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# **RETAIL REPORT for Adur's Town Centres**

for

Adur District Council

125 Old Broad Street  
London EC2N 2BQ

July 2012

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## 1. Introduction

1.1 Adur District Council is in the process of producing a new Local Plan for the District to replace their 1996 Local Plan and to reflect the new National Planning Policy Framework (NPPF). As part of this, the Council have commissioned DTZ to assess and define the town centre boundaries of Shoreham-by-Sea, Lancing and Southwick town centres, in addition to their primary and secondary shopping frontages. We also consider separate policies for change of use within each town centre (where appropriate).

1.2 The remainder of this section outlines our approach to these elements of work. For clarity, the report is then structured as follows:

- Shoreham-by-Sea;
- Lancing; and
- Southwick.

### ***Town Centre Boundaries***

1.3 To inform our assessment of town centre boundaries, we have considered both the existing (1996 Local Plan) and the Council's proposed town centre boundaries for Shoreham-by-Sea, Lancing and Southwick. We have undertaken detailed site inspections of each town centre in order to record the extent and composition of main town centre uses (as defined by the NPPF<sup>1</sup>); understand levels of accessibility and connectivity; and identify any future development opportunities for main town centre uses. With regards to the latter, the NPPF requires local planning authorities to adopt a pro-active and 'town centre first' approach to the identification of a sufficient supply of sites for main town centre uses.

1.4 We therefore consider the following principles in our assessment of town centre boundaries:

- include main town centre uses that are well connected to the retail area;
- include sites that represent future development opportunities for main town centre uses, namely those that are well connected to the retail area and its primary shopping frontages;
- exclude areas that predominantly comprise residential uses or other non-main town centre uses; and
- have regard for physical barriers to pedestrian movements (i.e. major roads, railway lines).

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<sup>1</sup> Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

- 1.5 These principles have helped us to define the alignment of our proposed town centre boundaries for Shoreham-by-Sea, Lancing and Southwick.

### ***Primary and Secondary Shopping Frontages***

- 1.6 To inform this element of work, we have considered both the existing (1996 Local Plan) and the Council's proposed primary and secondary shopping frontages for Shoreham-by-Sea, Lancing and Southwick. We have undertaken detailed site inspections of each town centre and, subsequently, the frontages of each town centre have been split into blocks (for analysis purposes) and their composition of uses analysed on a block-by-block basis. This analysis has utilised data from Experian Goad (where available), which has been updated during our site inspections of each town centre. In addition, the extent of primary and secondary shopping frontages has been informed by pedestrian flows<sup>2</sup> and rental levels within each town centre.
- 1.7 On this basis, our proposed primary and secondary shopping frontages have regard for the following principles:
- composition of uses;
  - key 'anchors' / attractors;
  - levels of accessibility and connectivity;
  - pedestrian flows; and
  - rental levels.
- 1.8 These principles have helped us to define the extent of primary and secondary shopping frontages within Shoreham-by-Sea, Lancing and Southwick.

### ***Change of Use Policies***

- 1.9 We propose separate policies for change of use within specific parts of each town centre (where appropriate), which would enable the Council to manage shopping frontages and permit only compatible retail and service uses. For example, it may be appropriate for the Council to afford greater flexibility for change of use along secondary shopping frontages than primary, in order to reduce the higher vacancy rates in the former and sustain a diverse composition of uses therein.
- 1.10 This element of work is underpinned by the aforementioned block-by-block analysis, in addition to our professional judgement and knowledge of town centre issues.

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<sup>2</sup> The Council have commissioned PMRS (Pedestrian Market Research Services) to undertake pedestrian count surveys within Shoreham-by-Sea town centre. For Lancing and Southwick, pedestrian flows were observed during our site inspections.

## 2. Shoreham-by-Sea

- 2.1 Shoreham-by-Sea has the largest town centre in Adur, extending north-south along East Street / Brunswick Road and east-west along High Street. The town centre performs a major role in the District's shopping hierarchy, and includes Shoreham-by-Sea railway station with direct links to London, Brighton and Worthing. In the 1996 Local Plan, Shoreham-by-Sea is identified as a 'town centre'.

### *Town Centre Boundaries*

- 2.2 Following detailed site inspections, we have identified the distribution of retail and service uses within the town centre, in addition to other main town centre uses as defined by the NPPF (including offices, leisure and entertainment facilities). This has demonstrated that the existing (1996 Local Plan) town centre<sup>3</sup> is, in our view, too extensive; and comprises areas that are either not predominantly occupied by main town centre uses or not well connected to the retail area, or both.
- 2.3 Accordingly, we have consolidated the extent of the town centre to reflect the distribution of existing, and any future development opportunities for main town centre uses (refer to Appendix A). The following commentary explains the alignment of our proposed town centre boundary for Shoreham-by-Sea:
- **Area to the south of New Road / Brighton Road** – The narrow strip of land to the south of New Road (and to the north of Brighton Road) predominantly comprises residential uses, in addition to the Frosts car showroom fronting onto Brighton Road. Given that these are not main town centre uses, this area is excluded from the town centre boundary (which has been drawn along New Road but encompasses the Jet petrol station fronting onto Brighton Road). From west to east, the area to the south of Brighton Road comprises the harbour (including Sussex Yacht Club), the former Parcel Force site<sup>4</sup> and the Montgomery Motors and Frosts car showrooms. Some B1 office uses and B2 general industrial uses exist to the rear (south) and east of these car showrooms. The B1 office uses form part of Riverside Business Centre. Whilst in principle they could be considered main town centre uses in NPPF terms, these B1 office uses are physically separated from the town centre by the A259 (Brighton Road). This is a major 'A' road linking Shoreham-by-Sea with Brighton (eastbound) and Worthing (westbound) and beyond; on which traffic flow data<sup>5</sup> indicates an average of 8,719 (eastbound) and 8,390 (westbound) movements per day. This high level of vehicular movements supports our

<sup>3</sup> It is our understanding that the town centre (as shown on the 1996 Proposals Map) constitutes the town centre 'inset' – no town centre 'boundary' is defined.

<sup>4</sup> This site has planning permission (ref. AWDM/0501/12) for a mixed use scheme comprising 132 residential units, a foodstore (1,265 sq metres) and ancillary commercial floorspace (121 sq metres).

<sup>5</sup> Traffic flow data has been sourced from West Sussex County Council (January 2011).

view that Brighton Road is a physical barrier to pedestrian movements and, as a result, the area south of it and east of High Street is not well connected to the town centre. In addition, the Shoreham Harbour Capacity and Viability Study (AECOM, March 2011) proposes that the area to the south of Brighton Road forms part of a wider employment area *“providing a link between the town centre in the west and a new waterside residential neighbourhood to the east”*. We therefore consider it appropriate to exclude this area from the town centre boundary.

- **Area to the south of High Street, immediately west of footbridge** – This small area lies to the rear of main town centre uses fronting onto High Street. In addition, it comprises a designated Site of Special Scientific Interest (SSSI) and is therefore excluded from the town centre boundary.
- **Area to the east of Eastern Avenue** – This area (between the railway line to the north and Brighton Road to the south) comprises a triangular area of open space and Dunelm Mill, with its associated parking and servicing arrangements. A number of other ‘bulky goods’ retail warehouses (including Halfords and B&Q) are situated further to the east, fronting onto Brighton Road. We consider it appropriate to exclude these retail warehouses from the town centre boundary, as they function as out-of-centre retailing with their own self-contained car parks. The Council’s Civic Centre (to the immediate west of Eastern Avenue) is currently in B1 office use and is thus a main town centre use in NPPF terms. It also has good public transport links and pedestrian connections to the town centre via Ham Road, as demonstrated by the pedestrian count surveys undertaken by PMRS (detailed below). Whilst there are residential uses on the south side of Ham Road (to the east of the Co-Op supermarket), these are no barrier to pedestrian connectivity between the Civic Centre and the current retail core of the town centre. It is therefore appropriate to include the Civic Centre within the town centre boundary. In the event that the site was redeveloped for a food/non-food superstore, that would also be a main town centre use which would be appropriate to include within the town centre boundary.
- **Area to the north of the railway line (excluding the main town centre uses along Buckingham Road)** – This area is not well connected to the town centre, being physically separated from it by the railway line; whilst there is no existing (or proposed) pedestrian route which provides safe and convenient access to the town centre. Further, this area is predominantly occupied by residential uses and does not comprise any future development opportunities for main town centre uses. For clarity, we consider it appropriate to exclude the employment area(s) to the west of the A283 (to the north of the railway line) from the town centre boundary due to reasons of connectivity, and the fact that these are not main town centre uses.
- **Area to the west of the town centre (as proposed) and south of the railway** – This area is predominantly occupied by residential uses and does not comprise any future

development opportunities for main town centre uses. For these reasons, our proposed town centre boundary skirts the distribution of main town centre uses, town centre car parks and the mixed use development to the west of High Street (which comprises the Ropetackle Arts Centre and other main town centre uses at ground level).

### **Primary and Secondary Shopping Frontages**

2.4 The town centre has been split into eight blocks of frontages (refer to Appendix B) based on our site inspections of the town centre and subsequent analysis of Experian Goad data, which has been updated for the purpose of this report.

2.5 Table 2-1 below analyses the composition of uses within these blocks (by percentage), as follows:

- Comparison Retail (A1);
- Convenience Retail (A1);
- Total Retail (A1);
- A3 Service;
- Non-A3 Service (A2/A4/A5);
- Total Service (A2/A3/A4/A5);
- Office;
- Vacant; and
- Miscellaneous (i.e. hotels, schools, places of worship, residential care homes).

Block	No. of Units	Comparison Retail (%)	Convenience Retail (%)	Total Retail (%)	A3 Service (%)	Non-A3 Service (%)	Total Service (%)	Office (%)	Vacant (%)	Misc (%)
1	14	14.3	14.3	28.6	7.1	42.9	50	7.1	0	14.3
2	30	23.3	13.3	36.6	6.7	40	46.6	3.3	0	13.3
3	27	25.9	3.7	29.6	0	51.8	51.8	14.8	3.7	0
4	26	26.9	15.4	42.3	3.8	38.5	42.3	0	7.7	7.7
5	21	66.7	4.7	71.4	0	23.8	23.8	0	4.7	0
6	27	18.5	18.5	37	0	37	37	7.4	7.4	11.1
7	24	20.8	0	20.8	16.7	50	66.7	4.1	4.1	4.1
8	23	21.7	4.3	26	17.4	52.2	69.6	0	4.3	0

**Table 2-1** (Source: Experian Goad, April 2012 DTZ Update)

2.6 In addition to the composition of uses, our recommended frontage designations within Shoreham-by-Sea town centre have been informed by measured pedestrian flows and our understanding of shop rental levels.

2.7 With regards to the former, PMRS have been commissioned by the Council to undertake pedestrian count surveys within Shoreham-by-Sea town centre in order to help define the extent of primary and secondary shopping frontages. A total of 20 count points were identified throughout the town centre (refer to Appendix F), with pedestrian count surveys undertaken on Friday 11<sup>th</sup> May and Saturday 12<sup>th</sup> May between the hours of 10am and 5pm. A copy of PMRS's report is enclosed at Appendix G, the findings of which are considered below<sup>6</sup>.

**Block 1**

*Composition of Uses*

2.8 Block 1 comprises two frontages either side of Buckingham Road, to the north of the railway line. Half of these premises are occupied by services, and 42.9% are non-A3 services (including three hot food takeaways, one hairdresser and one estate agent). There is an even split of units occupied by comparison goods retail and convenience goods retail (14.3% each), including One Stop convenience store. Our site inspections recorded no vacant units within this block.

*Pedestrian Flows*

2.9 Block 1 benefits from a large walk-in catchment to the north of the town centre, and includes two bus stops. Pedestrian count points 11 and 12 are situated within this block, either side of Buckingham Road.

2.10 Table 2-2 below indicates that low to moderate levels of pedestrian flows were recorded within Block 1, with pedestrian flows relatively higher on the east side of Buckingham Road at count point 12 (ranked 10<sup>th</sup>) than count point 11 (ranked 17<sup>th</sup>). These findings are likely to reflect accessibility and, specifically, the location of Shoreham-by-Sea railway station to the east of Buckingham Road.

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4

<sup>6</sup> The findings of the pedestrian count surveys have been indexed as a percentage of the highest pedestrian flows for Friday 11<sup>th</sup> May and Saturday 12<sup>th</sup> May, in addition to estimated pedestrian flows for a whole week.

6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-2** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

#### *Rental Levels*

- 2.11 We understand that shop rental levels within this block are in the region of £28-40 / sq foot, which are amongst the highest for the town centre.

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.12 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix A).

#### **Block 2**

#### *Composition of Uses*

- 2.13 Block 2 on the east side of Brunswick Road consists of a broad mix of main town centre uses, extending southwards from the railway line to Tarmount Lane. This block includes the town centre's main supermarket (Co-Op) at the Gateway Shopping Precinct off Ham Road. Almost half (46.6%) of the units are occupied by services, and 40% are non-A3 services. There are also a high proportion of retailers (23.3% comparison goods and 13.3% convenience goods) within Block 2. Our site inspections recorded no vacant units within this block.

### *Pedestrian Flows*

- 2.14 Block 2 comprises Shoreham-by-Sea railway station to the north and two bus stops along Ham Road. It also comprises a mix of town centre uses, including the Co-Op supermarket. Pedestrian count points 13, 14, 15 and 16 are situated within this block.
- 2.15 Table 2-3 below shows that pedestrian flows were highest at count points 13 (ranked 6<sup>th</sup>), between the railway station and the wider town centre, and 14 (ranked 7<sup>th</sup>), the entrance to the Gateway Shopping Precinct. The latter is likely to be attributable to the Co-Op supermarket, which is one of the town centre's key attractors. In addition, moderate levels of pedestrian flows were recorded at count points 15 (ranked 9<sup>th</sup>) and 16 (ranked 12<sup>th</sup>).

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-3** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

### *Rental Levels*

- 2.16 Shop rental levels within this block are understood to be in the region of £28-40 / sq foot, which are amongst the highest for the town centre.

## RECOMMENDED FRONTAGE DESIGNATION

- 2.17 On the basis of the above, we recommend that frontages south of Ham Road within this block are designated *primary shopping frontages* (excluding Shoreham-by-Sea Methodist Church). It is our view that this designation should also be extended along Ham Road on its south side (between Brunswick Road and the Co-Op car park) in recognition of the relatively high pedestrian flows to and from the Gateway Shopping Precinct, which includes the town centre's main supermarket (refer to Appendix A). North of Ham Road, the only property is not in A1 retail use, and we therefore recommend that the *secondary shopping frontages* north of the railway be extended southwards to include this property, together with the return frontage on the north side of Ham Road as far east as the residential uses.

### Block 3

#### Composition of Uses

- 2.18 Block 3 comprises frontages on the west side of Brunswick Road, extending southwards from the railway line to St Marys Road. Over half (51.8%) of these premises are occupied by services, including the Post Office and six financial and professional services (such as banks, estate agents and betting shops). There are no A3 services, whilst around a quarter (25.9%) of the units are occupied by comparison goods retailers. Block 3 also includes four offices (14.8%) and one vacant unit (3.7%).

#### Pedestrian Flows

- 2.19 Block 3 includes count point 8 (on St Marys Road) and count points 9 and 10 (on the west side of Brunswick Road).
- 2.20 Table 2-4 below indicates that pedestrian flows were highest at count point 8 (ranked 3<sup>rd</sup>); this location is a key pedestrian thoroughfare and links the northern and southern parts of the town centre. In contrast, relatively low levels of pedestrian flows were observed at count point 10 (ranked 15<sup>th</sup>). PMRS recorded moderate to high levels of pedestrian flows outside the Post Office at count point 9 (ranked 8<sup>th</sup>).

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1

8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-4** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

#### *Rental Levels*

- 2.21 Shop rental levels within this block are understood to be in the region of £28-40 / sq foot, which are amongst the highest for the town centre.

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.22 On the basis of the above, we recommend that frontages within this block, excluding those north of the junction with Ham Road, are designated *primary shopping frontages*. In light of pedestrian flows between Brunswick Road and East Street, we consider it appropriate to extend this primary frontage designation to include the main town centre uses along St Marys Road (refer to Appendix A). We recommend that the frontages north of the junction with Ham Road are designated as *secondary shopping frontages*, as the only two properties concerned are not in A1 retail use.

#### **Block 4**

#### *Composition of Uses*

- 2.23 Block 4 is between St Marys Road (to the north) and Brighton Road (to the south) on the east side on East Street. It broadly comprises an even split of retailers and services (42.3% each), including a number of independent retailers (i.e. antiques, florists, grocers) and services (i.e. bakers, delicatessens, restaurants). Some 7.7% of the units within this block are vacant, the highest proportion within the town centre.

#### *Pedestrian Flows*

- 2.24 Block 4 fronts onto the grounds of The Church of St Mary de Haura (to the north), an attractive part of the town centre which is popular with visitors, and leads onto the

pedestrianised section of East Street (to the south). Pedestrian count points 6, 7, 8 and 17 are situated within this block.

- 2.25 Table 2-5 below shows that pedestrian flows at count points 6, 7 and 8 were the highest within Shoreham-by-Sea, thus supporting the view that East Street is the town centre's key pedestrian thoroughfare. The pedestrian count surveys recorded low levels of pedestrian flows at count point 17 (ranked 20<sup>th</sup>), which leads onto New Road and the southeast of the town centre.

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-5** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

#### *Rental Levels*

- 2.26 Shop rental levels within this block are understood to be in the region of £28-40 / sq foot, which are amongst the highest for the town centre.

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.27 On the basis of the above, we recommend that frontages within this block, including the short frontage to New Road on its north side, are designated *primary shopping frontages* (refer to Appendix A).

## **Block 5**

### *Composition of Uses*

- 2.28 Block 5 comprises frontages on the west side of East Street (excluding The Church of St Mary de Haura) and on the north side of High Street (between Church Street and East Street). Our analysis shows that this block is dominated by comparison goods retailers (66.7%) including WHSmith, three charity shops, two electrical stores and one jeweller. Almost a quarter (23.8%) of the units are occupied by services, none of which are A3 uses. The block contains one vacant unit (4.7%).

### *Pedestrian Flows*

- 2.29 Block 5 benefits from wide pavements and an attractive public realm, whilst the southern section of East Street is pedestrianised. Pedestrian count points 5 and 6 are situated within this block.
- 2.30 Table 2-6 below indicates that high levels of pedestrian flows were recorded at count points 5 (ranked 4<sup>th</sup>) and 6 (ranked 2<sup>nd</sup> at 96% of the highest recorded flow). These findings reflect East Street's connectivity to the wider town centre, and its inherent retail attractions..

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-6** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

#### *Rental Levels*

- 2.31 Shop rental levels within this block are also understood to be in the region of £28-40 / sq foot.

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.32 On the basis of the above, we recommend that frontages within this block are designated *primary shopping frontages* (refer to Appendix A).

## **Block 6**

### *Composition of Uses*

- 2.33 Block 6 between Ship Street and Church Street on the north side of High Street comprises an even split of units occupied by comparison goods retail and convenience goods retail (18.5% each). The frontage includes a number of key attractors including a Co-Op supermarket, Boots chemist and The Original Factory Shop variety store. It also comprises a high proportion of non-A3 services (37%) but no A3 uses. Our site inspections recorded two vacant units within this block (7.4%). This block includes some of the largest retail premises in the town centre, and several multiple retailers and service businesses.

### *Pedestrian Flows*

- 2.34 Block 6 includes one bus stop and on-street parking along its frontage. Pedestrian count points 3 and 4 are situated within this block.
- 2.35 Table 2-7 below shows that pedestrian flows were highest at count point 4 (ranked 5<sup>th</sup> at 59% of the highest recorded flow), in proximity to the Co-Op supermarket on the north side of High Street. PMRS observed substantially lower pedestrian flows at the west end of Block 6 at count point 3 (ranked 11<sup>th</sup> with only 28% of the highest recorded flow).

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-7** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

### *Rental Levels*

- 2.36 Shop rental levels within this block are again understood to be in the region of £28-40 / sq foot.

### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.37 On the basis of the above, we recommend that frontages within this block are designated *primary shopping frontages* (refer to Appendix A).

### **Block 7**

#### *Composition of Uses*

- 2.38 Block 7 comprises frontages on the north side of High Street, between Ship Street and the Old Shoreham Road / Victoria Road junction. Reflective of the secondary shopping nature of this block, the majority of units (66.7%) are occupied by services, and 16.7% are A3 services (i.e. cafes, restaurants). None of the units within this block are occupied by convenience goods retailers. Our analysis also shows that 20.8% of the premises are occupied by comparison goods retailers, the majority of which are independent retailers. Block 7

comprises one vacant unit (4.1%). The premises in this block are significantly smaller than most of those in Block 6.

#### *Pedestrian Flows*

- 2.39 Block 7 is located on the western edge of the town centre and includes two bus stops. Pedestrian count points 1 and 2 are situated within this block.
- 2.40 Table 2-8 below indicates that pedestrian flows were relatively low at count point 2 (ranked 13<sup>th</sup>) and, in particular, count point 1 (ranked 19<sup>th</sup> with only 14% of the highest recorded flow). These findings reflect the lack of attractions within Block 7, and thus the secondary nature of the shopping frontages. This block is also not an important linking street between different parts of the town centre, being on the western periphery of the retail area.

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20
18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-8** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

#### *Rental Levels*

- 2.41 Whilst shop rental levels within this block are understood to be in the region of £28-40 / sq foot, we would expect rents to be at the lower end of this range at the western end of Block 7.

*RECOMMENDED FRONTAGE DESIGNATION*

2.42 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix A).

**Block 8**

*Composition of Uses*

2.43 Block 8 comprises frontages to the south of High Street. Over two-thirds (69.6%) of these premises are occupied by services, including 52.2% non-A3 and 17.4% A3. The block also contains 21.7% of units occupied by comparison goods retailers; these are attributed to independent retailers of children’s toys, clothing, gifts and sports goods. Our analysis shows that Block 8 includes one vacant unit (4.3%).

*Pedestrian Flows*

2.44 Block 8 includes one bus stop and on-street parking along its frontage. Pedestrian count points 18, 19 and 20 are situated within this block.

2.45 Table 2-9 below shows that consistently low levels of pedestrian flows were recorded on the south side of High Street at count points 18 (ranked 14<sup>th</sup>), 19 (ranked 16<sup>th</sup>) and 20 (ranked 18<sup>th</sup>). These findings indicate that pedestrian flows are restricted by the A259 (High Street), which acts as a substantial barrier to connection with the remainder of the retail area.

Count Point	Address	Friday (% of highest flow)	Saturday (% of highest flow)	Week (% of highest flow)	RANK
1	88 High Street	20	11	14	19
2	72 High Street	41	18	25	13
3	56-58 High Street	47	21	28	11
4	28-30 High Street	90	47	59	5
5	10 High Street	92	53	64	4
6	7 East Street	87	99	96	2
7	34 East Street	97	100	100	1
8	2 St Marys Road	100	61	72	3
9	11-17 Brunswick Road	54	26	34	8
10	29 Brunswick Road	38	18	23	15
11	9-11 Buckingham Road	31	15	19	17
12	2-4 Buckingham Road	43	24	30	10
13	Brunswick Road	66	33	42	6
14	Off Ham Road	50	28	34	7
15	22 Brunswick Road	53	22	30	9
16	Tarmount Lane	33	22	25	12
17	New Road	19	9	12	20

18	33 High Street	30	21	23	14
19	53 High Street	35	18	23	16
20	73 High Street	28	14	18	18

**Table 2-9** (Source: PMRS Pedestrian Footfall Standard Report, May 2012)

### *Rental Levels*

- 2.46 Shop rental levels within this block are understood to be in the region of £18-21 / sq foot. The southern side of High Street / Brighton Road achieves lower rental levels than other blocks in the town centre, given that this busy 'A' road is a physical barrier to pedestrian movements.

### *RECOMMENDED FRONTAGE DESIGNATION*

- 2.47 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix A).

## **Change of Use Policies**

- 2.48 In addition to advising on the designation of primary and secondary shopping frontages within Shoreham-by-Sea town centre, it may be appropriate for the Council to consider separate policies for change of use within each block. Suggested policies (informed by our frontage analysis) are outlined below:

- **Blocks 1 / 7 / 8** – Our frontage analysis has demonstrated that these blocks are secondary in nature, comprising the highest proportion of service uses. The pedestrian count surveys carried out by PMRS recorded relatively low levels of pedestrian flows within these blocks. On this basis, we consider that Blocks 1 / 7 / 8 should be afforded complete flexibility for change of use within Classes A1 to A5, in order to sustain mixed use frontages and maximise the number of occupied units.
- **Blocks 2 / 3 / 5 / 6** – Our frontage analysis has shown that these blocks comprise the majority of the town's main retail 'anchors' and attract the highest levels of pedestrian flows. The mix of retail uses (i.e. bakers, chemists, convenience stores) is supplemented with day-to-day service uses (i.e. banks, cafes, dry cleaners). We consider that, in order to sustain the vitality and viability of these primary shopping frontages, the Council should seek to restrict further changes of use to non-retail / service uses. However, we consider that A3 uses would be preferable to long-term vacancies, if after extended marketing A1 uses cannot be attracted to vacant premises.
- **Block 4** – Whilst we recommend that the east side of East Street is designated primary shopping frontage, our detailed frontage analysis has identified a number of independent 'niche' retail and service uses within Block 4. The attraction of such uses has far reaching benefits, from increasing dwell time to encouraging linked trip to the town centre. On this



basis, we consider that the Council should (a) prevent change of use to A2 financial and professional services, and (b) afford a degree of flexibility for changes of use to A3 restaurants and cafes. The latter uses would complement the nature and function of this frontage, which benefits from an attractive setting and fronts onto the town's key pedestrian thoroughfare (part of which is pedestrianised).

### 3. Lancing

- 3.1 Lancing has a linear town centre along North Road and South Street. The town performs an important role in the District's shopping hierarchy, and includes Lancing railway station with direct links to London, Brighton and Worthing. In the 1996 Local Plan, Lancing is identified as a 'town centre'.

#### ***Town Centre Boundaries***

- 3.2 Following detailed site inspections, we have identified the distribution of retail and service uses within the town centre, in addition to other main town centre uses as defined by the NPPF (including offices, leisure and entertainment facilities). This has demonstrated that the existing (1996 Local Plan) town centre<sup>7</sup> is, in our view, too extensive; and comprises areas that are either not predominantly occupied by main town centre uses or not well connected to the retail area, or both.
- 3.3 Accordingly, we have consolidated the extent of the town centre to reflect the distribution of existing, and any future development opportunities for main town centre uses (refer to Appendix C). We consider that our proposed town centre boundary is consistent with the aims and objectives of the 'Lancing Vision' report. The following commentary explains the alignment of our proposed town centre boundary for Lancing:
- **Area to the north of the railway line** – Beyond the main town centre uses fronting onto North Road, this area (namely to the north) comprises a number of residential uses and a large recreation ground. We have excluded such areas from the town centre boundary. In addition, whilst there is a parade of shops along the north side of Crabtree Lane, these are physically detached from the town centre by virtue of distance (c. 200 metres), the fact that no main town centre uses exist between these shops and the town centre boundary (as proposed), and the significant traffic flows on Crabtree Lane. This parade of shops performs a local shopping function and predominantly serves a local walk-in catchment. On this basis, we consider it appropriate to exclude this parade of shops from the town centre boundary.
  - **Area to the east of South Street** – Pockets of residential uses are situated to the rear of the main town centre uses fronting onto South Street. For this reason, our proposed town centre boundary skirts the distribution of main town centre uses (thus excluding the residential uses to the rear). The boundary also encompasses the former laundry site off Alma Street (and adjacent residential uses off East Street) given that this area potentially represents a future development opportunity for main town centre uses. A further option

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<sup>7</sup> It is our understanding that the town centre (as shown on the 1996 Proposals Map) constitutes the town centre 'inset' – no town centre 'boundary' is defined.

is to include the car park (between Penhill Road and Roberts Road) within the town centre boundary, as this also potentially represents a future development opportunity.

- **Area to the west of South Street** – We support the inclusion of Asda (and associated parking and servicing arrangements) within the town centre boundary. The area to the west of Asda, and to the rear of the main town centre uses fronting onto South Street, predominantly comprises residential uses. Further, we have identified no future development opportunities therein for main town centre uses. Our proposed town centre boundary therefore skirts the distribution of main town centre uses to the west of South Street.
- **Area to the south of South Street / Grinstead Lane junction** – This area contains a number of residential uses fronting onto South Street which, in effect, serve to break and fragment the shopping frontage. Notwithstanding this, we consider the level of connectivity between the main town centre uses to be sufficient to include these frontages (including the residential uses) within the town centre boundary.

### ***Primary and Secondary Shopping Frontages***

3.4 The town centre has been split into six blocks of frontages (refer to Appendix D) based on our site inspections of the town centre and subsequent analysis of Experian Goad data, which has been updated for the purpose of this report.

3.5 Table 3-1 below analyses the composition of uses within these blocks (by percentage), as follows:

- Comparison Retail (A1);
- Convenience Retail (A1);
- Total Retail (A1);
- A3 Service;
- Non-A3 Service (A2/A4/A5);
- Total Service (A2/A3/A4/A5);
- Office;
- Vacant; and
- Miscellaneous (i.e. hotels, schools, places of worship, residential care homes).

Block	No. of Units	Comparison Retail (%)	Convenience Retail (%)	Total Retail (%)	A3 Service (%)	Non-A3 Service (%)	Total Service (%)	Office (%)	Vacant (%)	Misc (%)
1	42	40.5	7.1	47.6	0	28.6	28.6	4.7	7.1	11.9
2	24	16.6	8.3	25	8.3	45.8	54.1	0	12.5	8.3
3	33	15.1	6.1	21.2	6.1	57.6	63.6	3	9	3

4	17	35.3	0	35.3	0	23.5	23.5	0	5.9	35.3
5	12	33.3	8.3	41.6	16.6	25	41.6	0	8.3	8.3
6	25	24	8	32	4	48	52	0	16	0

**Table 3-1** (Source: Experian Goad, April 2012 DTZ Update)

- 3.6 In addition to the composition of uses, our recommended frontage designations within Lancing town centre have been informed by measured pedestrian flows and our understanding of shop rental levels.

### **Block 1**

#### *Composition of Uses*

- 3.7 Block 1 comprises frontages on the west side of North Road, north of the railway as far as the police station. Residential uses and places of worship dominate the frontage north of the police station to Crabtree Lane and have therefore been excluded from the proposed town centre boundary, and from the frontage analysis. Almost half (47.6%) of the units are occupied by retail uses, and 40.5% are attributed to comparison goods retailers. This block contains the town centre's main retail 'anchors' (including Boots, Co-Op and WHSmith), complemented by a range of non-A3 services (28.6%). Our site inspections recorded no A3 services but three vacant units (7.1%).

#### *Pedestrian Flows*

- 3.8 During our site inspections, we observed relatively high levels of pedestrian flows between the railway line (to the south) and the Co-Op supermarket (to the north); pedestrian flows dropped northwards of the Co-Op supermarket.

#### *Rental Levels*

- 3.9 Shop rental levels within this block are understood to be in the region of £21-25 / sq foot, which are the highest levels for the town centre (i.e. north of the railway line).

### **RECOMMENDED FRONTAGE DESIGNATION**

- 3.10 On the basis of the above, we recommend that frontages within this block – between the railway line (to the south) and the Co-Op supermarket (to the north) – are designated *primary shopping frontages* (refer to Appendix C).

### **Block 2**

#### *Composition of Uses*

- 3.11 Block 2 is on the east side of North Road, to the north of the railway line as far as the Queensway Shopping Precinct. Residential uses dominate the frontage north of Queensway

Shopping Precinct to Crabtree Lane and have therefore been excluded from the proposed town centre boundary, and from the frontage analysis. A quarter of the premises are occupied by retailing, including 16.6% comparison goods and 8.3% convenience goods. Almost half (45.8%) of the units are occupied by non-A3 services, most of which are A2 financial and professional services such as banks, estate agents and betting shops. The block also comprises Freshbrook School, the Post Office and three vacant units (12.5%) at the Queensway Shopping Precinct.

#### *Pedestrian Flows*

- 3.12 During our site inspections, we observed relatively moderate levels of pedestrian flows along this frontage. We also observed high levels of road crossings between this (the east) and the west side of North Road, particularly to and from the Post Office.

#### *Rental Levels*

- 3.13 We understand that shop rental levels within this block are in the region of £21-25 / sq foot, which are amongst the highest for the town centre (i.e. north of the railway line).

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 3.14 On the basis of the above, we recommend that frontages within this block are designated *primary shopping frontages* (refer to Appendix C).

### **Block 3**

#### *Composition of Uses*

- 3.15 Block 3 comprises an area to the south of the railway line, encompassing the Asda supermarket and frontages to the east and west of South Street (as far south as the South Street / Grinstead Lane junction). The town's main supermarket (Asda) is set back from the shopping frontage, which is dominated by service uses (57.6% non-A3 and 6.1% A3) including three estate agents, three hairdressers and two cafes. There are three vacant units (9%) within this block.

#### *Pedestrian Flows*

- 3.16 During our site inspections, we observed relatively high levels of pedestrian flows between the Asda supermarket and frontages to the north of the railway line; which demonstrates that linked trips are being made between Asda and the northern part of the town centre. We observed relatively moderate levels of pedestrian flows along frontages on the west side of South Street (to the south of Asda), whilst pedestrian flows were also relatively low on the east side of South Street.

#### *Rental Levels*

- 3.17 We understand that shop rental levels decrease to the south of the railway line. This block is understood to achieve rental levels below the highest for the town centre (c. £21-25 / sq foot).

#### **RECOMMENDED FRONTAGE DESIGNATION**

- 3.18 Whilst this block has a high proportion of service uses, and low pedestrian flows on the east side of South Street, the presence of Asda indicates its importance to the town centre. It is also part of the area identified as the 'village heart' in the 'Lancing Vision' report. We therefore recommend that frontages within this block are designated *primary shopping frontages* (refer to Appendix C).

#### **Block 4**

##### *Composition of Uses*

- 3.19 Block 4 comprises frontages on the east and west sides of South Street, from south of the South Street / Grinstead Lane junction as far as the 'kink' in the road and the break in shopping frontages. Over a third (35.3%) of the units are occupied by comparison goods retailers, some of which are independent 'bulky goods' retailers (i.e. carpets and flooring, ironmongery). There are no convenience goods retailers or A3 services within this block. Around a third (35.3%) of the units are attributed to miscellaneous uses such as Lancing Community Centre and places of worship. Our site inspections recorded one vacant unit (5.9%). This block is outside the area identified as the 'village heart' in the 'Lancing Vision' report.

##### *Pedestrian Flows*

- 3.20 During our site inspections, we observed relatively low levels of pedestrian flows along these frontages.



#### *Rental Levels*

- 3.21 We understand that shop rental levels along South Street are below the highest levels for the town centre (c. £21-25 / sq foot).

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 3.22 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix C).

#### **Block 5**

#### *Composition of Uses*

- 3.23 Block 5 extends along the west side of South Street between the 'kink' in the road and the break in shopping frontages (to the north), and Brighton Road (to the south). As well as comprising a number of residential uses which cause substantial breaks in the shopping frontage, this frontage has a high proportion of retail uses (41.6%), including 33.3% comparison goods and 8.3% convenience goods. However, these are all small shops occupied by independent retailers, some of which are specialists. Block 5 has the highest proportion of A3 services within the town centre (16.6%), which perhaps benefit from the proximity of the beach and associated visitor attractions. A quarter of the units are also occupied by non-A3 services, namely takeaways and sandwich bars. Our site inspections recorded one vacant unit within this block (8.3%).

#### *Pedestrian Flows*

- 3.24 During our site inspections, we observed relatively low levels of pedestrian flows along this frontage.

#### *Rental Levels*

- 3.25 Shop rental levels along South Street are understood to be below the highest levels for the town centre (c. £21-25 / sq foot).

#### *RECOMMENDED FRONTAGE DESIGNATION*

- 3.26 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix C).

## **Block 6**

### *Composition of Uses*

- 3.27 Block 6 extends along the east side of South Street between the 'kink' in the road and the break in shopping frontages (to the north), and Brighton Road (to the south). This block contains the highest proportion of vacant units within the town centre (16%), whilst 52% of the premises are occupied by services; particularly non-A3 services (48%). In addition, around a third (32%) of the units are occupied by a range of comparison goods (i.e. charity shops, carpets and flooring) and convenience goods (i.e. Premier convenience store, confectionary) retailers.

### *Pedestrian Flows*

- 3.28 During our site inspections, we observed relatively low levels of pedestrian flows along this frontage.

### *Rental Levels*

- 3.29 Shop rental levels along South Street are understood to be below the highest levels for the town centre (c. £21-25 / sq foot).

### *RECOMMENDED FRONTAGE DESIGNATION*

- 3.30 On the basis of the above, we recommend that frontages within this block are designated *secondary shopping frontages* (refer to Appendix C).

## **Change of Use Policies**

- 3.31 In addition to advising on the designation of primary and secondary shopping frontages within Lancing town centre, it may be appropriate for the Council to consider separate policies for change of use within each block. Suggested policies (informed by our frontage analysis) are outlined below:

- **Blocks 1 / 2 (excluding the Queensway Shopping Precinct) / 3** – Our frontage analysis has demonstrated that these blocks comprise the majority of the town centre's main retail 'anchors' and attract the highest levels of pedestrian flows. The mix of retail uses (i.e. bakers, convenience stores, newsagents) is supplemented with day-to-day service uses (i.e. banks, cafes, dry cleaners). We consider that, in order to sustain the vitality and viability of these primary shopping frontages, the Council should seek to restrict changes of use from A1 retail to A2, A4 and A5 uses and other non-retail uses. However, we consider that change of use to A3 cafes and restaurants would be

preferable to long-term vacancies, as it would help to attract customers and increase dwell times within the 'village heart', including in the evenings.

- **Queensway Shopping Precinct (Block 2)** – Whilst we recommend that this shopping precinct on the east side of North Road is designated primary shopping frontage, our site inspections have identified a concentration of vacant units therein. On this basis, we consider that it should be afforded greater flexibility for change of use (compared with other frontages within Block 2) in order to reduce vacancy and sustain a diverse composition of uses. We therefore consider that A2, A3 and A5 uses would be preferable to long-term vacancy in this small development.
- **Blocks 4 / 5 / 6** – Our frontage analysis has shown that these blocks are predominantly secondary in nature, comprising a high proportion of service uses and lower-order retail uses. Our site inspections also identified relatively low levels of pedestrian flows along these frontages. We therefore consider that Blocks 4 / 5 / 6 should be afforded greater flexibility for change of use in order to sustain mixed use frontages and maximise the number of occupied units. In particular, we consider that changes of use from A1 to A2, A3 and A5 uses would be appropriate, where such A3 and A5 uses would not put at risk the amenity of adjoining residential areas. We consider it unlikely that A4 uses would be acceptable, owing to the proximity to residential areas. We also consider that conversion to residential use would be appropriate, where the buildings are suitable for this.

## 4. Southwick

- 4.1 Southwick has a small, self-contained local centre. It serves a large walk-in catchment and primarily performs a local shopping function. In the 1996 Local Plan, Southwick is identified as a 'town centre'.

### ***Town Centre Boundaries***

- 4.2 The 1996 Local Plan does not define a town centre boundary (or inset) for Southwick<sup>8</sup>. However, following detailed site inspections, we have identified the distribution of retail and service uses within the centre, in addition to other main town centre uses as defined by the NPPF (including offices, leisure and entertainment facilities).
- 4.3 Our proposed town centre boundary reflects the distribution of existing, and any future development opportunities for main town centre uses (refer to Appendix E). The following commentary seeks to explain the alignment of our proposed town centre boundary for Southwick:
- **Area to the north of Southwick Square** – Beyond the shopping frontages on the north side of Southwick Square, and Southwick's library, doctors' surgery and town centre car park to the rear of these frontages, this area predominantly comprises residential uses. Further, we have identified no future development opportunities to the north of Southwick Square. Our proposed town centre boundary therefore skirts the distribution of main town centre uses, and the town centre car park, but includes the doctors' surgery and the library.
  - **Area to the south of Southwick Square** – Beyond the shopping frontages on the south side of Southwick Square, this area predominantly comprises residential uses. Whilst we propose to include the public houses (fronting onto Southwick Street and Grange Road respectively) within the town centre boundary, we propose to exclude Southwick's social club, ambulance headquarters and telephone exchange; as these are adjoined by residential uses and are not well connected to the main town centre uses. In the event of future redevelopment, residential use would be more likely (and more appropriate) than main town centre uses.
  - **Area to the east of Southwick Street** – This area comprises Southwick's community centre; this is a main town centre use and is therefore included within our proposed town centre boundary. A further option is to include the Council-owned land to the north of Croft Avenue, which appears to be under-used at present and potentially represents a

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<sup>8</sup> The Proposals Map appears to designate the 'town centre' as *The Built Environment, Shopping and Business, Industry & Warehousing*.

future development opportunity<sup>9</sup>. It is our view that this option is more justifiable (primarily on the grounds of connectivity to main town centre uses) than the option to include Southwick’s social club, ambulance headquarters and telephone exchange within the town centre boundary (which we discount above). The parcel of land between Southwick’s community centre and the Council-owned land is occupied by residential uses, so is therefore excluded from our proposed town centre boundary.

- **Area to the west of Grange Road** – This area comprises recreational open space (known as The Green) with no main town centre uses. Development of this area would result in a very substantial loss of public amenity, and would be very unlikely to find support. We have therefore excluded this area from our proposed town centre boundary.

### **Primary and Secondary Shopping Frontages**

4.4 Due to the scale and compact nature of Southwick town centre, it is not considered appropriate to split the town centre into blocks of frontages (for analysis purposes). Notwithstanding this, Table 4-1 below analyses the overall composition of uses within the town centre<sup>10</sup> (by percentage), as follows:

- Comparison Retail (A1);
- Convenience Retail (A1);
- Total Retail (A1);
- A3 Service;
- Non-A3 Service (A2/A4/A5);
- Total Service (A2/A3/A4/A5);
- Office;
- Vacant; and
- Miscellaneous (i.e. hotels, schools, places of worship, residential care homes).

No. of Units	Comparison Retail (%)	Convenience Retail (%)	Total Retail (%)	A3 Service (%)	Non-A3 Service (%)	Total Service (%)	Office (%)	Vacant (%)	Misc (%)
44	29.5	13.6	43.2	6.8	38.6	45.4	2.3	2.3	6.8

**Table 4-1** (Source: ProMap, April 2012 DTZ Survey)

4.5 In summary, the majority of the units are occupied by services (45.4%), and only 6.8% are A3 services. The broad mix of day-to-day service uses (i.e. banks, dry cleaners, hairdressers) reflects the centre’s local role in the shopping hierarchy. Some 43.2% of the units are occupied by retailers (including 29.5% comparison goods and 13.6% convenience goods),

<sup>9</sup> It is our understanding that this parcel of land is bound (in part) by a listed wall, which potentially represents a development constraint.

<sup>10</sup> There is no Experian Goad data available for Southwick town centre; we therefore used ProMap as the basis for our site inspections.

many of which are independent retailers. Southwick town centre also includes the retail 'anchors' of Co-Op and WHSmith, and only one vacant unit (2.3%).

- 4.6 In the light of the diverse mix of retail and service uses within Southwick town centre, and its small scale and compact layout, there is no clear evidence to distinguish between primary and secondary shopping frontages. Further to this, pedestrian flows<sup>11</sup> and shop rental levels are similar throughout the town centre. We therefore recommend that all frontages (fronting onto Southwick Square) are designated *primary shopping frontages* (refer to Appendix E).

### ***Change of Use Policies***

- 4.7 It is not considered reasonable to apply separate policies for change of use within specific parts of Southwick town centre. We recommend that a single policy for change of use is applied to the town centre as a whole, which reflects its local (and vital) role in the shopping hierarchy. To that end, the Council should adopt a flexible approach to change of use in order to sustain mixed use frontages and maximise the number of occupied units. Such a policy would also reflect the important role of non-retail / service uses within the centre.

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<sup>11</sup> As observed during our site inspections.