



Manor Royal Travel Survey Analysis Summary 2025

23 December 2025

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1. INTRODUCTION AND BACKGROUND

As part of the Manor Royal “Move It” Project, Velocity Transport Planning Limited were engaged to carry out a transport survey of Manor Royal employees to understand travel patterns and to assess the appetite for people to adopt more sustainable travel behaviours.

The first survey was carried out between September and October 2024. The subsequent report produced by Velocity contained several recommendations that the Move It Project Team ranked for importance and prioritised for action. As well providing important travel behaviour insights, the results helped to inform the Move It work programme. It also identified areas of further research and where improvements were needed.

A second follow-up survey was carried out between September and October 2025 using the same question set. This allowed for comparisons and an assessment of the impact of Move It in terms of increasing the awareness of sustainable travel options among businesses and employees in support of modal shift.

This report provides a summary of results following the second survey (2025) with some comparisons to the first survey.

Further analysis has been undertaken specifically on parking, as a long-running frustration impacting Manor Royal including different forms of inconsiderate, informal and uncontrolled parking including commuter and holiday parking.

A previous report based on the 2024 survey also contained previous work undertaken by West Sussex County Council to introduce a Commercial Controlled Parking Zone (CPZ) as well as verbatim reports provided by frustrated businesses and the Manor Royal Business Rangers. This information has not been repeated here.

Several recommendations for action are included in the final section.

2. HEADLINE FINDINGS FROM THE TRAVEL SURVEY

- Most respondents (63%) drive to work alone. This is consistent with the results from 2024.
- 33% of respondents live within 5km of Manor Royal. This cohort is likely to experience fewer barriers to change.
- Hybrid working continues to influence behaviour with 51% on site 4 or more days per week while 27% come to site 3 days per week and 22% two days or fewer. This is similar to 2024.
- Peak travel times are between 8am-9am (morning peak) and 5pm-6pm (evening peak).
- There has been a modest shift in behaviour towards more sustainable modes since the previous survey.
- Reasons given for preferring to travel by car are the unavailability, inconvenience, unreliability and high cost of public transport and in contrast, the convenience, comfort and affordability of the car.
- Connections to and from local railway stations were a particular issue for employees that add unacceptable cost and time to commutes.
- While cycling is relatively low, 23% of respondents indicated that would consider cycling but with concerns about routes and safety.
- Parking was less of an issue than congestion, similar to 2024. However, further analysis shows the results are skewed by the number of respondents with access to on-site parking. See further analysis.
- A strong theme relates to traffic congestion, junction performance, and road safety, particularly during peak hours. Respondents raised concerns about long delays at key junctions, short signal phases that allow only a small number of vehicles through, and unsafe turning movements, including access to new developments.
- 51% of respondents report being familiar with easit, up from 42% in 2024.
- 42% of respondents report being familiar with Move It, up from 24% in 2024.

3. SUGGESTED WAYS TO IMPROVE TRANSPORT & TRAVEL IN MANOR ROYAL

When asked about ways to improve Manor Royal there is a high-level of consistency between 2024 and 2025. The top 5 issues are the same in 2025 as they were the previous year, with some changes in ranked importance. However, the condition of pavements and cycleways remains the number 1 ranked improvement.

Support for possible future improvements	2025		2024	
	Percent	Rank	Percent	Rank
Improve condition of pavements and cycleways	66%	1	71%	1
Dedicated crossing points to enhance pedestrian accessibility	65%	2	64%	4
Improve safety/ lighting	64%	3	65%	3
Improved wayfinding signs for pedestrians and cyclists	64%	4	58%	5
Improved road markings and signage to better control inappropriate parking	59%	5	67%	2
Live travel information links on the Manor Royal BID website	56%	6	50%	7
Dedicated on-carriageway or segregated marked cycleways	55%	7	49%	8
New starter travel information packs	55%	8	52%	6
Advance cycle stop lines at traffic signals	49%	9	47%	9
Traffic calming measures to reduce vehicle speeds	47%	10	43%	11
Additional secure/covered cycle parking	42%	11	43%	10
Estate-wide Car Park Management Plan to control inappropriate parking	40%	12	41%	12
One-way routing on minor estate roads to reduce congestion and vehicle conflicts	40%	13	35%	14
A central EV charging hub	33%	14	35%	13
Cycle confidence training	29%	15	32%	15

4. PARKING ISSUES

As per 2024, most respondents were from larger companies that provided staff with on-site parking. This is reflected in both surveys and can serve to disguise issues affecting the area, in particular smaller companies. Especially in Zone 5 (northern zone), the zone closest to the airport and within easy reach of the Fastway bus service.

Among those issues previously highlighted were lots of motor vehicle movements causing congestion around The Gatwick School during school pick up and drop off, holiday makers leaving their cars parked in Manor Royal long term, and repair centres / mechanics and dealerships leaving cars parked in spaces for long periods.

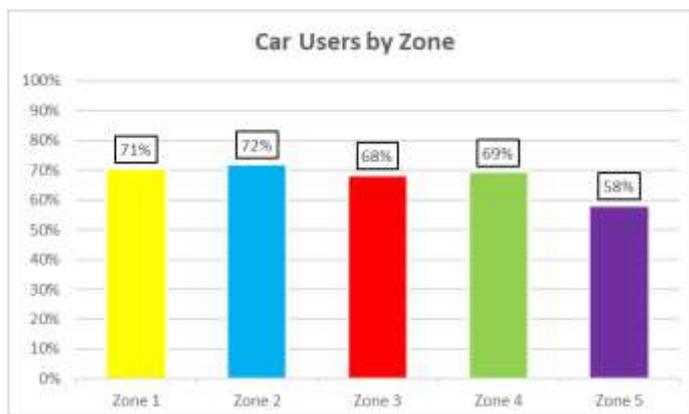
Based on this evidence, Velocity made the following recommendations:

- Review on-street parking arrangements and conduct an options appraisal for increasing effective enforcement.
- Conduct a parking audit and engage occupiers to identify any potential for car parking to be redistributed to improve utilisation.
- Engage The Gatwick School to discuss travel planning and work with them to understand, and find solutions to, the issue of congestion around school drop off and pick up, which might include the staggering of drop-off and collection (we have worked with many schools to introduce this and which can significantly help reduce the typical peak hour school demand at the beginning and end of the day).

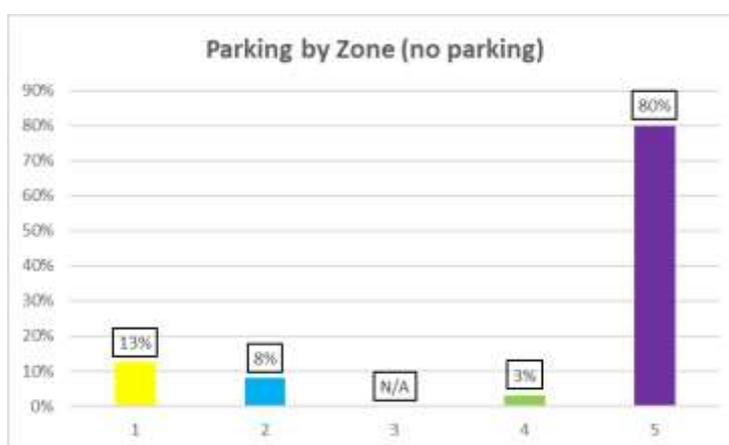
It should be noted from the 2024 survey that while most respondents were either neutral or in support of more on street parking enforcement, the majority did not support paying for this making the introduction of the previously proposed Parking Permit Scheme (CPZ) potentially contentious.

- When asked if they would support proposals to manage on-street parking in Manor Royal, e.g. via a parking permit scheme, 32% of respondents said yes, they would. The majority of respondents said they didn't know (46%) and 22% said they wouldn't support it.
- Asked if they would support proposals to pay to manage on-street parking, support dropped and a lower figure of just 13% said yes, they would be supportive of paying. A large portion of respondents were undecided with 42% saying they didn't know, but the majority said they wouldn't support it (45%).

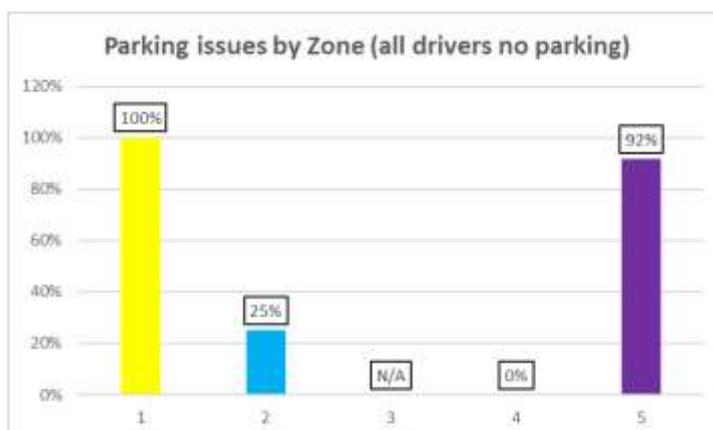
Previous analysis indicates most people drive to work alone (63% in 2025, 69% in 2024). This holds across Zones 1-4, although fewer people in Zone 5 claim to drive. This is also the area where staff are least well catered for on-site parking.



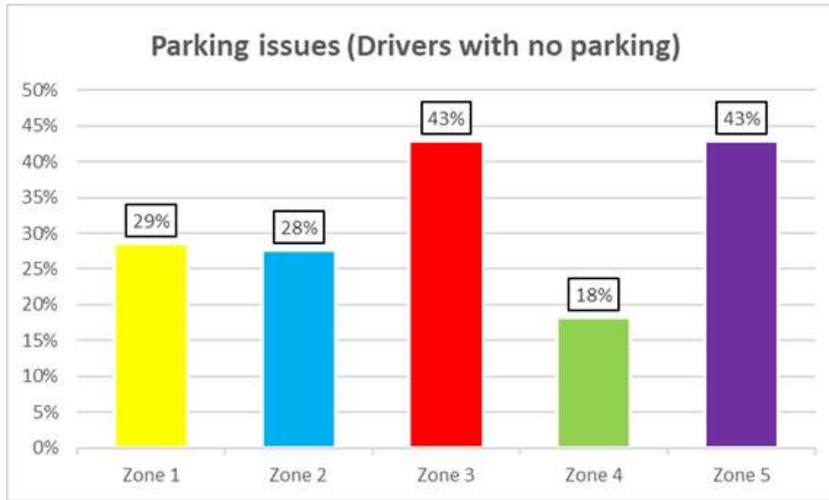
80% of drivers in Zone 5 don't have access to on-site parking.



Unsurprisingly, those drivers with no access to on-site parking are more likely to report experiencing parking problems, in particular Zone 5.



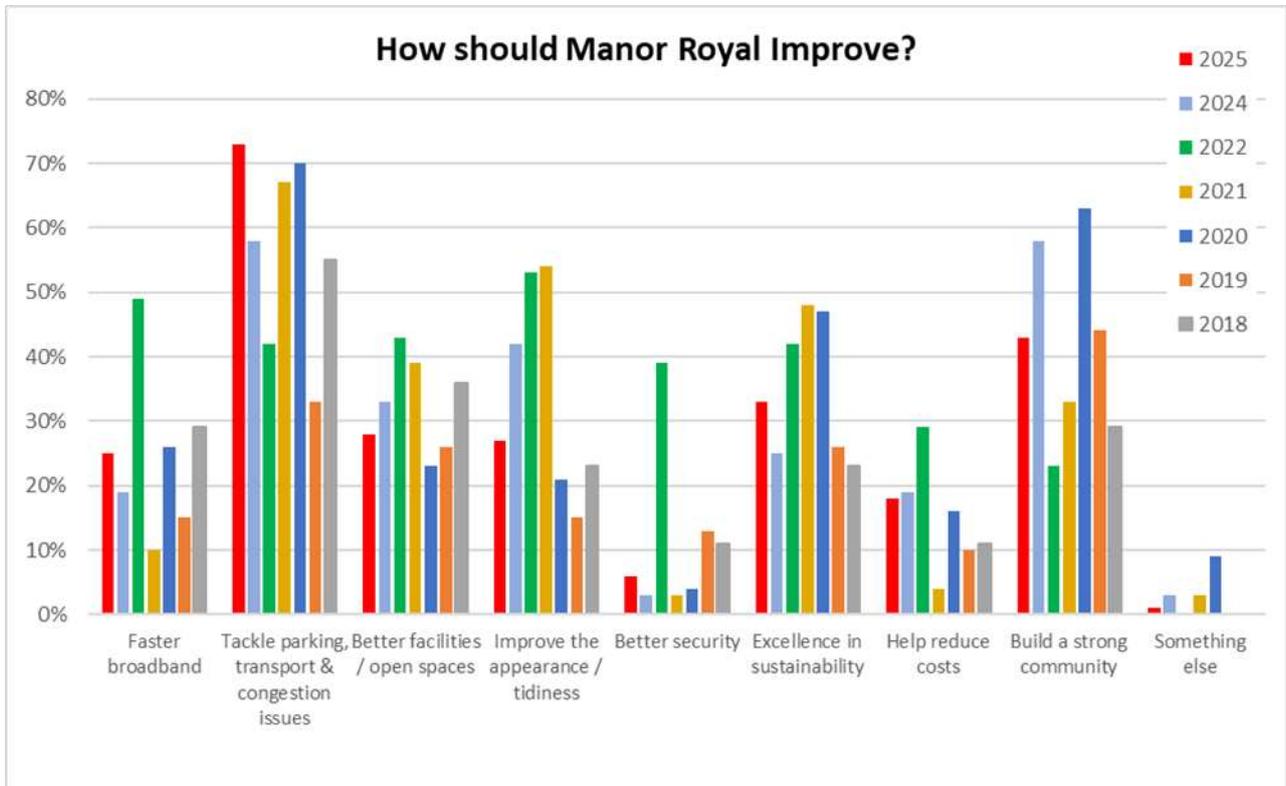
However, the relatively low number of responses in 2025, particularly from certain zones, warrants revisiting the 2024 survey results where the response rate was higher and is shown in the graph below.



This shows that there is reasonable proportion of car drivers from across all zones of Manor Royal who do not have access to on-site parking and experience problems.

5. FEEDBACK FROM MANOR ROYAL MATTERS, NOVEMBER 2025

At the Manor Royal Matters Conference (04 November 2025), participants took part in an electronic polling exercise. While satisfaction levels with doing business on Manor Royal remain high (98% reported either being satisfied or very satisfied), parking and transport issues top the poll when delegates were asked how they wanted Manor Royal to improve. A consistent finding.



6. RECOMMENDATIONS FOR ACTION

As per the 2024 survey, Velocity recommend several actions in support of improving travel and transport in Manor Royal and include:

1. **Conduct a Healthy Streets Audit:** similar to those adopted as part of the planning process throughout London Boroughs, this would identify the perceived shortcomings in terms of physical limitations to active travel/public transport on the ground in/surrounding the BID and create a list of improvements to the street environment that will encourage more walking, wheeling and cycling in the
2. **Marketing and promotion:** A key focus of the Move It programme, to help promote sustainable/active travel among employees and support modal shift by making commuters aware of their options, including the incentives available to them to travel differently. Through Move It this has been happening on a consistent basis with online resources (Travel Hub) now available in addition to company roadshows and marketing via the Manor Royal BIDs comms channels.
3. **On-street parking audit:** Requires the cooperation of both Councils, although a commitment has been made by the BID to use the Manor Royal BID Rangers to assist. This would help identify those areas and roads in Manor Royal most badly impacted by inconsiderate and long-stay parking.
4. **Review cycling and walking routes:** Beyond the strategic level appraisal of routes that might be offered by the Local Cycling and Walking Investment Plan (LCWIP), this should also include aspects of the commuters/users experience of walking and cycling around the area including condition survey, signage and safety. Some of this might be achieved through a well-designed Healthy Streets Audit.

In addition, the following actions are also worthy of consideration:

5. **Manor Royal BID Projects Pack:** As well as large scale (signature) projects, some of which are being delivered with Town Deal funding, the projects pack identifies a number of areas as “grot spots”. This is where there is an accumulation of lower-level issues (e.g. verge damage and kerb over-runs) that have the effect of degrading the area and making it unattractive. Tackling these “grot spots”, in line with the philosophy of the Healthy Streets Audit approach, would help uplift the area and make it more desirable to be and encourage active travel by making the environment more appealing.
6. **Future support of Move It:** Contributions from the Manor Royal BID alongside the original investment as part of the Crawley Growth Programme, has extended the life of Move It beyond the original two years. The programme was Launched in February 2024 with the appointment of the Move It Project Manager and has made a good impact. Benefits include the delivery of a programme of in-company sustainable travel promotional roadshows, closer partnership working and collaboration with key partners (e.g. Metrobus and more recently the Crawley Wellbeing Team), production of travel resources and promotional literature, intelligence gathering and research, good levels of business and employee engagement. However, without further investment there are insufficient funds to sustain Move It beyond September / October 2026.