 2,386	5,373 to 7,356	-276 to -378	-363 to -497	6,477 to 8,867
2040	1,847 to 2,529	6,079 to 8,322	-53 to -73	-197 to -269	7,677 to 10,509

Source: Tables 7a-7e, Appendix E

## Comparison Goods Findings

### Market Shares

- 15.49** Turning to consideration of comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 8-18 of **Appendix E**.
- 15.50** To begin with, we look at the overall comparison goods spend by residents across the Study Area (Table 17a). The results show that destinations in Croydon Borough account for 71.7% (£1,053.5m) of the spending of all Study Area residents in 2023 (1,470.3m per annum). The remaining 28.3% (£416.7m) of spending carried out by residents of the Study Area is spent at destinations beyond Croydon Borough.
- 15.51** The figure below specifically examines where residents of the Study Area are carrying out their comparison goods spending. The results show that the Metropolitan, District, Local and Neighbourhood Centres attract a significant proportion of comparison spending, accounting for £491.9m of comparison spend in the Study Area, which represents only 33.5% of total expenditure. This is though a significantly reduced proportion when contrast to our convenience goods findings. Croydon Metropolitan Centre is by far the most popular destination, attracting 24.6% of total spend, with the Borough’s District Centres attracting 7.9% of market share cumulatively.
- 15.52** Out of Centre locations hold a much greater attraction for comparison goods than was shown to be the case with convenience goods, with 38.2% of total comparison spending being spent there. Almost all of this out-of-centre spend is attracted to Purley Way (37.0%), making it by far the most significant out-of-centre retail location in the Borough.
- 15.53** 28.3% of comparison spending by residents of the Study Area leaks outside of District. The largest attractors of spend are Bromley (7.0%), Central London (3.1%) and Sutton (2.1%).

Figure 15.53.1 Comparison Goods Market Share by Destination

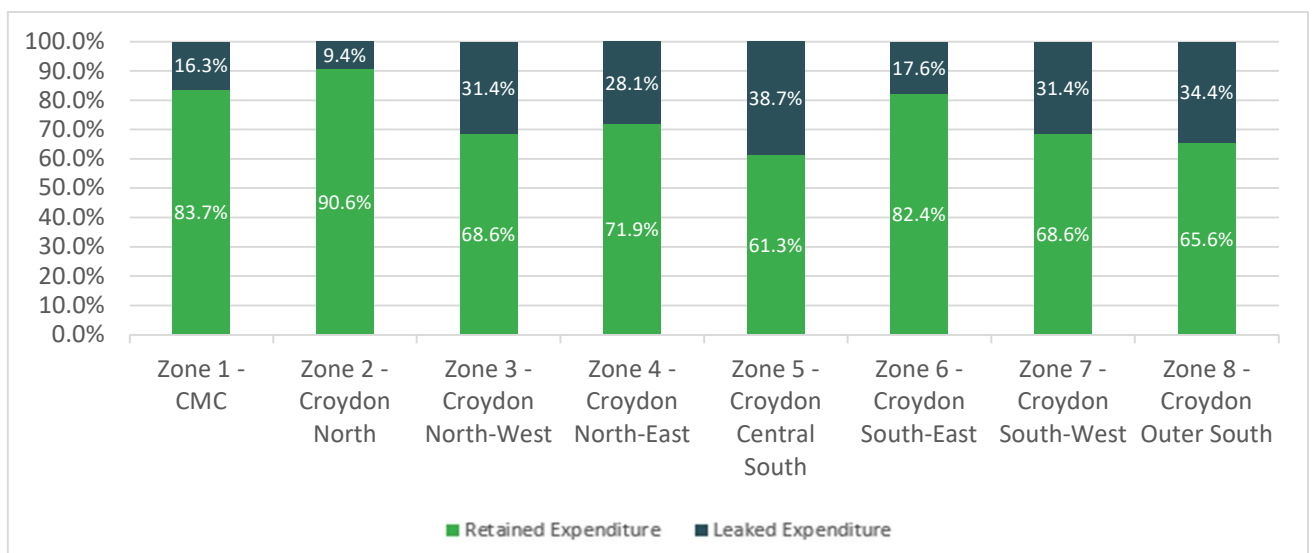
Destination	Total Market Share (%)	Total Market Share (£m)
LB Croydon	71.7%	£1,053.5
<b>Croydon Metropolitan Centre</b>	<b>24.6%</b>	<b>£362.1</b>
	<b>7.9%</b>	<b>£116.2</b>
	0.3%	£4.4
	1.6%	£24.0
DC - Crystal Palace	0.9%	£12.9
DC - New Addington	0.1%	£1.8
DC - Norbury	0.3%	£4.0
DC - Purley	3.4%	£49.4

Destination	Total Market Share (%)	Total Market Share (£m)
DC - Selsdon	0.2%	£3.3
DC - South Norwood	0.2%	£2.9
DC - Thornton Heath	0.9%	£13.5
<b>Local Centres</b>	<b>0.6%</b>	<b>£8.7</b>
LC - Brighton Road (Sanderstead Road)	0.0%	£0.3
LC - Brighton Road (Selsdon Road)	0.0%	£0.6
LC - Broad Green	0.0%	£0.7
LC - Hamsey Green	0.0%	£0.0
LC - Pollards Hill	0.0%	£0.4
LC - Sanderstead	0.3%	£5.0
LC - Shirley	0.1%	£1.2
LC - Thornton Heath Pond	0.0%	£0.5
<b>Neighbourhood Centres</b>	<b>0.3%</b>	<b>£4.9</b>
<b>Out of Centre</b>	<b>38.2%</b>	<b>£561.6</b>
Purley Way	37.0%	£544.4
Other Locations	1.2%	£17.2
<b>Outside of LBC</b>	<b>28.3%</b>	<b>£416.7</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>£1,470.3</b>

Source: Tables 17a & 17b, Appendix E

15.54 As with our previous assessment of convenience goods, we are also able to examine the degree of comparison goods spend within each Zone. Below we examine the amount of comparison goods spending carried out inside Croydon Borough (i.e. 'retention') by residents of the Borough itself, and that which is spent outside (i.e. 'leakage').

Figure 15.54.1 Comparison Goods Market Share by Destination



Source: Table 17a, Appendix E

15.55 The survey findings for comparison goods show that the retention rate of spending is highest in Zones 1, 2 and 6, which are some of the closest Zones to Croydon Metropolitan Centre and Purley Way. Retention drops in the outer Zones, as

the distance to Croydon Metropolitan Centre and Purley Way increases, and similar to convenience goods trading, Zone 5 has the highest rate of leakage. Notably though, more spending is retained than leaked in all Zones.

15.56 Looking at the most popular destinations outside of the Borough, most likely as a result of proximity, Bromley is notably a popular alternative for residents in Zones 5 and 7 to the south of the Borough.

### Comparison Goods Capacity

15.57 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).

15.58 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading ‘at equilibrium’ at 2023, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2040. For the purposes of our assessment, we have assumed that the Borough’s attraction to Study Area residents will remain constant at 71.7% of all spending proportionate to population growth (Table 18a). Based on the limited scale of planned developments inside and nearby the Borough, we consider this a robust basis for analysis.

15.59 We take account of committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the 2023 household survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace that are not likely to come forward over the plan period.

15.60 In this case, four commitments have been identified. The Figure below sets out below the resultant gross comparison goods capacity forecasts over time. The committed development includes a net 1,454 sq m of comparison goods floorspace and an estimated turnover of £7.6m at 2023. This commitment is then projected forwards and deducted from the gross surplus expenditure. As seen in the Figure below, we have identified limited initial capacity within the Borough for new floorspace. This is because Experian forecasts show that the near-term sales efficiency of existing retailers will actually grow faster than the forecast growth in spending, meaning that the limited expenditure generated by the growth in local population will largely be consumed by existing retailers, rather than being made available to support new floorspace. However, by 2034 a positive surplus expenditure of £32.7m arises, increasing further to £66.8m by 2040.

Figure 15.60.1 Gross Comparison Goods Surplus Expenditure in LB Croydon

Year	Benchmark Turnover (£m)	Survey Turnover (including inflow) (£m)	(Gross) Available Expenditure Before Commitments (£m)	Turnover of All Committed Floorspace (£m)	(Net) Surplus Expenditure (£m)
2029	£1,180.5	£1,193.9	£13.4	£8.4	£5.0
2034	£1,355.3	£1,397.6	£42.3	£9.6	£32.7
2040	£1,599.5	£1,677.6	£78.1	£11.3	£66.8

Source: Table 19a, Appendix E

15.61 Building on this assessment, we then look at floorspace capacity projections using minimum and maximum averages sales densities. The results are set out in the Figure below.

Figure 15.61.1 Net quantitative ‘capacity’ for new comparison goods facilities in LB Croydon

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2029	£5.0	835	1,313
2034	£32.7	4,719	7,415
2040	£66.8	8,155	12,815

Source: Table 19a, Appendix E

15.62 Although there is limited capacity at 2029, this increases to between 4,719 and 7,415 sq m net in 2034, and then to between 8,155 and 12,815 sq m net by 2040. The policy implications of these results will be examined in Section 6.

15.63 As with convenience goods, we have also sub-divided this figure between different areas of the Borough based on existing market shares. We would urge the same caution as previously discussed under convenience goods capacity when utilising these figures too prescriptively.

Figure 15.63.1 Net quantitative ‘capacity’ for new comparison goods facilities in LB Croydon by sub-grouping (Sq m net) – Current Market Shares

Year	Croydon Metropolitan Centre	All Other Centres (District/ Local/ Neighbourhood)	Purley Way Transformation Area	All Other Locations	LB Croydon
2029	507 to 797	-854 to -1,342	1,146 to 1,801	36 to 75	835 to 1,313
2034	1,842 to 2,894	-376 to -590	3,153 to 4,954	100 to 157	4,719 to 7,415
2040	3,023 to 4,750	48 to 75	4,928 to 7,744	156 to 245	8,155 to 12,815

Source: Tables 19a – 19e, Appendix E

## Leisure Capacity

15.64 The results of the NEMS Household Telephone Survey offer an indication of locations and facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinema, Restaurant, Pubs/Bars/Nightclubs, Ten pin bowling, Casino and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Croydon area.

15.65 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.

15.66 Nevertheless, we appraise the existing provision of leisure facilities across the Council area and compare this against recognised sector ‘standards’ or ‘benchmarks’. The completion of this ‘benchmarking exercise’ allows us to establish deficits and where gaps in the provision of existing facilities may be.

## Existing Market Shares

15.67 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 37-47) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at **Appendix D** and we extrapolate the key results here.



15.68 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 37 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results in the figure below.

Figure 15.68.1 Participation in Leisure Activities (%)

Leisure Activity	Zone 1 CMC	Zone 2 Croydon North	Zone 3 Croydon North West	Zone 4 Croydon North East	Zone 5 Croydon Central South	Zone 6 Croydon South East	Zone 7 Croydon South West	Zone 8 Croydon Outer South	Study Area Average
Indoor sports or health and fitness activity	35.2%	20.9%	19.5%	35.0%	35.7%	31.5%	27.0%	32.7%	<b>29.2%</b>
Cinema	43.7%	49.8%	51.1%	42.3%	57.0%	53.4%	45.7%	56.6%	<b>50.7%</b>
Restaurant	75.8%	71.1%	59.4%	56.2%	81.2%	73.8%	68.9%	80.8%	<b>70.6%</b>
Pub / bars / nightclubs	39.5%	30.5%	22.8%	32.4%	49.3%	37.6%	34.6%	40.9%	<b>35.8%</b>
Ten pin bowling	17.4%	22.8%	14.2%	7.5%	21.8%	17.0%	24.3%	21.1%	<b>18.5%</b>
Casino	0.0%	2.4%	2.5%	0.0%	5.7%	2.8%	2.4%	1.7%	<b>2.4%</b>
Theatres / concert halls / museums / art galleries and other cultural facilities	35.3%	27.5%	41.9%	46.1%	50.9%	52.1%	41.9%	68.5%	<b>47.0%</b>

Source: Appendix D. Question 37 of NEMS Household Survey

15.69 As evident in the figure above, participation rates vary across different activities and across different zones. The most popular leisure activity is visiting restaurants, with 70.6% regularly doing so. Conversely, the least popular activity by far is visiting a casino, which only 2.4% of respondents reported participating in.

15.70 Looking at individual geographies, it is apparent that residents of Zone 5 (Croydon Central South) are generally the most socially active, with residents in Zone 3 (Croydon North) having the lowest average participation levels.

15.71 NEMS also asked a series of questions to understand where residents usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the Council area in the figure below. Again, we only consider here the results for the Zones in the Inner Study Area.

Figure 15.71.1 Most Popular Leisure Destinations (%)

Leisure Activity	Most Popular	Second Most Popular	Third Most Popular
Indoor Health & Fitness	Waddon Leisure Centre (8.0%)	Nuffield Health, Purley Way (6.3%)	David Lloyd, Hannibal Way (5.4%)
Cinema	Vue, Purley Way (36.8%)	Vue, High Street (23.5%)	Everyman, Crystal Palace (5.3%)
Restaurant	Croydon Town Centre (18.2%)	Central London (9.7%)	Valley Retail Park, Purley Way (7.9%)

Leisure Activity	Most Popular	Second Most Popular	Third Most Popular
Pubs/Bars/Nightclubs	Croydon Town Centre (19.5%)	Central London (8.0%)	Purley District Centre (5.8%)
Ten pin bowling	Tenpin, Valley Park (86.0%)	Hollywood Bowl, Surrey Quays (2.6%)	Strike, Wandsworth (2.5%)
Casino	Maxime Club, South Kensington (29.6%)	Admiral Casino, Croydon (14.5%)	Rendezvous Casino, Brighton (14.0%)
Cultural Activities	Central London (17.7%)	Fairfield Hall, Croydon (6.6%)	Churchill Theatre, Bromley (5.4%)

Source: Appendix D. Questions 38-44 of NEMS Household Survey

15.72 The results suggest that generally, the Borough meet the key leisure needs of its residents in the most popular leisure activity pursuits. Only in the activities of casino and cultural activities, do facilities within the Borough not feature prominently, and this is not surprising given the close proximity to Central London.

### Need for Additional Leisure Facilities

15.73 Question 46 of the Household Survey found that 34.4% of respondents across the Borough did not identify any leisure facilities which they wished to see more. This suggests that residents are largely happy with the provision of facilities.

15.74 The most commonly requested leisure facilities were a swimming pool (18.2%), more children’s facilities (10.5%), additional Leisure Centres (9.4%), more restaurants (9.1%), additional gymnasiums (7.8%), more cinemas (7.8%) and an ice rink (6.1%). In broad terms, it is therefore apparent that there is some demand for more leisure-based activities in the Borough, particularly for younger people.

15.75 Despite residents being largely content with their leisure provision, this does not mean that qualitative or quantitative improvements might not be welcome in all areas of the Borough. We examine below the scale of capacity which might arise by the end of the Plan period in 2040.

### Capacity for Additional Leisure Facilities

15.76 Having identified existing market shares and examined the demand for new facilities from the Borough’s residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism and viability of actually providing for new facilities through the Plan process in particular.

15.77 The findings of the NEMS Household Survey allow us to assess market shares within the Borough for a variety of leisure sectors. As such, we have undertaken a ‘benchmarking’ exercise by referencing the estimated increases in the Borough’s population. The results of the ‘benchmarking’ exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

### Health and Fitness Capacity

15.78 The Leisure Database Company<sup>30</sup> (May 2019) identifies that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK’s population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2019, there were in the region of 7,239 health

<sup>30</sup> State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low-cost gyms, which account for over 35% of memberships in the private sector.

15.79 In 2016, business intelligence platform, Statista, reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club. Building on this, our household survey results showed that approximately 29.8% of residents in the Inner Study Area participate in health and fitness activities (Q30). Of those, the survey results suggest that 29.2% of residents currently carry out their health & fitness activities within the Council area itself (Q38). We term this the ‘Borough retention rate’ and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Council area over time.

15.80 In the figure below, we identify that the population of the Study Area is set to increase from 413,498 in 2023 to 442,361 in 2040. Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that residents of the Study Area would support up to sixteen indoor health and fitness centre over the Plan period.

Figure 15.80.1 Health & Fitness Centre Capacity

Year	Study Area Population	Regular Participants @	LB Croydon Retention Rate @	Average Membership	No. of Clubs Supported in the Council Area
		29.2%	64.7%		
2023	413,498	120,568	77,975	5,250	14.9
2029	423,663	123,532	79,892	5,250	15.2
2034	434,943	126,821	82,019	5,250	15.6
2040	442,361	128,984	83,418	5,250	15.9

Source: Nexus analysis

15.81 Comparing capacity to supply, the results to Question 38 of the household identify nineteen indoor health and fitness facilities within the Borough which receive at least a 1.0% market share. There are also a number of smaller venues. This would suggest that there is currently a ready supply of health and fitness facilities to cater to the Borough’s population.

15.82 Notwithstanding this, the results to Question 46 of the household survey shows that 18.2% of residents would like more swimming pools in the local area, and 9.4% of residents would like to see more leisure centres. There is a geographical dimension to this. Most notably, 47.5% of residents in Zone 8 (Croydon Outer South) raised the lack of a swimming pool as a concern.

### Cinema Capacity

15.83 The Borough has 6 cinemas, which Question 39 of the Household Survey showed to cumulatively account for 68.0% of all the Borough’s residents’ cinema trips.

15.84 In 2019 (before the impact of Covid-19 on the cinema industry) <sup>31</sup>, the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person. They also identified 840 cinema facilities with

<sup>31</sup> It is noted that the latest data on cinema [annual admissions](#) and [facilities](#) that is currently available is for 2022. However, given that the film production industry is still recovering from the Covid-19 pandemic it is considered that the data for 2022 is not suitable to use for future projections.

4,564 screens in the UK, equating to 937,161 cinema seats in the UK in 2019. Based on this data, the UK yearly average was 38,585 cinema trips per screen.

15.85 As shown in the figure below, we have carried out an exercise to calculate how many cinema screens Borough residents could theoretically support. In order to gauge the number of cinema screens that can be supported in the Council Area over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person) and by assuming that 68.0% of all cinema trips would take place within the Council Area. This identified capacity for 21 screens within the Plan period.

15.86 This contrasts with a supply of 10 screens at Vue, High Street, 8 screens at Vue, Purley Way, 8 screens at Odeon, Streatham, 2 screens at The David Lean Cinema and a single screen at St Johns. This total of 29 screens would therefore seem amply to meet our capacity assessment over the Plan period.

Figure 15.86.1 Cinema Screen Capacity

Year	Study Area Population	Estimated Cinema Attendance based on national attendance average of	LB Croydon Retention Rate @	Trips per Screen	Cinema Screens Supported
		2.7	68.0%		
2023	413,498	1,116,445	759,595	38,585	19.7
2029	423,663	1,143,890	778,268	38,585	20.2
2034	434,943	1,174,347	798,991	38,585	20.7
2040	442,361	1,194,375	812,617	38,585	21.1

Source: Nexus analysis

15.87 According to Question 39 of the household survey, 7.8% of residents in the Study Area would like to see more cinemas in the local area. This does not suggest that there is a particularly strong desire from residents to increase the supply of cinema screens in the Borough.

### Ten-Pin Bowling Capacity

15.88 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, research agency Mintel identified that there were 5,617 bowling lanes<sup>32</sup>, a decrease since 2011 where 5,773 bowling lanes were identified<sup>33</sup>. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK<sup>34</sup>. Taking into account the UK population at the time this latest data was produced (67.1 million<sup>35</sup>), this equates to one lane for every 18,135 persons.

15.89 There is only one bowling facility in the Council area, Tenpin at Valley Park, which has 25 lanes. The Tenpin facility attracts 86.0% of all trips made by residents of the Borough. Based on our assessment below, this is exactly in line with likely demand over the Plan period.

<sup>32</sup> Ten-pin Bowling – UK’ Mintel, May 2014

<sup>33</sup> ‘Ten-pin Bowling – UK’, Mintel, November 2011

<sup>34</sup> [www.gotenpin.co.uk/about](http://www.gotenpin.co.uk/about)

<sup>35</sup> As identified by the Office for National Statistics’ Population Estimates for the UK

Figure 15.89.1 Ten-pin Bowling Capacity

Year	Study Area Population	Population per Bowling Alley	Lanes Supported

### Restaurants, Pubs, Bars and Café Capacity

- 15.90 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the Study area, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision.
- 15.91 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2040. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 15.92 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. In 2023, this spending was projected to be £748.40 per person per annum for residents in the Study Area (2021 prices).
- 15.93 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 20 - Leisure, Figure 1a), we calculate, in the figures below, the projected total spend across the Plan period. Total spend is projected to grow from £309.5m in 2023 to £333.7m in 2040.
- 15.94 This spending is then attributed to the restaurant, café and bar facilities across the Council area. The household survey results (Q33 and Q34) showed that restaurants, cafés, bars and pubs within the Borough ‘retained’ 58.6% of their own residents’ spending.
- 15.95 Growing the ‘benchmark’ turnover of facilities from current levels on the basis of changing leisure sales densities (as outlined Figure 2 of the Retail Planner Briefing Note 20) through extensions and trading efficiencies over the Plan period, we find a total food and beverage spending surplus across the Study Area of £7.7m by 2040.

Figure 15.95.1 Restaurants, Pubs, Bars and Café Spending

Year	Study Area Population	Spend Per Capita	Total Spend	Council Area Retention Rate	Benchmark Growth	Residual Spending
				58.6%		

Source: Nexus analysis

- 15.96 Adopting an average sales density of £5,000 per sqm at 2023 (again, projected to grow in line with changing leisure sales densities) we calculate the typical restaurant, pub, bar and café floorspace that could be supported by the identified