Town Centre Vision

Stakeholder Workshop

Structure

- Welcome and Introductions

- Purpose of the Vision Process

- Structure of the Workshop

  - Thinking about the Town Centre

  - Drivers of Change

  - Strengths, Weaknesses, Opportunities, Threats

- Discussion and break out:

  - How Horsham is seen

  - Things to keep, strengthen and change

- Participant Report back

- What will be taken forward

- Next Steps

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Purpose of the Vision Process

- Identify **key drivers** and opportunities for Horsham Town Centre
- Retail, office, housing, hotel **market and viability context**
- Integrating **retail, hotel and transport** studies
- Imaginative dynamic and deliverable, composite **picture of the future**
- Address **role of development opportunities**
- Consider **other improvements** within the town centre
- Demonstrate how the town centre could look and feel
- **Proactively plan** for the future
- **Be flexible** enough to respond to opportunities
- Ensure the long-term **competiveness** of Horsham Town Centre.

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Market Context – Key Indicators

- Strong Town Centre residential - value c£355,000.
- Average retail rents comparable to Crawley, below Guildford
- Office market vacancies on 1980's stock
- Demand for 3 or 4* hotel, or more boutique offer.

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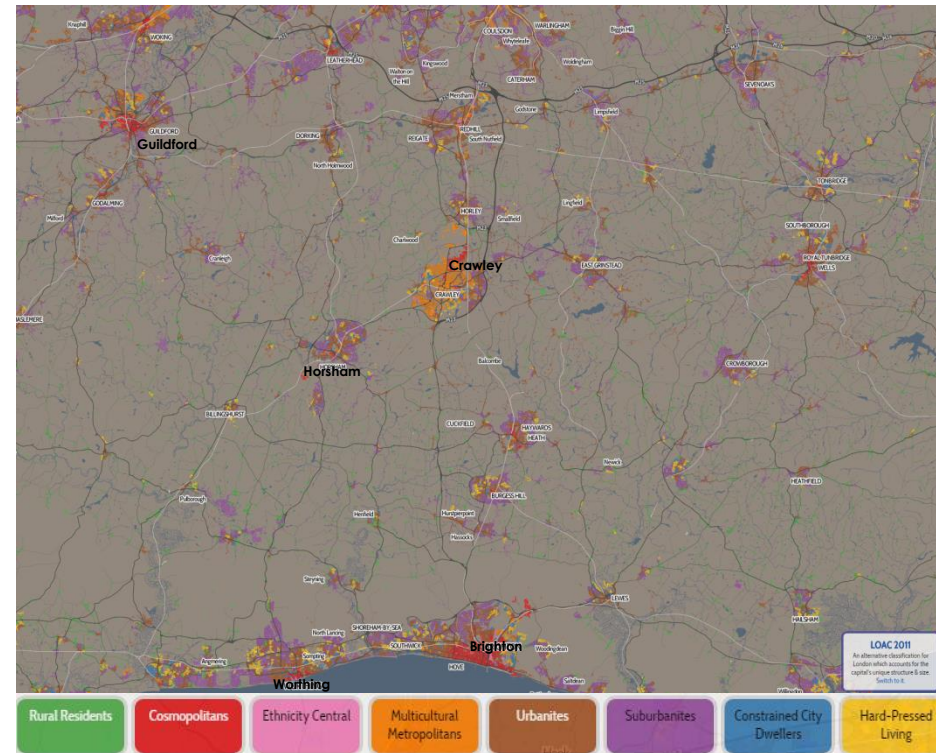
The Consumer Catchment

Suburbanites
- Homeowners
- Families with children
- The retired
- Strong education, employment level
- White ethnic group
- IT, financial, public administration, and education jobs
- Drive to work

Urbanites
- Flats, terraces, private rent
- Average ethnic mix
- IT, financial, public administration, and education jobs

Less 'cosmopolitan' than Brighton and Guildford
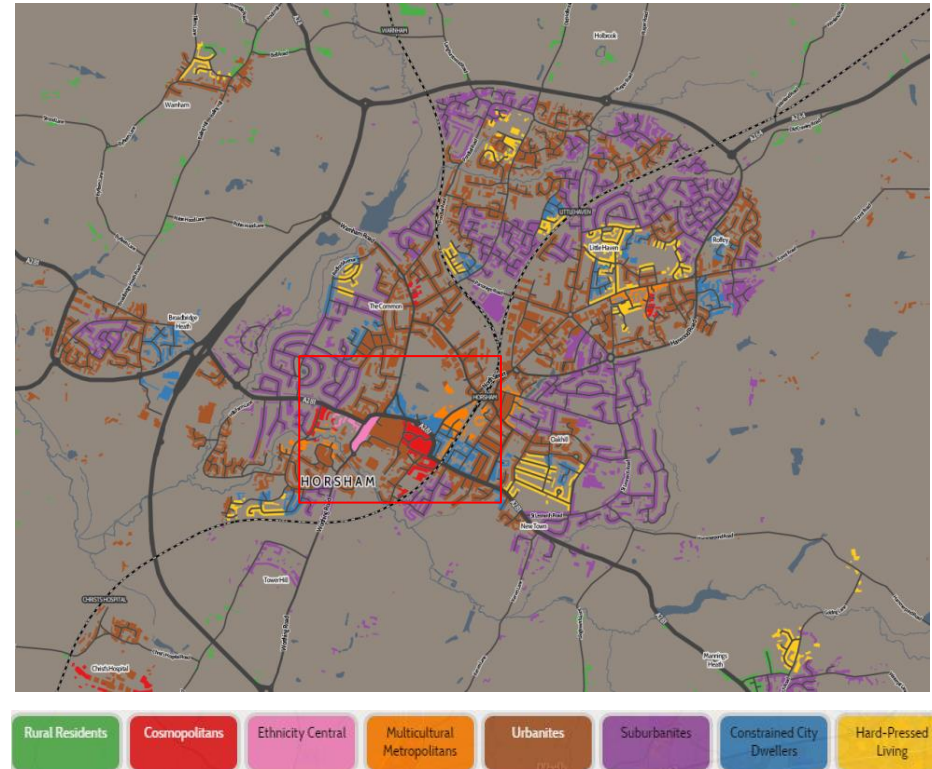Fewer young adults, singles, students

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Housing Market

New build schemes achieving £400 - £500 psf.
Key Horsham schemes:
- 2,500 units and a 500,000 sq ft business park at north by Liberty Property Trust
- 1,000 homes south of Broadbridge Heath
- 1,000 homes west of Horsham by Berkeley Homes
- 2,500 homes at Kilnwood Vale by Crest Nicholson

Town Centre office to residential conversion in progress

Private Sale Values
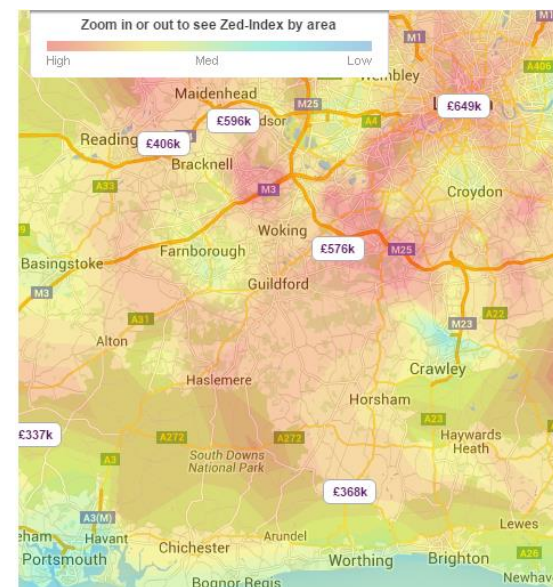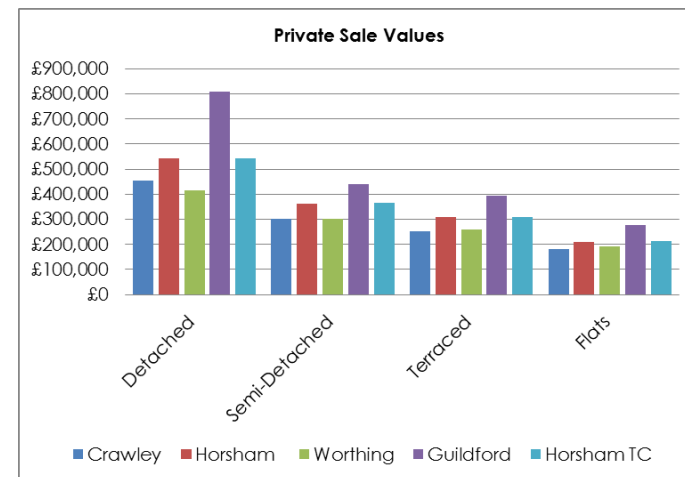
Source: Zoopla

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Housing Examples
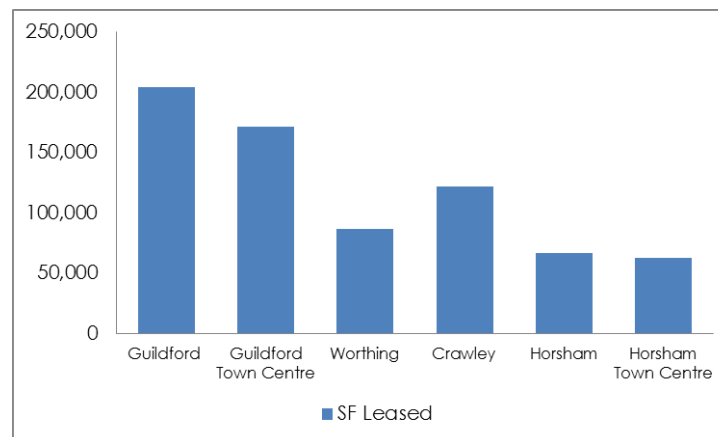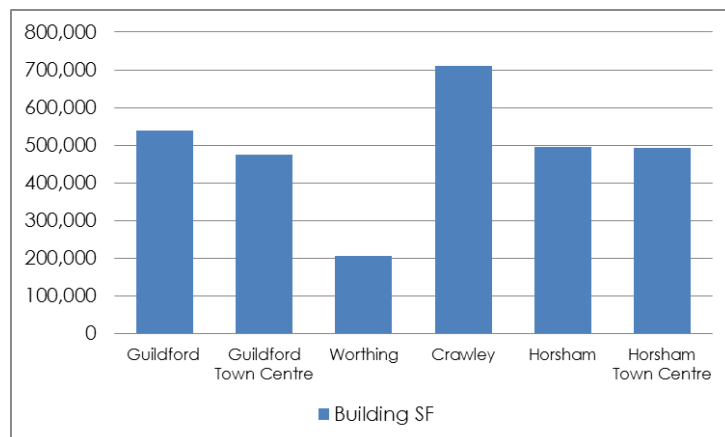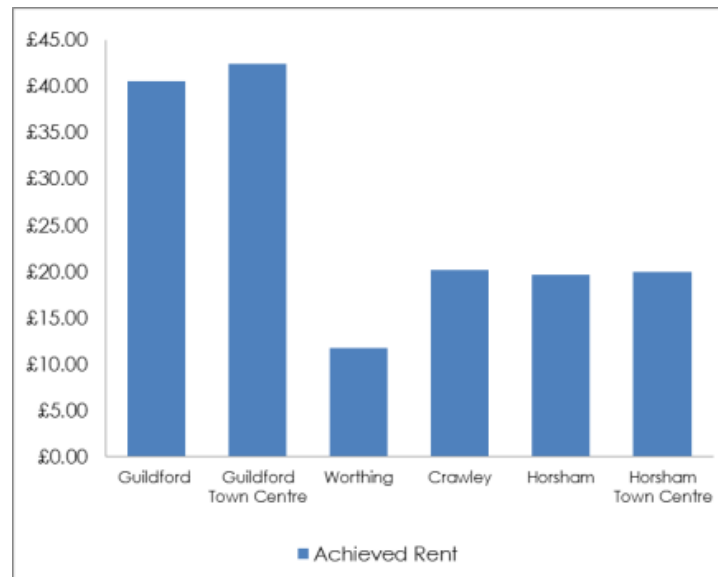
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Retail Market

- 500,000 sqft of retail floorspace in District and Centre.
- Comparable to Guildford overall
- Prime rents £85 psf for Zone A.
- Less new development and fewer new leases than Guildford
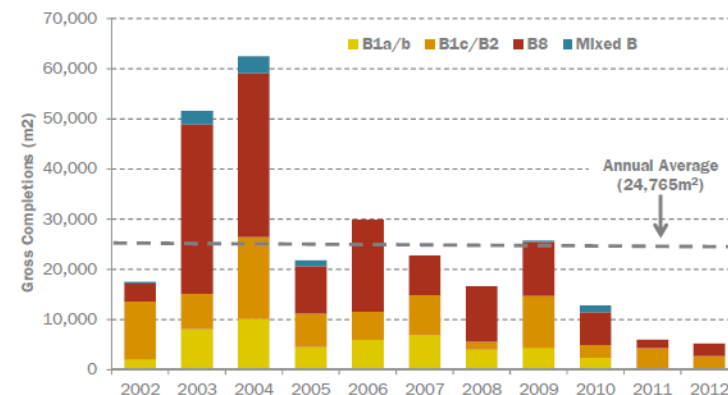
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Retail Market Examples

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Office Market

- Modest scale Town Centre market
- Modest rents
- Small number of larger employers
- SMEs and smaller floorplates
- Residential change may drive future directions

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Office Market

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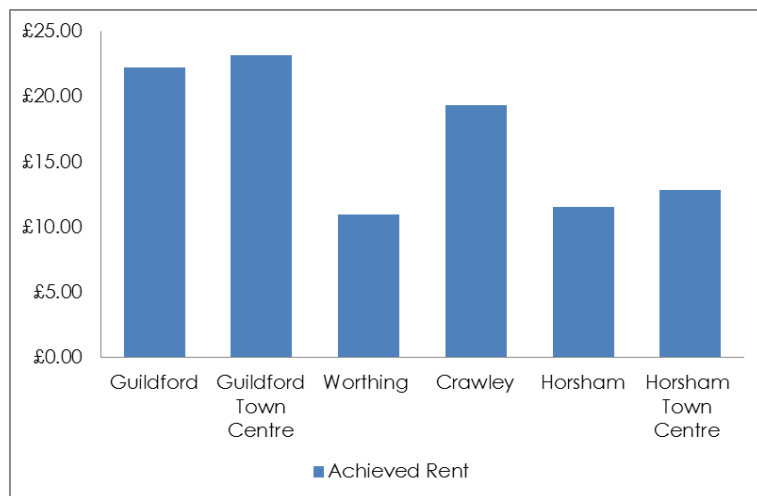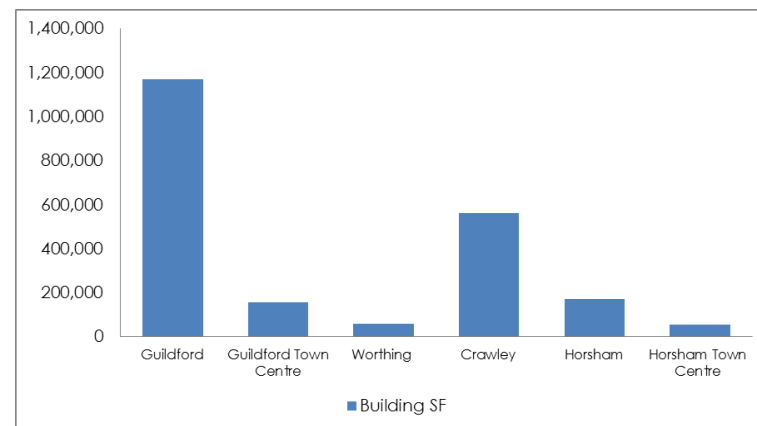
Hotel Market

- Not a major market

- Some gaps identified
- Business travel
- Gatwick related
- Potential access to countryside and coast?
- Weekend getaways?

- One or two additional 3 or 4 star
- Mid market business travel, plus a boutique hotel

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Growth Context: HDC Targets

Housing

- 800 homes per year, 16,000 homes 2011 and 2031
  - ➤ 2,500 homes Land North of Horsham
  - ➤ 600 homes Land West of Southwater
  - ➤ 150 homes Land South of Billingshurst

Retail

- 10,200 sqm net convenience goods by 2021
- 13,500 net comparison by 2020
- *Currently being updated*

Employment

- Office floorspace requirement of between 67,000sqm +

Leisure

- Potential for 1 or 2 hotels in Town Centre

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SWOT Analysis

SWOT: Strengths

Retail Base:

- Affluent catchment
- Highly ranked
- Attractive, historic town
- Strong comparison retail, mix of high end retailers and independents
- Differentiated from neighbours

Residential Catchment:

- Second most attractive market town to live – *The Times*
- Housing growth expanding catchment and spending power

Commercial Activity

- South East and London economy
- Gatwick Airport
- Small businesses
- Strong new business formation rates
- London - Brighton Creative Corridor

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SWOT: Weaknesses

Retail

- Ageing catchment
- Incomplete offer, slightly dated mix
- Smaller units
- Loss of Waitrose from Piries Place

Office

- 1980s buildings,

Housing

- Affordability

Public Realm

- Mix of paving and detailing
- Mix of quality of places - Bishopric and Queen Street
- Weaker pedestrian routes

Town Centre Management

- Blackhorse Way –co-ordinated waste management
- Gateways – from station and new John Lewis

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SWOT:Opportunities

Retail

- Larger units in Swan Walk
- Activation, events, 'pop-ups'
- New leisure, cultural offer
- Demand for 'experience based' leisure and shopping demand

Office

- High rates of homeworking
- Flexible workspace hubs
- 'Gatwick Diamond' economic cluster

Catchment

- New homes boost immediate catchment
- New communities to north and west

Tourism

- Value of Historic environment
- Cycling tourism, within reach of London and Brighton
- South Down Link nearby
- Expand branding: gateway to South Downs, and attractive base to explore countryside

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SWOT: Threats

Retail

- Regional 'Mega-centres'
- Rise of e-commerce
- Loss of key anchors

Commercial

- Decline of office in town
- Oversupply of 1980s offices
- Competition from out of town Impact on day-time footfall
- Heathrow vs Gatwick decision

Catchment
- High out-commuting
- Need to boost high skilled jobs
- Ageing population reducing productivity
- High cost of living limits disposable income

Community Infrastructure
- Lack of community hub in town centre

Image and Identity
- Historic market town appeal to young and affluent households?

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The Nature and Quality of Place
21st Century Market Town?

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Character: Shopping

Character: Public Spaces

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Character: Streets

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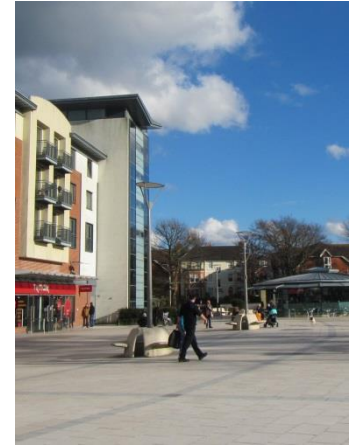# Character: Housing

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Character: Offices

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Potential Strategic Directions

Strategic Direction

Respond to Town Centre Audiences
- Anticipate changing catchment
- Support mix of uses
- Create energy and activity
- Strengthen independent retail
- Add contemporary special events, programming, arts and community participation.
- Capture a more regional visitors

Strengthening Retail and Leisure
- Balance large with fine grain
- Encourage a start-up and entrepreneurial culture
- Provide smaller spaces
- Add independent restaurants
- Bring arts and culture
- Use public realm into the evening

Adding and Diversifying Housing
- Use high quality housing design
- Use contemporary design to signal embrace of the future and advance perceptions of Horsham

Growing Employment and Economy
- Support small business activity
- Encourage start-up and entrepreneurial culture
- Provide smaller spaces
- Address obsolete stock

Raising the Hotel Offer
- In town alternative to Gatwick corporates, road-side and country B&Bs
- Contemporary in-town offer for business traveller, weekend tourist and family occasion visitors

Strategic Direction

Supporting New Community Infrastructure

- Growing role
- Leverage new service delivery models to evolve or re-provide facilities
- Activate ground floors

Enhancing Access and Movement

- Raise the quality of gateways, Soften the impact of parking
- Improve surface car parks
- Consolidate surface car parks,
- High quality car park facades
- Encourage screening with active uses

Evolving Image and Identity

- Use new investments to balance heritage identity
- Reference either historic forms *or* materials (*but not both*)
- Apply to buildings, public realm and infrastructure
- Create shared graphic identity and aesthetics in retail frontages

Curation, matchmaking, governance and support to unlock a diverse economy

Collective co-working spaces and vacant space strategy

Start-up spaces, networks & support

Community co-curation and collective re-imagining
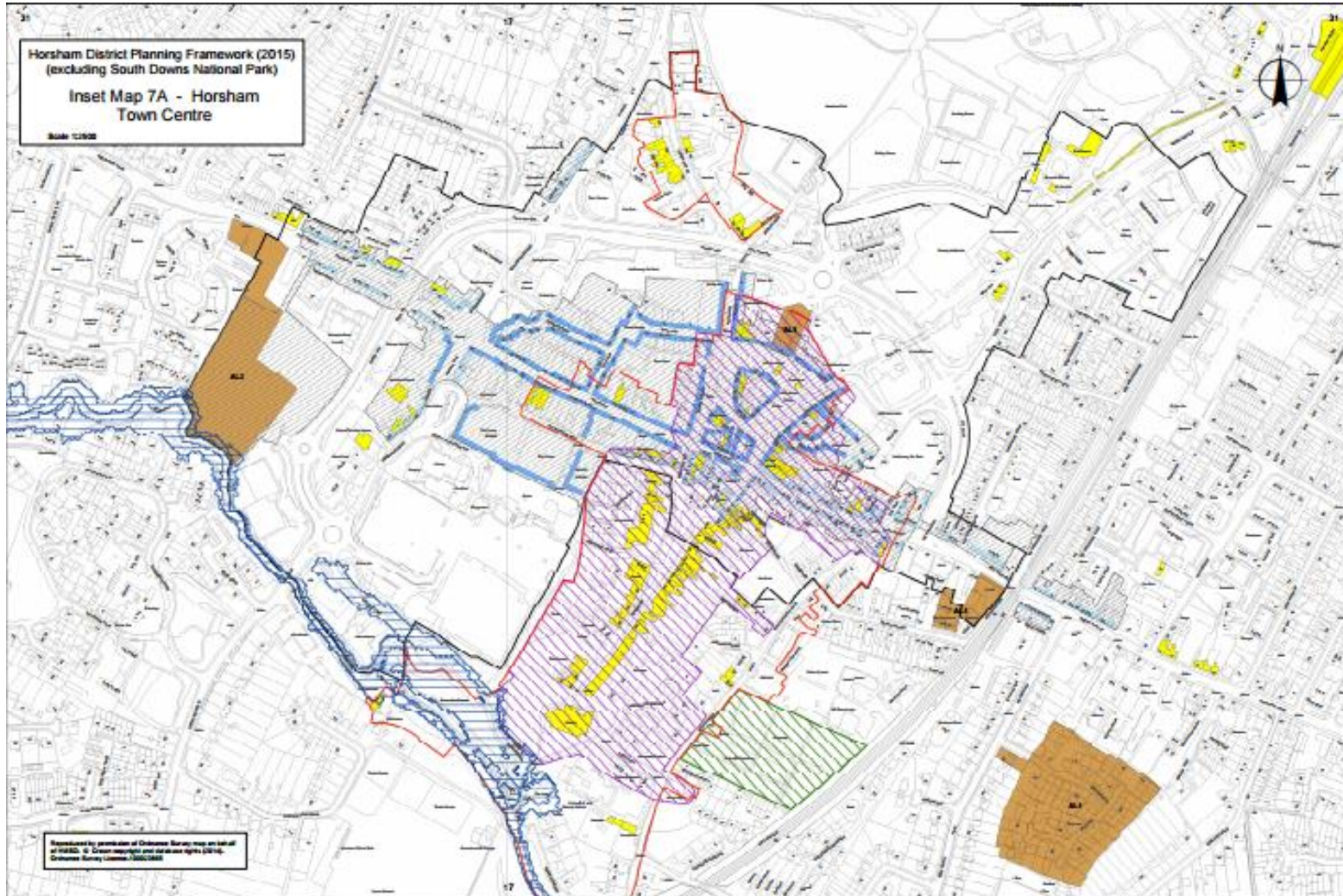
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Discussion

- How you would describe Horsham Town Centre to a first time visitor?
- How would like to tell them about its future?
- What is important to keep – specific physical components, character, role?
- What needs to be strengthened and enhanced?
- What needs to change – and why?
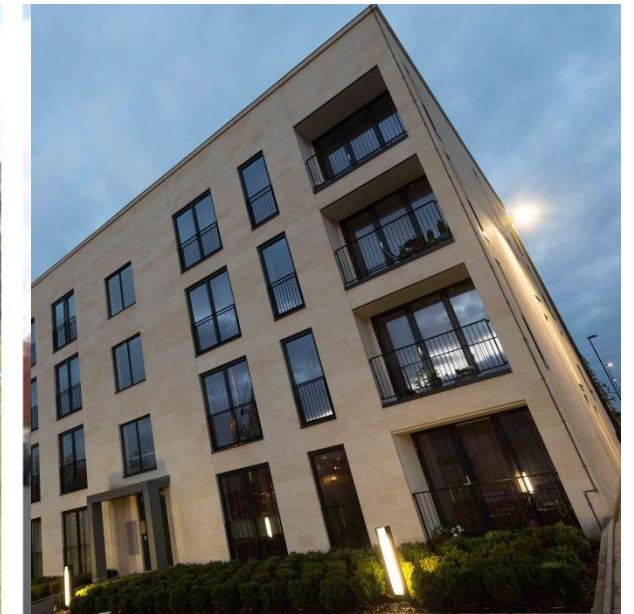- How should it change – what is the mechanism

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Discussion

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Future Character?

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Next Steps

- Consultation steps
- Timeframe
- Final outputs

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